

Collecting Specimens with CLM Standard

Overview

This chapter provides information about using CLM Standard to manage and monitor clinical specimen collection activities at the patient's bedside.

Sunquest recommends that before using Collection Manager, you familiarize yourself with the basic operation of the device and printer you will be using. In order to perform operations involving scanning, your device must be properly configured for scanning. Consult the manufacturer's documentation for your device for more information.

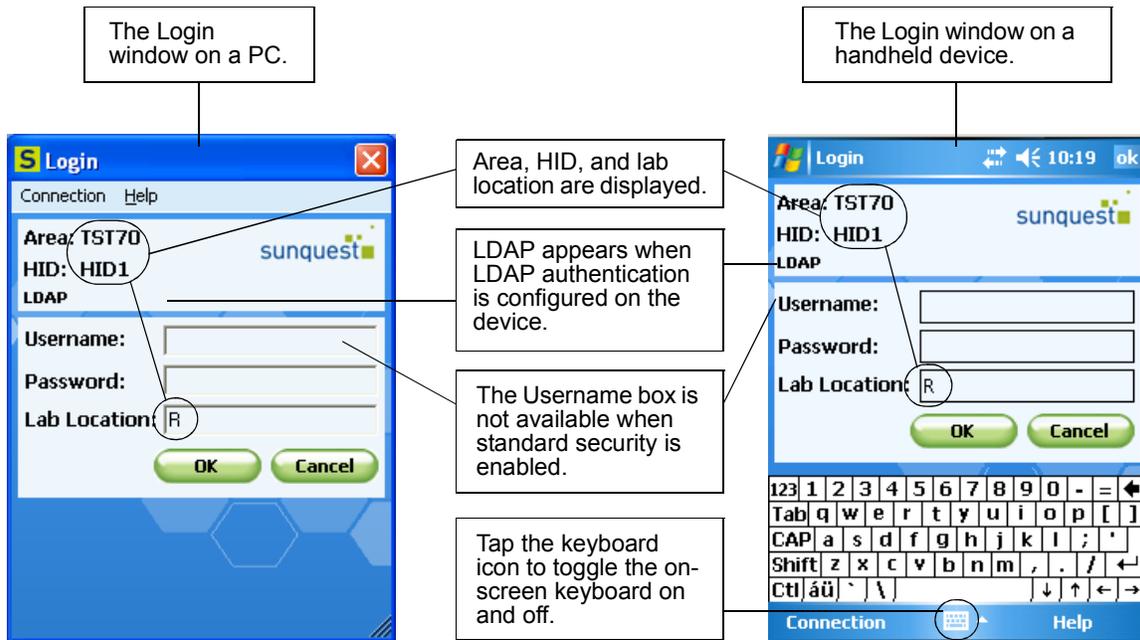
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Starting and Logging On to a Collection Manager Session

Description Use this procedure to start and log on to Collection Manager.

The following illustration shows an example of the Login window on a PC and on a handheld device, displaying the configured area, HID, and lab location.



You Need to Know With CLM Standard, you must have a network connection to the Sunquest Laboratory system at all times.

If the number of available Collection Manager licenses has been exceeded for your site, when you attempt to log on, the message “Connection license limit reached” appears. You cannot log on until another user logs off and a license becomes available.

On a PC, if CLM Standard is configured to use Epic integration and a user is logged on to Epic on the device, Collection Manager bypasses the Login window and opens automatically to the Patient List or Patient Id window.

Before You Begin Connect your device to the network.

Steps to Take On the device desktop,

- 1 To start Collection Manager, do one of the following:

On a ...	Do this ...
Handheld device	Tap Start , then Programs , and then CLM Standard . A status bar at the bottom of the window shows the progress of the connection and download process.

On a ...	Do this ...
PC	<ul style="list-style-type: none"> On the Start menu, point to Programs, then Sunquest, then Hosp, then Collection Manager, and then click CLM Standard.

2 One of the following occurs:

If ...	Do this ...
The Login window opens	Proceed with step 3.
The Work List, Patient List, or Patient Id window opens	<ul style="list-style-type: none"> For more information about the Work List window, see About the Phlebotomist's Collection Work List on page 30. For more information about the Patient List window, see Monitoring Collections on a Nurse's or ER Nurse's Patient List on page 32. For more information about the Patient Id window, see Getting to Know the Patient Id Window on page 42.

3 In the Login window, do one of the following:

In these editions ...	To log on with ...	Do this ...
<ul style="list-style-type: none"> CLM Standard CLM Remote 	Standard security Note <i>The Username box is unavailable.</i>	In the Password box, type your Sunquest Laboratory password.
<ul style="list-style-type: none"> CLM Standard CLM Remote 	Alternate security Note <i>You must enter a user ID.</i>	<ol style="list-style-type: none"> In the Username box, type your Sunquest Laboratory user ID. In the Password box, type your password.
<ul style="list-style-type: none"> CLM Surgical CLM Surgical (with Lab) 	Sunquest CoPathPlus credentials	<ol style="list-style-type: none"> In the Username box, type your CoPathPlus user ID. In the Password box, type your password.
<ul style="list-style-type: none"> CLM Standard CLM Surgical CLM Surgical (with Lab) 	LDAP authentication	<ol style="list-style-type: none"> In the Username box, type your Active Directory user ID. In the Password box, type your password.

4 Tap or click **OK**. One of the following windows opens:

- Work List (for phlebotomy users). For more information about the Work List window, see [About the Phlebotomist's Collection Work List](#) on page 30.

- Patient List (for nursing and ER nursing users who are configured to use it as their default window). For more information about the Patient List window, see [Monitoring Collections on a Nurse's or ER Nurse's Patient List](#) on page 32.
- Patient Id (for nursing and ER nursing users who are configured to use it as their default window). For more information about the Patient Id window, see [Getting to Know the Patient Id Window](#) on page 42.

Changing Your Password

Description When your password expires, you must enter a new one before you can log on to Collection Manager.

If the device is configured to use LDAP authentication, the following message appears when you try to log on to Collection Manager after your password expires.



The Active Directory password for LDAP cannot be changed in Collection Manager. Follow your site's procedures to change it.

If the device is configured to use Sunquest Laboratory to authenticate user credentials, the following message appears when you try to log on to Collection Manager after your password expires:



Use this procedure to change your Sunquest Laboratory password.

Steps to Take When the Password Change message appears,

- 1 Tap or click **Yes**. The Password Change window opens.
- 2 In the **New password** box, type your new password.
- 3 In the **Confirm password** box, type your new password again.
- 4 Tap or click **OK**.

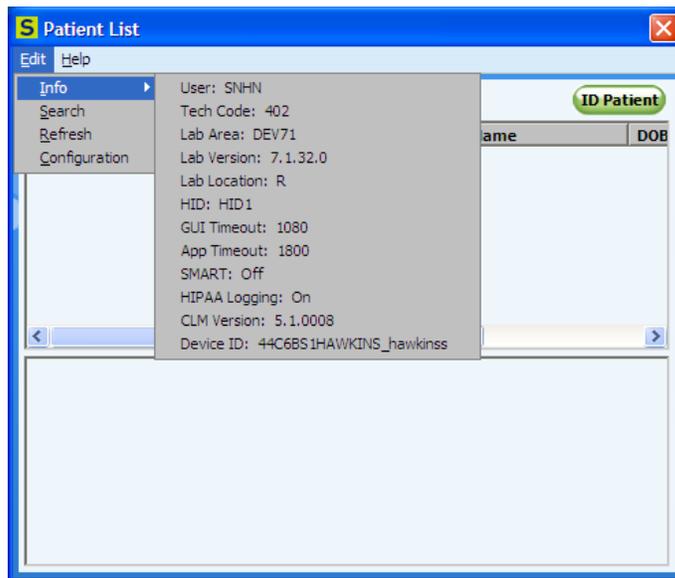
Viewing Information About the Current Collection Manager Session

Description Use this procedure to view information about the current session of Collection Manager.

If you are configured to use the Patient Id window as your default window, close it so that the Patient List window appears.

Steps to Take In the Work List or Patient List window,

- Tap or click **Edit**, then **Info**. Information pertinent to your configuration and edition of Collection Manager appears as in the following example:



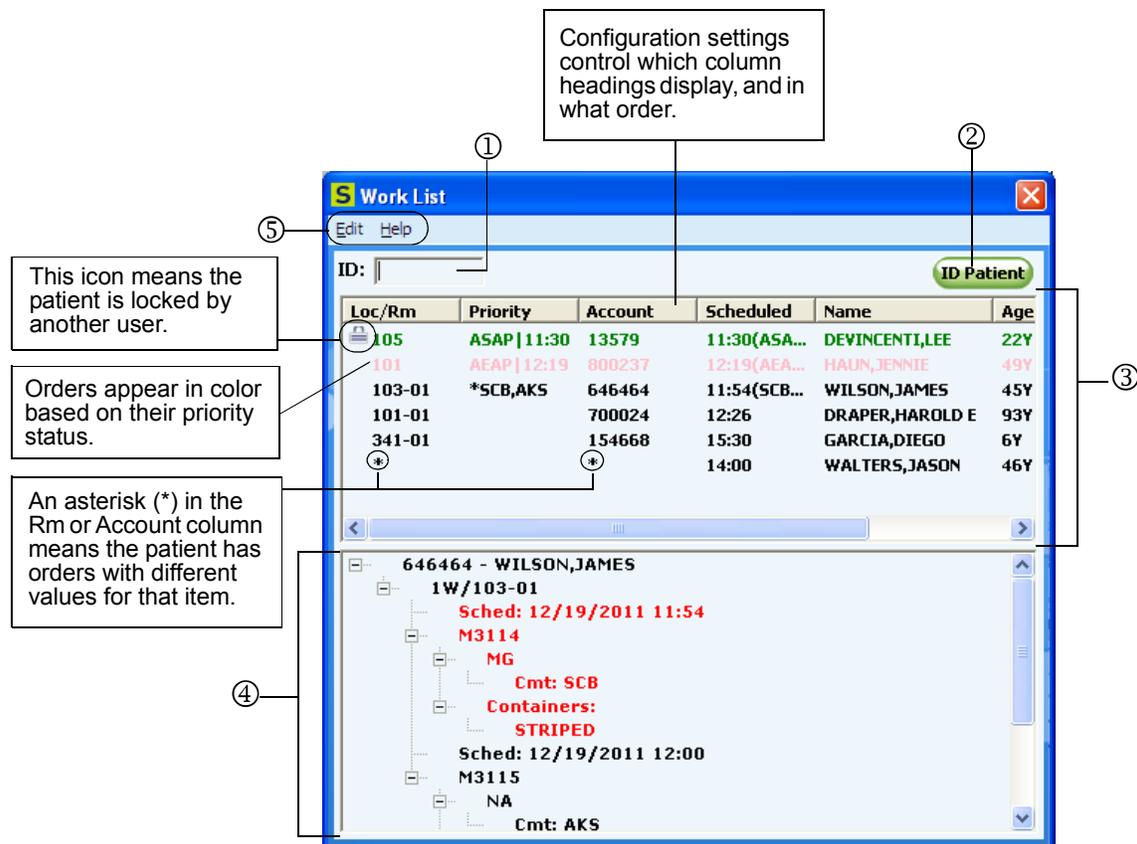
- The domain used for LDAP authentication (not shown)
- The Epic integration settings (not shown)
- The user name and tech code of the person currently logged on to the device
- The Sunquest Laboratory area, version, and location being accessed
- The facility's HID code
- The GUI timeout value, which is the number of seconds the device can be inactive before you must log on again; zero (0) indicates that the Sunquest Laboratory GUI application timeout value is being used
- The App timeout value, which is the number of seconds the device can be inactive after the GUI timeout threshold is reached before Collection Manager closes; zero (0) indicates the Collection Manager default of 300 seconds (5 minutes) is being used
- The SMART status
- The HIPAA logging status
- The release version of Collection Manager installed on the device
- The unique ID assigned to the mobile device

About the Phlebotomist's Collection Work List

The Collection Manager work list shows orders assigned to a phlebotomist that are awaiting collection. Orders for patients in your assigned location and your configured time frame automatically appear on your work list when they are ordered in Sunquest Laboratory.

If you are a phlebotomist, the Work List window is your primary interface between Sunquest Laboratory and Collection Manager. In the Work List window, you can view your collection work list and the status of collection orders for a selected patient. Pending orders automatically display on your work list. You can also display information about the current Collection Manager session.

The following illustration shows an example of the Work List window, the components of which are described in the text that follows.



1 - ID box Use the ID box to scan or manually enter a patient identifier.

2 - ID Patient button Use the ID Patient button to open the patient identification window.

3 - Collection work list The list of patients with pending orders. Information includes patient location and/or room, priority code modifiers, medical record number (MRN) or account number, scheduled collect times, name, age or

birthdate, and sex. Patients with orders that have priority modifiers (such as STAT, ASAP) are displayed in red or in the color defined in Sunquest Laboratory maintenance.

Your configuration settings for Collection Manager determine:

- The order in which columns are displayed.
- The default sort order for patients. Collection Manager may be configured to sort orders either by location or priority. If your user account is configured to sort orders by location, all orders are sorted by the patient's location, regardless of priority or collect status. If your user account is configured to sort by priority, uncollected and partially collected orders are grouped in the following order:
 - STAT orders with multiple accessions
 - STAT orders with only one accession
 - Priority orders with multiple accessions
 - Priority orders with only one accession
 - Routine orders with multiple accessions
 - Routine orders with only one accession

Within each grouping, orders are sorted by the earliest scheduled collect time.

The Priority column displays the following information, as applicable, for each patient:

- The scheduled collect time for the patient when the patient has a single order.
- An asterisk (*) when the patient has multiple accessions.
- Priority code modifiers (one or more), including T for timed draws.

Note If maintenance has been defined in Sunquest Laboratory for priority color and display order, tests appear in the color and order defined in MA 4. The priority color and display order definitions are available beginning with Sunquest Laboratory version 6.4.

The Scheduled column displays the complete set of collect times scheduled for a patient.

The Name column shows the patient's name. In addition, **-[disch]** to the right of the patient's name indicates that the patient's status in Sunquest Laboratory is Discharged.

A lock icon next to the patient's location or room indicates that the patient is downloaded on another device (CLM Remote) or that the patient record is open in the Collect window of another user (CLM Standard). You cannot view order details or perform collection tasks for the patient until the lock clears.

4 - Status pane Displays collection details for the patient currently selected in the collection work list.

5 - Menu options

- **Edit.** Tap or click to display these commands:
 - **Info.** Displays information about the current Collection Manager session.

- **Refresh.** Use to update work list information.
- **Configuration.** Opens a window to configure Collection Manager features.
- **Help.** Opens a help topic for the current window.

Monitoring Collections on a Nurse's or ER Nurse's Patient List

Nurses and ER nurses can use the Collection Manager patient list to display a list of the patients for whom they are responsible. The patient list displays pending orders for each patient so that collections can be monitored and collection tasks can be performed.

To create a patient list for collection monitoring, you must have the security level to use Collection Manager as a nursing or ER nursing user. When you log on to CLM Standard with one of those security levels, the Patient List window opens, either by default or behind the Patient Id window, depending on your configuration. If the Patient Id window opens first, you can close it to see the Patient List window.

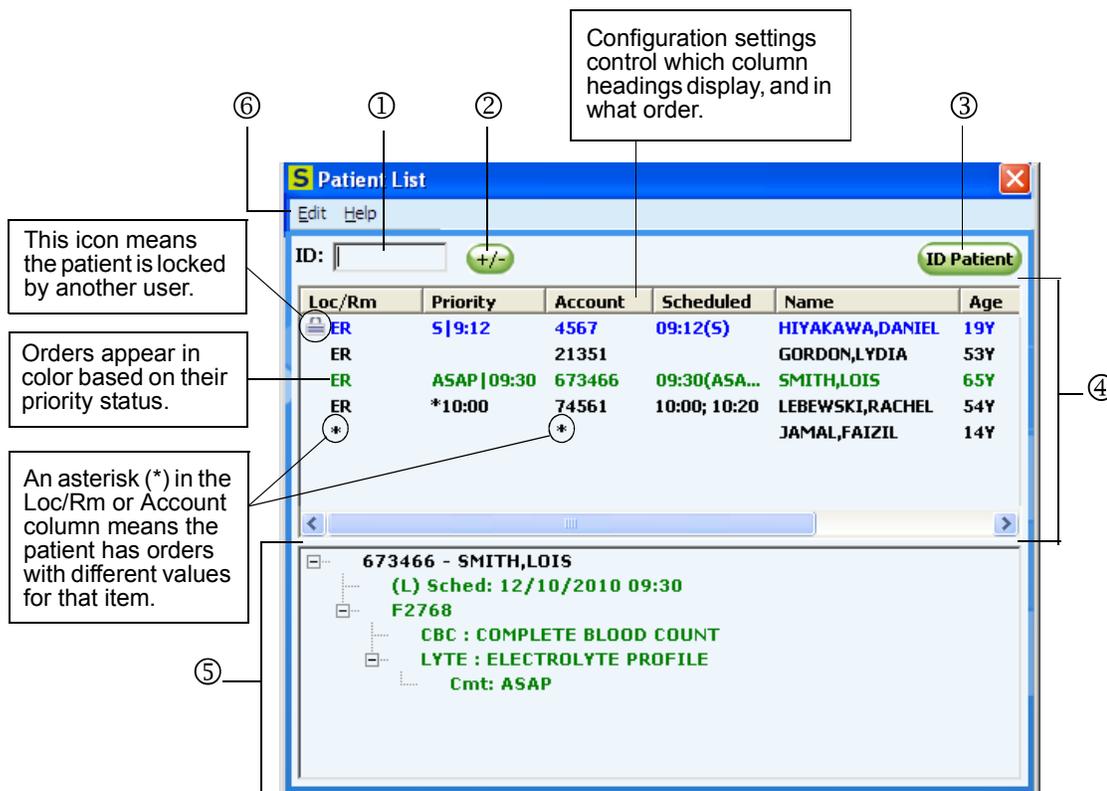
For more information, see ...

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About the Patient List Window

In the Patient List window, you can create and view a customized list of the patients for whom you are responsible. You can log on to Collection Manager and access your patient list from any PC or handheld device in your facility with CLM Standard installed. You can view tests that are scheduled for your patients and monitor collections, including restricted accessions, which are not available to phlebotomists on the collection work list. You can also scan patient IDs and perform collection tasks.

The following illustration shows the components of the Patient List window, which are described in the text that follows.



1 - ID box Use to scan or manually enter a patient identifier.

2 - Add/Remove Patient button Use to add or remove a patient from the list.

3- ID Patient button Tap or click to open the Patient Id window.

4- Patient List The list of patients monitored includes patient location and/or room, priority code modifiers, medical record number (MRN) or account number, scheduled collect times for orders in the configured time range, name, age or birth date, and sex. Patients with orders that have priority modifiers (such as STAT or ASAP) are displayed in red or in the color defined in Sunquest Laboratory maintenance.

Your configuration settings for Collection Manager determines:

- The order in which columns are displayed.
- The default sort order for patients. Collection Manager may be configured to sort orders either by location or priority. If your user account is configured to sort orders by location, all orders are sorted by the patient's location, regardless

of priority or collect status. If your user account is configured to sort by priority, uncollected and partially collected orders are grouped in the following order:

- STAT orders with multiple accessions
- STAT orders with only one accession
- Priority orders with multiple accessions
- Priority orders with only one accession
- Routine orders with multiple accessions
- Routine orders with only one accession

Within each grouping, orders are sorted by the earliest scheduled collect time.

The Priority column displays the following information, as applicable, for each patient:

- The scheduled collect time for the patient when the patient has a single order.
- An asterisk (*) when the patient has multiple accessions.
- Priority code modifiers (one or more), including T for timed draws.

Note If maintenance has been defined in Sunquest Laboratory for priority color and display order, tests appear in the color and order defined in MA 4. The priority color and display order definitions are available beginning with Sunquest Laboratory version 6.4.

The Scheduled column displays the complete set of collect times scheduled for a patient.

The Name column shows the patient's name. In addition, **-[disch]** to the right of the patient's name indicates that the patient's status in Sunquest Laboratory is Discharged.

A lock icon next to the patient's location or room indicates that the patient is downloaded on another device (CLM Remote) or that the patient record is open in the Collect window of another user (CLM Standard). You cannot view order details or perform collection tasks for the patient until the lock is cleared.

5- Status pane Displays collection information for the patient currently selected in the patient list.

6- Menu options

- **Edit.** Tap or click to display these commands:
 - **Info.** Displays information about the current Collection Manager session.
 - **Search.** Use to search for patients to add to the Patient List.
 - **Refresh.** Use to update data in the patient list.
 - **Configuration.** Opens the configuration settings window.
- **Help.** Opens a help topic for the current window.

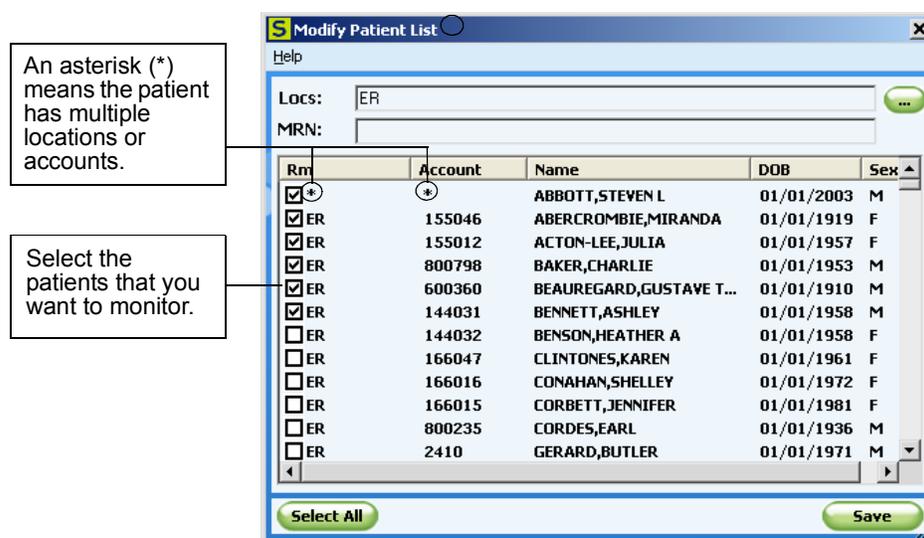
Creating a List of Patients to Monitor

Description If you log on as a Collection Manager nursing or ER nursing user, you can create a list of the patients you care for.

You Need to Know Depending on your configuration, the Patient Id window may open by default after you log on to Collection Manager. You can close it to see the Patient List window. For information about configuring the default window, see [Configuring the Work List or Patient List](#) on page 69 in the *Sunquest Collection Manager Administrator's Guide*.

Steps to Take In the Patient List window,

- 1 On the **Edit** menu, tap or click **Search**. The Modify Patient List window opens, displaying a list of all patients in the locations configured for your user account.



- 2 To select patients to add to the patient list, do one of the following:
 - Scroll down the list of patients and select the check box next to each patient you want to include.
 - In the **MRN** or **Account #** box, enter a patient identifier. When you move out of the box, that patient's record is selected.
 - To select all patients in the list, tap or click **Select All**.
- 3 To select patients from another location, do the following:
 - a In the **Loc** box, enter the new location or use the lookup button to select a location. Records for all previously selected patients are moved to the top of the list and displayed alphabetically by location. Patients in the specified location appear in a list below the patients you have already selected.
 - b Repeat step 2 for patients in the new location.
- 4 When you are finished selecting patients, tap or click **Save**. The Patient List window opens, showing your list of patients.

Related Topics

[Modifying the List of Patients to Monitor](#) on page 36

[Adding or Removing Individual Patients in the Patient List Window](#) on page 36

[Checking the Collection Status of a Patient](#) on page 40

[Recording Collection Tasks](#) on page 49

Modifying the List of Patients to Monitor

Description Use this procedure to add or remove patients in the Patient List window.

Steps to Take In the Patient List window,

- 1 On the **Edit** menu, tap or click **Search**. The Modify Patient List window opens, displaying a list of all patients in the configured locations and all patients in any other location in your current patient list.
- 2 To remove a patient from your list, clear the check box next to the patient.
- 3 To add a patient to your list, select the check box next to the patient or enter individual patient identifiers in the **MRN** or **Account#** box. For more information, see [Creating a List of Patients to Monitor](#) on page 35.
- 4 Tap or click **Save**. Your updated patient list appears in the Patient List window.

Related Topics

[Adding or Removing Individual Patients in the Patient List Window](#) on page 36

Adding or Removing Individual Patients in the Patient List Window

Description In the Patient List window, you can quickly add or remove individual patients without searching the entire list of patients for a location.

Steps to Take In the Patient List window,

◆ To add a patient

- 1 Do one of the following:
 - Scan the patient's wristband. The patient identifier appears in the ID box.
 - In the ID box, enter the MRN or account number for the patient.
- 2 Tap or click , if needed. The patient is added to the patient list.

Note If your scanner is configured to send a TAB character when a patient identifier is scanned, you do not need to tap or click .

◆ To remove a patient

- 1 Do one of the following:
 - Scan the patient's wristband. The patient identifier appears in the ID box.
 - In the ID box, enter the MRN or account number for the patient.
 - In the patient list, select the patient you want to remove.

2 Tap or click . The patient is removed from the patient list.

Related Topics

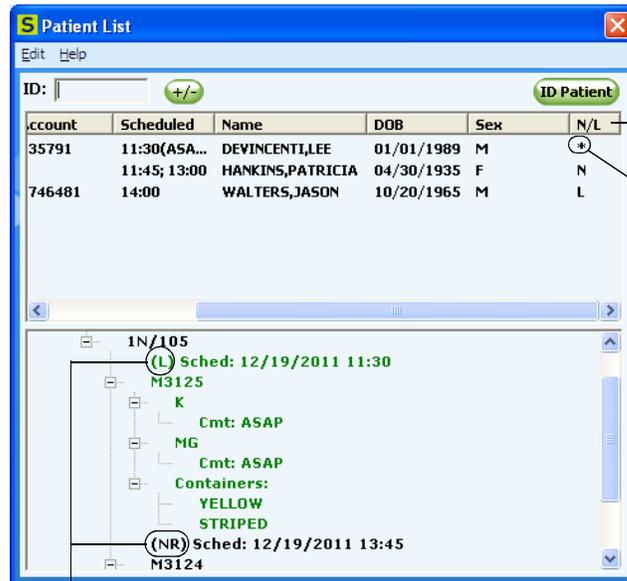
[Creating a List of Patients to Monitor](#) on page 35

[Modifying the List of Patients to Monitor](#) on page 36

Assigning Draw Responsibility for Patient Orders

Description Nursing and ER nursing users can manage the responsibility for who collects which specimens. If an order is assigned to a phlebotomist to collect the specimen, it can be assigned to a nurse to collect it instead, and vice versa. This feature can be useful in an environment where both nurses and phlebotomists collect specimens.

When the draw responsibility feature is enabled, indicators appear in both the patient list and the status pane in the Patient List window:



A summary of draw responsibility appears in the N/L column on the right side of the patient list.

An asterisk (*) indicates there is a mix of nurse-to-collect and lab-to-collect orders for the patient.

Draw responsibility details for the selected patient appear above each accession number in the status pane.

The following table summarizes how nurses and ER nurses can identify and change draw responsibility for an order:

If an order is ...	The patient list indicator is ...	The order is visible to ...	And a nursing or ER nursing user can ...
Lab-to-collect, unrestricted	(L)	Nurses, ER nurses, and phlebotomists	Change draw responsibility to nurse-to-collect. Note <i>The order status in Sunquest Laboratory is not changed</i>
Lab-to-collect, restricted	(LR)	Nurses and ER nurses only	See the order in the patient list and collect the specimen, but cannot remove the restriction on the order nor change the draw responsibility.
Nurse-to-collect, restricted	(NR)	Nurses and ER nurses only	Change draw responsibility to lab-to-collect. Note <i>The order becomes unrestricted and the order status in Sunquest Laboratory is changed.</i>
Nurse-to-collect, unrestricted	(N)	Nurses and ER nurses only	Change draw responsibility to lab-to-collect. Note <i>The only time an unrestricted nurse-to-collect order appears is after the draw responsibility for a lab-to-collect order has been changed in Collection Manager. Changing the draw responsibility on an unrestricted nurse-to-collect order simply puts the order back in its original lab-to-collect state.</i>

You Need to Know To assign draw responsibility, you must have nursing or ER nursing security in Sunquest Laboratory or, if you use LDAP authentication, you must be a member of the Nursing or ER Nursing group. For more information about user security, see the *Sunquest Collection Manager Installation Guide*.

Phlebotomists do not see draw responsibility indicators on their work lists, nor can they change draw responsibility for an order. What phlebotomists see are orders either added to or removed from their collection work lists after draw responsibility has been changed by a nursing or ER nursing user.

Before You Begin The site parameter in Sunquest Laboratory function CLM must be configured to enable the draw responsibility feature. For more information, see [Configuring Collection Manager Site Parameters](#) on page 127 in the *Sunquest Collection Manager Administrator's Guide*.

Close any open windows, such as the Patient Id window, so that the Patient List window displays on your screen.

If necessary, add the patient to the patient list. For more information, see [Creating a List of Patients to Monitor](#) on page 35.

Steps to Take In the Patient List window,

- 1 Tap or click a patient to select it or tap and hold or double-click a patient to display order details in the status pane.
- 2 Do one of the following:

To ...	Do this ...
Change draw responsibility for all pending orders for the patient.	In the patient list, tap and hold or right-click the indicator for the patient you want to make the change for. Note <i>If an asterisk (*) appears in the N/L column, the patient has a mix of nurse-to-collect and lab-to-collect orders and you must change draw responsibility in the status pane.</i>
Change draw responsibility at the location level for a patient.	In the status pane, tap or click the location.
Change draw responsibility at the account level for a patient.	In the status pane, tap or click the account number. Note <i>Account number appears if Collection Manager is configured to use account number as the patient identifier. For more information, see Setting General Operating Parameters on page 54 of the Sunquest Collection Manager Administrator's Guide.</i>
Change draw responsibility at the accession level for a patient.	In the status pane, tap or click the collect date and time directly above the accession number.

A confirmation window appears.

- 3 Tap or click **Yes** to accept the designated change. If you try to change draw responsibility for a lab-to-collect restricted order, a message appears that the order needs to be unrestricted in lab, and the order remains unchanged.

Monitoring Patients' Orders and Collections

Description On the patient list, you can view pending orders for your patients and monitor their collections.

Before You Begin Create a list of the patients you want to monitor. For more information, see [Creating a List of Patients to Monitor](#) on page 35 or [Adding or Removing Individual Patients in the Patient List Window](#) on page 36.

Steps to Take In the Patient List window,

- Watch for the following indicators of collection status for your patients:
 - Time indicator in the Priority and Scheduled columns
 - Color and code to indicate a priority
 - Asterisk in the priority column to indicate multiple accessions

- Asterisk in the location or account number columns to indicate multiple values
- Lock to indicate that another user is doing a collection

On the Edit menu, click **Refresh** to update collection data.

A time or priority code in the Priority column indicates a test has been ordered for a patient. An * indicates multiple accessions.

Loc/Rm	Priority	Account	Scheduled	Name	Age
ER	S 9:12	4567	09:12(S)	HIYAKAWA,DANIEL	19Y
ER		21351		GORDON,LYDIA	53Y
ER	ASAP 09:30	673466	09:30(ASA...	SMITH,LOIS	65Y
ER	*10:00	74561	10:00; 10:20	LEBEWSKI,RACHEL	54Y
*		*		JAMAL,FAIZIL	14Y

Records displayed in color indicate a special priority status.

Double-tap or double-click an order in the top pane to display detailed test information in the bottom pane.

673466 - SMITH,LOIS
 (L) Sched: 12/10/2010 09:30
 F2768
 CBC : COMPLETE BLOOD COUNT
 LYTE : ELECTROLYTE PROFILE
 Cmt: ASAP

Checking the Collection Status of a Patient

Description Use this procedure to see status information about a patient, including all scheduled collect times for uncollected orders.

Steps to Take In the Work List or Patient List window,

- Double-tap or double-click the patient in the collection work list or patient list for whom you want to see status information. Status information is displayed in the status pane at the bottom of the window.

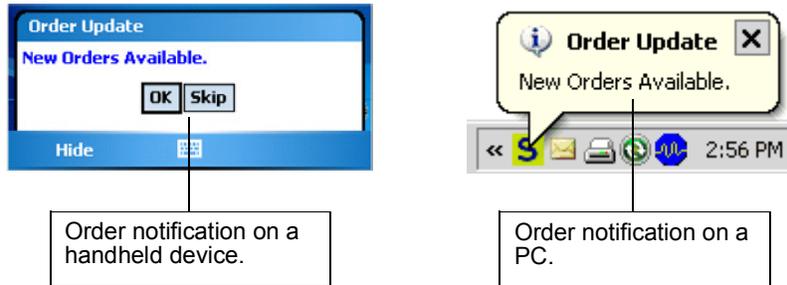
Note To adjust the relative sizes of the collection list and status pane, tap or click and drag the bar dividing the collection list from the status pane.

Responding to Pending Order Notifications

Description Collection Manager can be configured to perform periodic searches for pending orders and automatically update your work list or patient list. Collection Manager can also be configured to notify users if such updates occur when the

Collection Manager program is not running. Your notification alert consists of a notification message displayed on your screen and, if your hardware supports it, an audio tone may sound or an LED may flash.

The following illustrations show the Order Update message on a handheld device and on a PC.



Notifications are sent to either an individual user if you are using the nursing or ER nursing workflow, or to all users assigned to a location if you are using the phlebotomist workflow.

Steps to Take On the device,

◆ **To respond to order notifications on a handheld device**

- Do one of the following:
 - If Collection Manager is not running, a message appears and, if configured, the audio or LED display alerts are activated. Tap **OK** to open Collection Manager and view new orders on the work list or patient list, or tap **Skip** to close the message without opening Collection Manager.
 - If Collection Manager is running, if configured, the audio or LED display alerts are activated. View new orders on the work list or patient list.

◆ **To respond to order notifications on a PC**

- Do one of the following:
 - If Collection Manager is not running, a message appears and, if configured, the audio alerts are activated. Click anywhere inside the notification message to open Collection Manager, log on, and view new orders on the work list or patient list. Or click **X** in the upper right corner of the notification message to close it without taking any action in Collection Manager.
 - If Collection Manager is running, click anywhere inside the notification message to close it, and then view the new order in Collection Manager.

Identifying Patients for Specimen Collection

Collection Manager allows you to confirm a patient's identity by scanning the patient's wristband or, if your configuration allows it, by manually entering the patient's ID from the wristband.

For more information, see ...

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Getting to Know the Patient Id Window

When you scan or enter a patient ID, Collection Manager automatically searches for patient information and pending orders in Sunquest Laboratory. If orders are found, you can collect and label specimens for them. If orders are not found in Sunquest Laboratory, if the patient is not found, or if you need to print labels for specimens that are not associated with a pending order, you have the option to print temporary labels.

After you scan or enter a patient ID, if patient information is found in Sunquest Laboratory, it appears in the Patient Id window.

The patient identifier is either the medical record number (MRN) or the account number, depending on your configuration.

If the M button appears, you must tap or click it to select a reason for manually entering the patient ID before you can click Confirmed or Ordered.

ER nursing users see Rainbow and Ordered buttons at the bottom of the window when a patient has a pending order in Sunquest Laboratory.

This example shows pending orders for three account numbers, two of which are selected.

Collection Manager can be configured to require a reason code each time a patient ID is entered manually. After you type a patient ID, if the M button appears, you must enter a reason code before you can click the Confirmed or Ordered buttons.

Information about patients and their pending orders appears in a hierarchical format in the Patient Id window. Depending on your configuration, Collection Manager displays patient data grouped in this order:

- Medical Record Number (MRN)
- Account number (if account number is configured as the patient identifier)
- Location

When there are pending orders for a patient, the associated MRN, account, or location is selected automatically and a check mark appears next to it. To clear a selection, click that level in the hierarchy; click it again to select it. For example:

- Click an account number to clear it.
- Click a location to clear just that location.
- Click the MRN to clear all selections in the Patient Id window at once, and then click the accounts or locations you want to select.

After selections have been made, click the Confirmed or Ordered button to perform collection tasks for pending orders that match your selection. For more information about collection tasks, see [Collecting Specimens for Pending Sunquest Laboratory Orders](#) on page 46.

The Rainbow button appears for users who are configured as ER nursing users. Click the Rainbow button any time after entering the patient ID to open a Temporary Label window and print labels for a rainbow package. For more information, see [Printing Temporary Labels \(ER Nurse\)](#) on page 60.

Identifying Patients (Phlebotomist or Nurse)

Description Use this procedure to scan a patient ID or enter it manually and verify the patient's identity.

Steps to Take In the Work List, Patient List, or Patient Id window,

- 1 Do one of the following:

In this window ...	Do this ...
Work List or Patient List	<p>Do one of the following:</p> <ul style="list-style-type: none"> • Scan or type a patient identifier in the ID box, and then tap or click ID Patient to open the Patient Id window. • Tap or click ID Patient to open the Patient Id window, and then scan or type a patient identifier in the Medical Record Number or Account Number box. <p>Note To complete a manual entry, after typing a patient identifier in the Patient Id window, press or tap the Tab or Enter key, or click or tap anywhere in the Patient Id window.</p>

In this window ...	Do this ...
Patient Id	<p>In the Medical Record Number or Account Number box, scan or type a patient identifier.</p> <p>Note To complete a manual entry, after typing a patient identifier in the Patient Id window, press or tap the Tab or Enter key, or click or tap anywhere in the Patient Id window.</p>

Collection Manager searches Sunquest Laboratory for patient information and pending orders.

- 2 If you entered the patient ID manually and the M button appears, before you can click the Confirmed button, you must enter a reason code. For more information, see [Entering Manual Entry Codes](#) on page 66.
- 3 After you scan or enter a patient ID, one of the following occurs:

If this occurs ...	Do this ...
Patient information appears in the Patient Id window along with buttons labeled Cancel and Confirmed .	<p>To start over with the same or a different patient, click Cancel. Otherwise, to proceed with this patient:</p> <ol style="list-style-type: none"> 1 Confirm that the patient information is correct. 2 If applicable, to include or exclude account numbers or locations for which to collect specimens, depending on the information displayed in the Patient Id window, tap or click: <ul style="list-style-type: none"> • The medical record number (MRN) • One or more account numbers • One or more locations <p>Account numbers or locations selected for collection are highlighted with a check mark next to each one.</p> 3 Tap or click Confirmed. 4 Do one of the following: <ul style="list-style-type: none"> • If the Collect window opens, you are ready to collect and label specimens. See Collecting Specimens for Pending Sunquest Laboratory Orders on page 46 and Rescheduling, Crediting, and Adding Tests or Test Comments on page 51. • If a message appears that there are no pending collection orders for the patient, click Yes to print temporary labels and see Printing Temporary Labels (Phlebotomist or Nurse) on page 59, or click No to return to the Work List, Patient List, or Patient Id window.
A message appears indicating that the patient ID you entered is not found in lab. You have the option to print temporary labels.	<p>Do one of the following:</p> <ul style="list-style-type: none"> • To print temporary labels, tap or click Yes. For more information, see Printing Temporary Labels (Phlebotomist or Nurse) on page 59. • To return to the Work List, Patient List, or Patient Id window without printing temporary labels, tap or click No.

Identifying Patients (ER Nurse)

Description Use this procedure to scan a patient ID or enter it manually and verify the patient's identity.

Steps to Take In the Patient List or Patient Id window,

- 1 Do one of the following:

In this window ...	Do this ...
Patient List	<p>Do one of the following:</p> <ul style="list-style-type: none"> • Scan or type a patient identifier in the ID box, and then tap or click ID Patient to open the Patient Id window. • Tap or click ID Patient to open the Patient Id window, and then scan or type a patient identifier in the Medical Record Number or Account Number box. <p>Note To complete a manual entry, after typing a patient identifier in the Patient Id window, press or tap the Tab or Enter key, or click or tap anywhere in the Patient Id window.</p>
Patient Id	<p>In the Medical Record Number or Account Number box, scan or type a patient identifier.</p> <p>Note To complete a manual entry, after typing a patient identifier in the Patient Id window, press or tap the Tab or Enter key, or click or tap anywhere in the Patient Id window.</p>

Collection Manager searches Sunquest Laboratory for patient information and pending orders.

- 2 If you entered the patient ID manually and the M button appears, before you can click the Ordered button, you must enter a reason code. For more information, see [Entering Manual Entry Codes](#) on page 66.
- 3 After you scan or enter a patient ID, one of the following occurs:

If this occurs ...	And you want to ...	Do this ...
Patient information appears in the Patient Id window along with buttons labeled Rainbow and Ordered .	Print temporary labels for a rainbow draw or other specimens.	<ol style="list-style-type: none"> 1 Confirm that the patient information is correct. 2 Tap or click Rainbow. The Temporary Label window opens. See Printing Temporary Labels (ER Nurse) on page 60.

If this occurs ...	And you want to ...	Do this ...
Patient information appears in the Patient Id window along with buttons labeled Rainbow and Ordered .	Collect and label specimens for a pending laboratory order.	<ol style="list-style-type: none"> To include or exclude account numbers or locations for which to collect specimens, depending on the information displayed in the Patient Id window, tap or click: <ul style="list-style-type: none"> The medical record number (MRN) One or more account numbers One or more locations Account numbers or locations selected for collection are highlighted with a check mark next to each one. Tap or click Ordered. The Collect window opens and you are ready to collect and label specimens. See Collecting Specimens for Pending Sunquest Laboratory Orders on page 46 and Rescheduling, Crediting, and Adding Tests or Test Comments on page 51.
The Temporary Label window opens automatically.	Print temporary labels.	<ol style="list-style-type: none"> If needed, enter or update information in the Temporary Label window. Tap or click Label. For more information, see Printing Temporary Labels (ER Nurse) on page 60.
The Temporary Label window opens automatically.	Close the window without printing temporary labels.	<ul style="list-style-type: none"> Click Cancel.

Collecting Specimens for Pending Sunquest Laboratory Orders

Collection tasks consist of printing container labels, recording collection data, and make any necessary modifications to collection orders. If you are collecting specimens for a patient who has orders pending in Sunquest Laboratory, these tasks are performed from the Collect window.

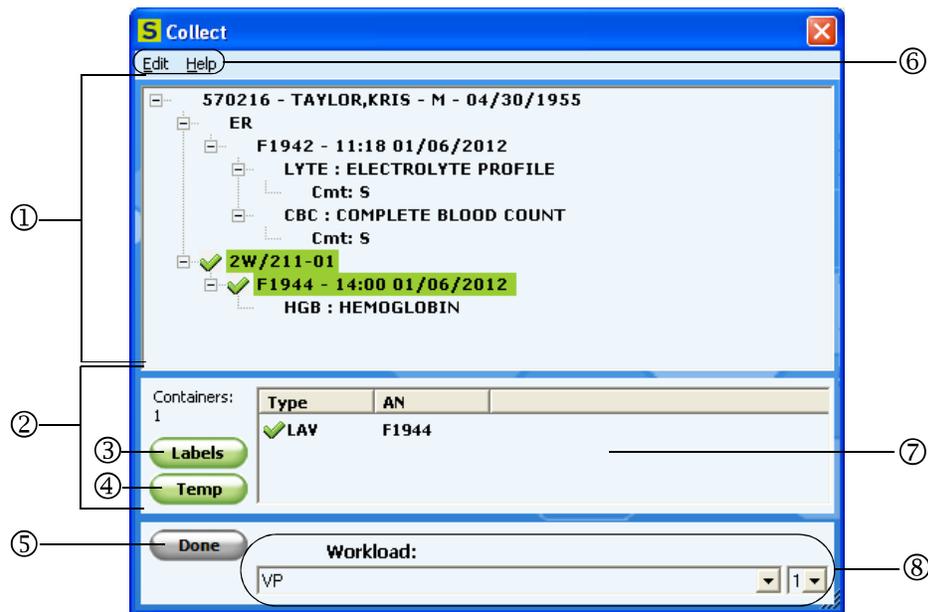
For more information about modifying collection orders, see [Rescheduling, Crediting, and Adding Tests or Test Comments](#) on page 51.

For more information, see ...	
Getting to Know the Collect Window	46
Collecting Specimens for Pending Sunquest Laboratory Orders	46
Printing Container Labels	50

Getting to Know the Collect Window

In the Collect window, you can select tests for collection, make any necessary modifications to collection orders, print container labels, and record collection data.

The following illustration shows the components of the Collect window.



1 - Order details Depending on your configuration, this area displays the patient's MRN, or MRN and account number; name, sex, age or date of birth, discharge status, and the orders scheduled for the patient grouped by account number, location, and accession. Accessions are listed, in ascending order, by collect time and date. For tests that are part of a package, the package code displays next to each test. At sites with Sunquest Laboratory versions 6.4 and later, if a tube draw order has been defined in MA 9, tests appear in the order in which they should be drawn.

Any comments entered in Sunquest Laboratory or Collection Manager display in the order details pane. Types of comments that may be displayed are:

- Administrative data comments under the patient's name
- Order comments
- Specimen comments
- Special draw instructions under the accession number
- Test comments under individual tests.

Beginning with Sunquest Laboratory version 6.4, special draw instructions can be defined by test in MA 1.

Select or clear the tests for which you want to collect specimens by tapping or clicking the medical record number, account number, location, or accession number. Your selections are highlighted and marked with a check mark.

2 - Containers For all selected accessions, this area shows:

- The accession numbers and containers required for the selected accessions.
- If SMART is enabled, container IDs (CIDs)

- The Labels and Temp buttons
- The total number of containers selected for collection.

3 - Labels Prints labels for the specimen containers of the selected accessions.

4 - Temp Prints temporary labels if needed to label a specimen that is not associated with an order. Temporary labels contain information about the patient and the person performing the collection, but other information regarding the order or container must be written on the label by hand.

5 - Done Saves and records the collection data, indicating that you have completed all collection tasks for the selected accessions. Only collected accessions are updated in Sunquest Laboratory.

6 - Menu options

- **Edit.** Depending on your security level, tap or click to display these commands:
 - **Reschedule.** Opens a window in which you can reschedule tests for a different date or time.
 - **Credit.** Opens a window in which you can credit tests that were ordered then later cancelled.
 - **Add Test.** Opens a window in which you can add tests to an existing order.
 - **Add Comment.** Opens a window in which you can add comments to accessions or tests using standard text codes or free text.
 - **Printer Connection.** Allows you to change the printer connection mode at the time of specimen collection. For more information, see [Switching Between Printer Connection Modes](#) on page 63.
- **Help.** Opens a help topic for the current window.

7 - Container list A list of the containers needed to complete the collection orders for the selected accessions, sorted by type. If SMART is enabled, the CIDs appear next to each container type. The total number of selected containers appears above the Labels button. Labels are printed for all selected containers when you tap or click Labels.

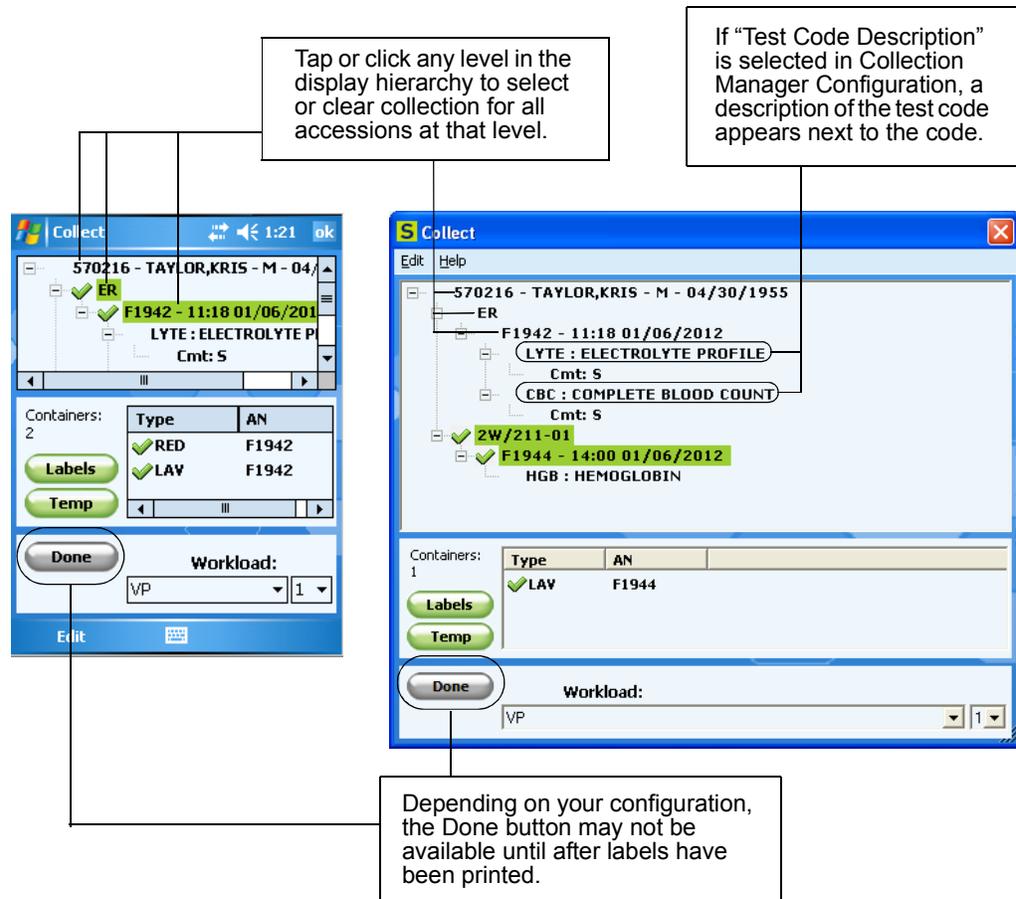
8 - Workload If configured, Workload boxes allow you to record the workload code associated with the collections for the selected accession numbers and the number of collections performed for those accessions.

In Sunquest Laboratory, workload definitions assign work units to tests and methods, indicating the amount of time it takes to complete a test. When hospital or laboratory personnel enter results for a test, they indicate the workload method used. Sunquest Laboratory then performs calculations using the workload data. For more information about workload, see your Sunquest Laboratory documentation.

Recording Collection Tasks

Description Use this procedure to record the collection data associated with collecting specimens from a patient who has orders pending in Sunquest Laboratory.

The following illustration shows the Collect window on a handheld device and on a PC with collection information for a patient with two accessions in two locations. One accession is selected. Containers required for the selected accession appear in the containers list.



You Need to Know While the Collect window is open, the patient record is locked in Sunquest Laboratory and in Collection Manager. The record cannot be modified in Sunquest Laboratory, and other Collection Manager users cannot view order details or perform collection tasks on another device.

If you cannot complete a collection, you can reschedule or credit the related tests. For more information, see [Rescheduling Tests](#) on page 52 and [Crediting Tests](#) on page 53.

Before You Begin Identify the patient and open the Collect window. For more information, see [Identifying Patients \(Phlebotomist or Nurse\)](#) on page 43 or [Identifying Patients \(ER Nurse\)](#) on page 45.

If applicable, do one or more of the following:

- Reschedule tests. For more information, see [Rescheduling Tests](#) on page 52.
- Credit tests. For more information, see [Crediting Tests](#) on page 53.
- Add tests. For more information, see [Adding Tests to an Existing Order](#) on page 55.
- Add comments. For more information, see [Adding Test Comments](#) on page 57.

Steps to Take In the Collect window,

- 1 Tap or click the account number, location, and accessions, as appropriate, for which to perform collections. To select all accessions, tap or click the patient name. A check mark appears next to each selected accession and information about the containers needed for collection appears in the Containers box.
- 2 Perform the collections required for the selected accessions.
- 3 If you are not using SMART, clear the check box for any container that remains uncollected. If you are using SMART, this occurs automatically.
- 4 Click **Label** to print labels for the selected containers and affix the labels to the appropriate containers. For more information, see [Printing Container Labels](#) on page 50.

Note You should check the quality of the labels before tapping or clicking Collect, because the order will be removed from your list after collection.

- 5 Log workload data for the selected accessions, if applicable, by doing the following:
 - a In the first **Workload** list, tap or click the appropriate workload code for this task.
 - b In the second **Workload** list, tap or click the number of collections you performed for this accession.
- 6 Tap or click **Done**. Collection data automatically uploads to Sunquest Laboratory. An indicator tracks the process.
- 7 If there are remaining uncollected accessions for the patient, do one of the following:

To ...	Do this ...
Collect specimens for additional accessions.	Repeat steps 1 through 6 for all accessions to be collected.
End the session without collecting specimens for the remaining accessions.	Close the Collect window. Depending on your configuration, the Work List, Patient List, or Patient Id window opens.

Printing Container Labels

Description Use this procedure to print labels for specimen containers. The labels that you print for patients' pending orders contain all of the patient and collection data needed to process a specimen in the lab. You can also print temporary labels if

you need to collect specimens that are not associated with an order. Temporary labels contain information about the patient and the person performing the collection. Any other information, however, must be written on the label by hand.

You Need to Know You can switch between infrared (IrDA), cabled, WiFi, Windows printer, and Bluetooth printing modes depending on your device's capabilities. For more information, see [Switching Between Printer Connection Modes](#) on page 63.

Before You Begin Make sure the printer is on and connected to your PC or handheld device. If you are printing in infrared mode, make sure that the infrared port on the mobile device is aimed directly at the infrared port on the printer when you tap the Label button. Also make sure that the device and the printer are no more than two feet (60 centimeters) apart.

Steps to Take In the Collect window,

- 1 Do one of the following:

To print ...	Do this ...
Regular labels	Tap or click Labels . The required number of labels print for each selected container and accession.
Temporary labels	Tap or click Temp . One temporary label prints for each selected accession.

- 2 Affix the labels to the appropriate containers.

Rescheduling, Crediting, and Adding Tests or Test Comments

When performing specimen collections, you can reschedule, credit, or add tests, or add a comment to a test.

Your ability to perform these tasks depends on the types of security you are assigned in Sunquest Laboratory. If you do not have security to perform a task, the command for that task is unavailable.

These tasks can be performed on only one accession at a time. If you select more than one accession number, these commands are not available.

For more information, see ...	
Rescheduling Tests	52
Crediting Tests	53
Adding Tests to an Existing Order	55
Adding Test Comments	57

Rescheduling Tests

Description Use this procedure to reschedule one or more tests for a patient. Rescheduled tests can appear on future collection lists.

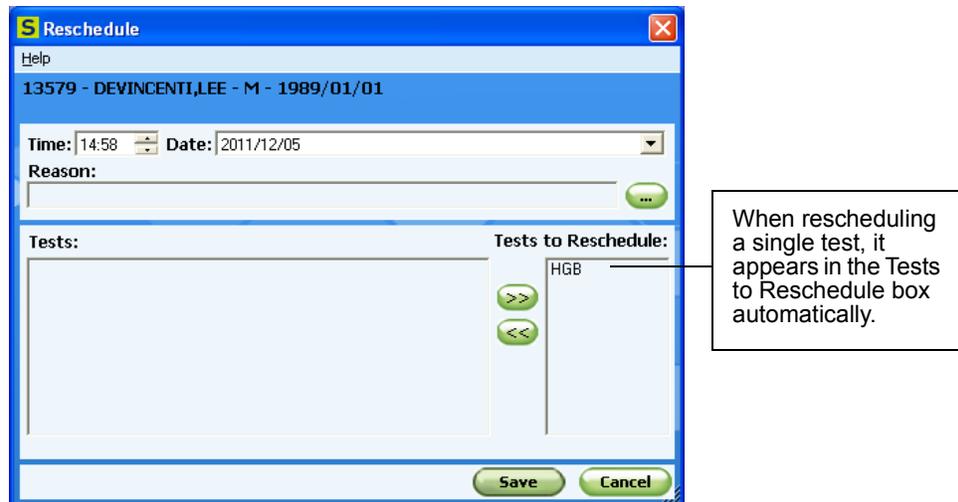
You Need to Know You cannot reschedule tests that have been credited in Sunquest Laboratory.

Steps to Take In the Collect window,

- 1 To specify whether to reschedule an accession or a test, do one of the following:

To reschedule ...	Do this ...
An accession	<ol style="list-style-type: none"> 1 Tap or click the accession for which to reschedule tests. The accession is highlighted. 2 On the Edit menu, tap or click Reschedule. The Reschedule window opens, with the current date and time displayed and all tests in the accession listed in the Tests box.
A single test	<ol style="list-style-type: none"> 1 Tap or click the accession containing the test to reschedule. The accession is highlighted. 2 Tap or click the test to reschedule. The test is highlighted. 3 On the Edit menu, tap or click Reschedule. The Reschedule window opens, with current date and time displayed and the test listed in the Tests to Reschedule box.

The following illustration shows the Reschedule window with a single test selected to reschedule:



- 2 In the **Time** box, type the time at which to reschedule the test, or use the arrows to adjust the time.

- 3 In the **Date** box, type the date on which to reschedule the test, or tap or click the arrow and select the date from the calendar.
- 4 To specify the reason for rescheduling, in the **Reason** box, do one or more of the following:

To ...	Do this ...
Enter a reason code manually.	Type the reason code that applies.
Search for a reason code.	Tap or click  to search for codes.

Note When rescheduling multiple tests, the reason code you enter applies to all of the tests. To apply a different reason code to individual tests, reschedule each test separately.

- 5 To specify which tests are to be rescheduled, do one or more of the following:

To ...	Do this ...
Reschedule a single test.	In the Tests box, tap or click the test to be rescheduled. The test moves to the Tests to Reschedule box.
Leave a test at its currently scheduled date and time.	In the Tests to Reschedule box, tap or click the test that you don't want to reschedule. The test moves to the Tests box.
Reschedule all tests.	Tap or click  . All tests in the Test box move to the Tests to Reschedule box.
Leave all tests at their currently scheduled date and time.	Tap or click  . All tests in the Tests to Reschedule box move to the Tests box.

- 6 Tap or click **Save**. A status bar shows the progress of the reschedule data as it uploads to Sunquest Laboratory. The rescheduled test appears at the new time in the Collect window or, if the rescheduled time falls outside your configured time frame for displaying pending orders, the test no longer displays in the Collect window. If there are no more accessions to display for the patient in the Collect window, the window closes.

Crediting Tests

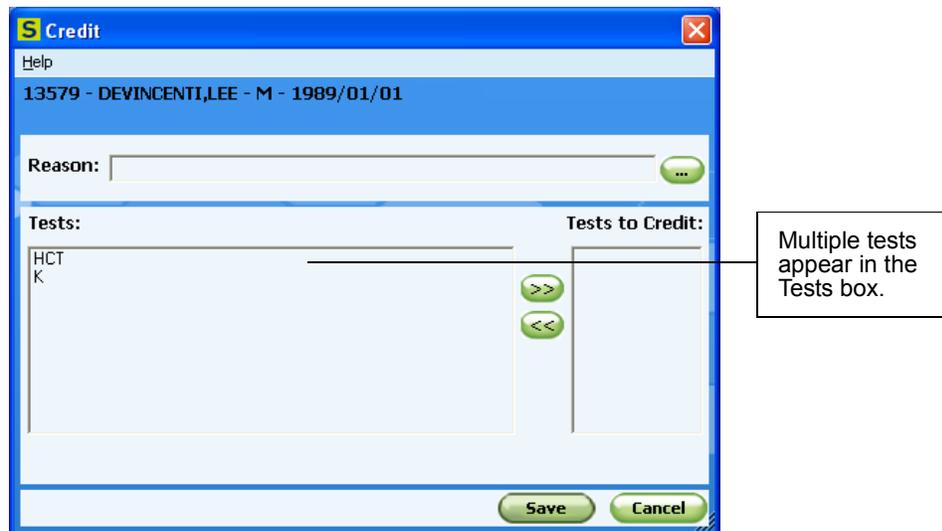
Description Use this procedure to credit tests that are no longer required for a patient.

Steps to Take In the Collect window,

- 1 To specify whether to credit an accession or a test, do one of the following:

To credit ...	Do this ...
An accession	<ol style="list-style-type: none"> 1 Tap or click the accession to credit. The accession is highlighted. 2 On the Edit menu, tap or click Credit. The Credit window opens, with all tests in the accession listed in the Tests box.
A single test	<ol style="list-style-type: none"> 1 Tap or click the accession with the test to credit. The accession is highlighted. 2 Tap or click the test to credit. The test is highlighted. 3 On the Edit menu, tap or click Credit. The Credit window opens, with the test listed in the Tests to Credit box.

The following illustration shows the Credit window as it appears when it first opens for an accession with multiple tests.



If you select a test that has already been credited (remove results) in Sunquest Laboratory, the message “Order status is credited—cannot credit” appears; tap or click **OK** to return to the Collect window. If you select a test that has already been credited (retain results) in Sunquest Laboratory, the message “Order status is credited/pending—cannot credit” appears; tap or click **OK** to return to the Collect window.

- 2 To specify the reason the tests are being credited, in the **Reason** box, do one or more of the following:

To ...	Do this ...
Enter reason codes manually.	Type one or more reason codes, separated by hyphens.
Search for reason codes.	Tap or click  to search for codes.
Enter free text comments.	Type a semicolon (;) followed by your free text comments. Separate free text comments from other entries by commas.

Note When crediting multiple tests, the reason codes apply to all of the tests. To apply different reason codes to individual tests, credit each test separately.

- 3 To specify the tests to be credited, do one or more of the following:

To ...	Do this ...
Credit a single test.	In the Tests box, tap or click the test to be credited. The test moves to the Tests to Credit box.
Leave a test uncredited.	In the Tests to Credit box, tap or click the test to be credited. The test moves to the Tests box.
Credit all tests.	Tap or click  . All tests in the Test box moves to the Tests to Credit box.
Leave all tests uncredited.	Tap or click  . All tests in the Test to Credit box moves to the Tests box.

- 4 Tap or click **Save**. A status bar shows the progress of the credit data as it uploads to Sunquest Laboratory. If all tests in the accession have been credited, the accession is removed from the Collect window. If there are no more accessions to display for the patient in the Collect window, the window closes.

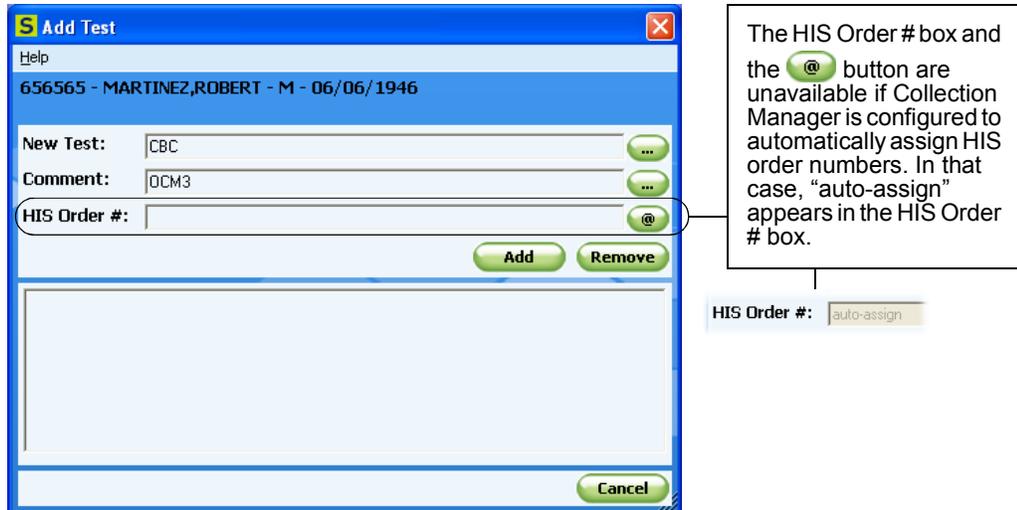
Adding Tests to an Existing Order

Description Use this procedure to add one or more tests to an accession for a specimen collection.

You Need to Know The option to specify an HIS order number is available only if Collection Manager is not configured to assign HIS order numbers automatically. If Collection Manager is configured to assign HIS order numbers automatically, “auto-assign” appears in the HIS Order # box. For more information about automatically assigning HIS order numbers to all tests added to accessions, see [Setting Workflow Parameters](#) on page 65 in the *Sunquest Collection Manager Administrator's Guide*.

Steps to Take In the Collect window,

- 1 Select the accession to which to add a test.
- 2 On the **Edit** menu, tap or click **Add Test**. The Add Test window opens.



- 3 In the **New Test** box, type the test code, or tap or click to search for the code. If you select a test, battery, or package on an accession that was previously credited, an error message appears indicating this is a duplicate order; tap or click **OK** to return to the Add Test window.
- 4 To enter an optional comment, in the **Comment** box, do any of the following:

To ...	Do this ...
Enter comment codes manually.	Type one or more comment codes, separated by hyphens.
Search for comment codes.	Tap or click to search for codes.
Enter free text comments.	Type a semicolon (;) followed by your free text comments. Separate free text comments from other entries with commas.

- 5 If an HIS order number is required and Collection Manager is not configured to auto-assign HIS numbers, do one of the following:

To ...	Do this ...
Enter the HIS order number manually.	In the HIS Order # box, type the HIS order number.
Have Sunquest Laboratory automatically assign an HIS order number.	Tap or click . The word auto-assign appears in the box and Sunquest Laboratory assigns the next available HIS order number to the new test when it is uploaded.

- 6 Tap or click **Add**. A status bar shows the progress of the data as it uploads to Sunquest Laboratory. The Collect window opens and the test you added appears under the accession.
- 7 Repeat steps 1 through 6 for each test you need to add.
- 8 If the test you added requires a specimen collection, collect the specimen, and then click **Labels** to print a label for it. For more information, see [Collecting Specimens for Pending Sunquest Laboratory Orders](#) on page 46.

Adding Test Comments

Description Use this procedure to add comments to an accession or to a single test.

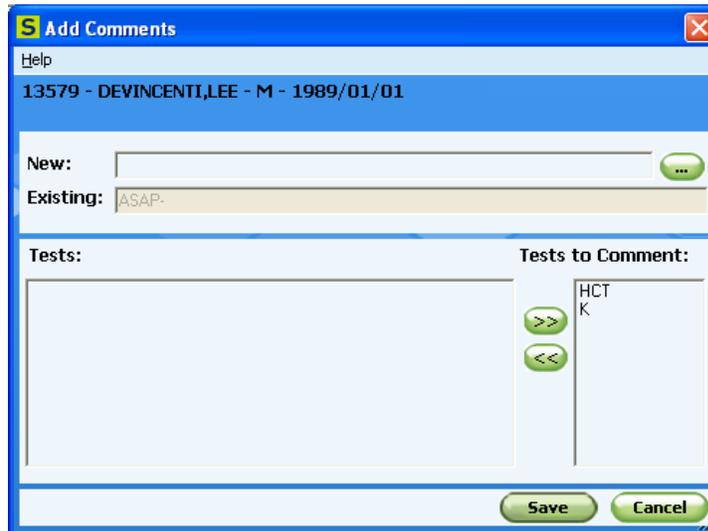
You Need to Know You cannot modify or delete comments that were entered in Sunquest Laboratory. These comments appear in the Existing box in the Add Comments window.

Steps to Take In the Collect window,

- 1 To specify whether to add comments to an accession or a test, do one of the following:

To add comments to ...	Do this ...
An accession	<ol style="list-style-type: none"> 1 Tap or click the accession to which to add comments. The accession is highlighted. 2 On the Edit menu, tap or click Add Comment. The Add Comments window opens, with all tests in the accession listed in the Tests to Comment box.
A single test	<ol style="list-style-type: none"> 1 Tap or click the accession with the test to which to add comments. The accession is highlighted. 2 Tap or click the test to which to add comments. The test is highlighted. 3 On the Edit menu, tap or click Add Comment. The Add Comments window opens, with the test listed in the Tests to Comment box.

The following illustration shows the Add Comments window for an accession with two tests, and with an existing comment that was entered by the laboratory.



- 2 To specify the comments to add, in the **New** box, do one of the following:

To ...	Do this ...
Enter comment codes manually.	Type one or more comment codes, separated by hyphens.
Search for comment codes.	Tap or click  to search for codes.
Enter free text comments.	Type a semicolon (;) followed by your free text comments. Use commas to separate free text comments from other entries.

- 3 Tap or click **Save**. A status bar shows the progress of the data as it uploads to Sunquest Laboratory. The Collect window opens with the comments displayed under the test or accession, as applicable.

Printing Temporary Labels

You can print temporary labels for specimen containers that are not associated with a pending order in Sunquest Laboratory.

For more information, see ...

Printing Temporary Labels (Phlebotomist or Nurse)	59
Printing Temporary Labels (ER Nurse)	60

Printing Temporary Labels (Phlebotomist or Nurse)

Description Phlebotomists and nurses can print temporary labels when:

- Collection Manager finds a patient but cannot find any collection orders for the patient in Sunquest Laboratory.
- Collection Manager cannot find a patient in Sunquest Laboratory.

The following illustration shows the Temporary Label window when patient information is found in Sunquest Laboratory:

If you modify information in the Loc, Name, DOB, or Sex boxes, the changes are printed on temporary labels but not updated in Sunquest Laboratory.

If the patient is not found in Sunquest Laboratory, by default the Loc and Name boxes are empty, the DOB box has the current date, and the Sex box has M. You can enter the correct information manually if you have it.

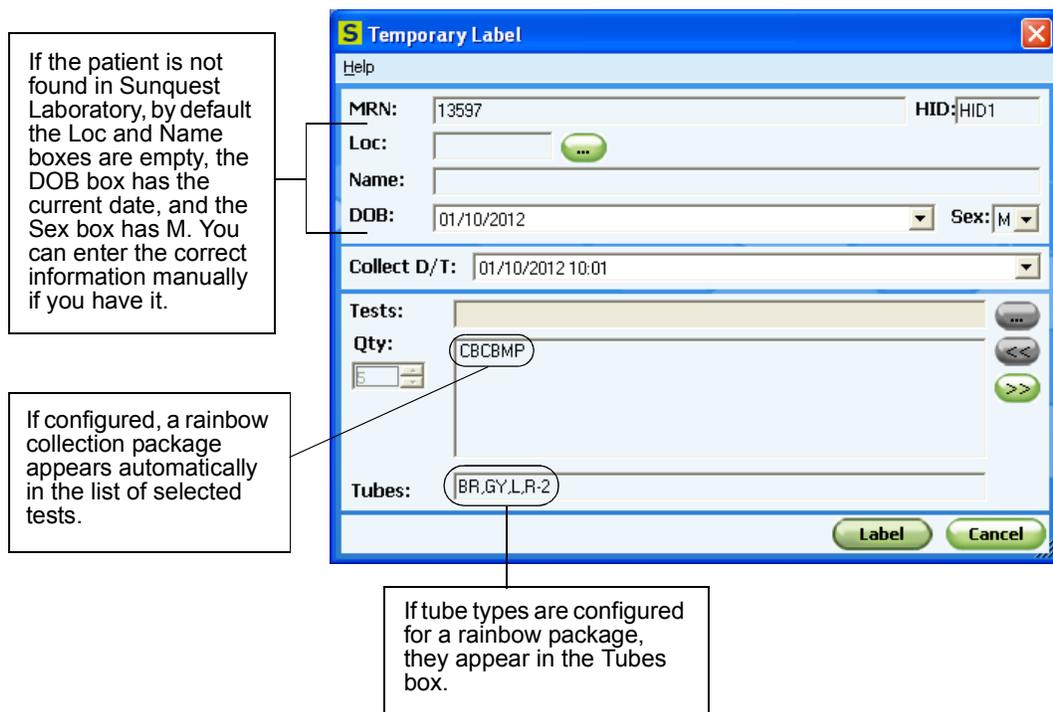
You Need to Know You can enter or change patient information in the Temporary Label window, but the changes you make only print on the labels; the patient information is not updated in Sunquest Laboratory.

Before You Begin Identify the patient. For more information, see [Identifying Patients \(Phlebotomist or Nurse\)](#) on page 43.

Steps to Take In the Temporary Label window,

- 1 To enter or change demographic information for the patient:
 - a In the **Loc/Rm** or **Rm** box, type the code for the location or room, or tap or click  to search for the code.
 - b In the **Name** box, type the patient's last name, a comma (,), and then the patient's first name.
 - c In the **DOB** box, type the patient's date of birth, or tap or click the drop-down arrow button to open the calendar and select a date.

The following illustration shows the Temporary Label window when patient information is not found in Sunquest Laboratory:



You Need to Know You can enter or change patient information in the Temporary Label window, but the changes you make only print on the labels; the patient information is not updated in Sunquest Laboratory.

If a rainbow package appears, you cannot add tests. If you want to print temporary labels for a different set of tests, you must first remove the rainbow package that appears and then add the appropriate tests.

If the rainbow package is configured with either tube types or the number of labels to print, the number of labels that appears in the Qty box cannot be changed in the Temporary Label window.

Before You Begin Identify the patient. For more information, see [Identifying Patients \(ER Nurse\)](#) on page 45.

Steps to Take In the Temporary Label window,

- 1 To enter or change demographic information for the patient:
 - a In the **Loc/Rm** or **Rm** box, type the code for the location or room, or tap or click  to search for the code.
 - b In the **Name** box, type the patient's last name, a comma (,), and then the patient's first name.

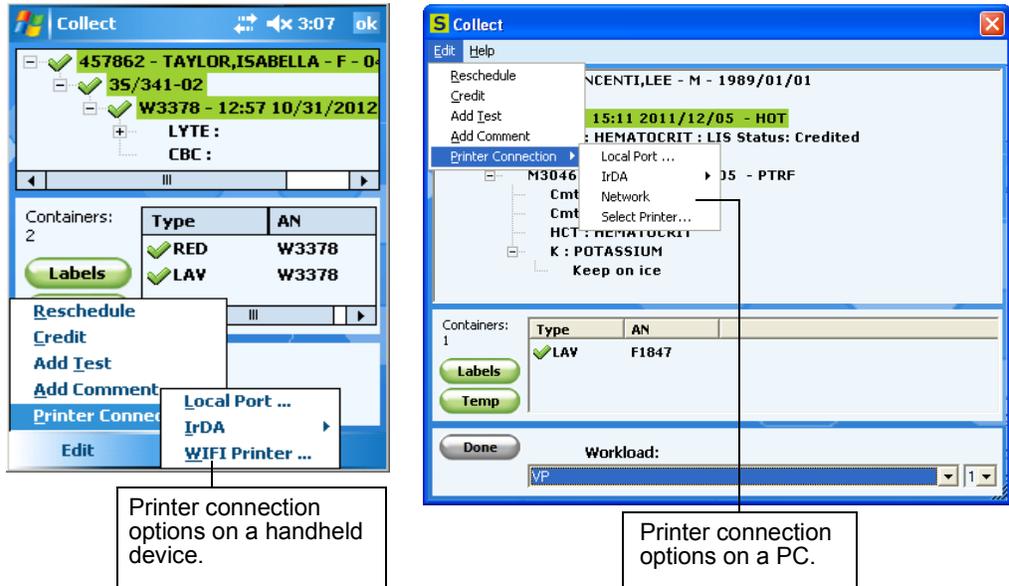
- c In the **DOB** box, type the patient's date of birth, or tap or click the drop-down arrow button to open the calendar and select a date.
 - d In the **Sex** list, enter **M** to indicate the patient is a male, enter **F** to indicate the patient is a female, or enter **U** to indicate the patient's sex is unknown.
- 2 To change the collection date and time, in the **Collect D/T** box, select the portion of the date or time you want to change and type the new value, or tap or click the drop-down arrow button to select a new date from a calendar. The time must be entered by typing it.
 - 3 In the **Tests** boxes, do one of the following:

If ...	Then ...
The list of selected tests is pre-filled with a rainbow package and you want to print labels for it.	<ul style="list-style-type: none"> • Go to step 5.
The list of selected tests is pre-filled with a rainbow package and you want to print labels for a different test or tests.	<ol style="list-style-type: none"> 1 Select the rainbow test package, and then tap or click  to remove it from the list. 2 In the first Tests box, type a test code, or tap or click  to search for a code. 3 Tap or click  to add the test to the list. The test moves to the second Tests box. 4 Repeat steps 2 and 3 for each test code you want to add to the label.
The Tests boxes are empty	<ol style="list-style-type: none"> 1 In the first Tests box, type a test code, or tap or click  to search for a code. 2 Tap or click  to add the test to the list. The test moves to the second Tests box. 3 Repeat steps 1 and 2 for each test code you want to add to the label.

- 4 If available, in the **Qty** box, enter the number of temporary labels you want to print.
- 5 Tap or click **Label**. Temporary labels print with the information from the Temporary Label window.

Switching Between Printer Connection Modes

Description Use this procedure to change the printer connection mode used to print labels for specimen containers. Depending on the type of device, Collection Manager supports these types of communication with label printers: cabled, WiFi, infrared (IrDA), Bluetooth, and Windows system printer. The following illustrations show the printer connection options that are available on a handheld device and on a PC.



You Need to Know When you change the printer communication mode in the Collect window, the mode you select remains in effect on that device until the next time it is changed or Collection Manager is restarted. When Collection Manager is restarted, the connection mode reverts to the setting that is configured in the Labels window. For information about configuring the communication mode, see [Configuring Label Printing for Collection Manager](#) on page 72 in the *Sunquest Collection Manager Administrator's Guide*.

Steps to Take In the Collect window,

- 1 On the **Edit** menu, tap or click **Printer Connection**. The printer connection menu opens.
- 2 Do one of the following:

To print using ...	Do this ...
A local port (handheld device or PC)	<ol style="list-style-type: none"> 1 Tap or click Local Port. The Select COMPort window opens. 2 Select a local port from the drop-down list. 3 Tap or click OK.

To print using ...	Do this ...
Infrared technology (handheld device or PC)	<ol style="list-style-type: none"> 1 Tap or click IrDA. Two additional options appear, LPT and 9WIRE. 2 Select the appropriate IrDA transport for your device. Your device forms a connection with an infrared-enabled printer when you align the infrared ports on your mobile device or PC and printer.
A network printer (PC only)	<ol style="list-style-type: none"> 1 Click Network. The Select Printer window opens. 2 In the folder directories, navigate to the folder containing the printer to which you want to connect. 3 Select the printer name. The printer appears in the Printer Name box. <p>Note <i>Instead of searching for a printer, you can type the printer name using the universal naming convention (UNC): \\PCName\ShareName\PrinterName.</i></p> <ol style="list-style-type: none"> 4 Click OK.
A Windows printer (PC only)	<ol style="list-style-type: none"> 1 Click Select Printer. The Print window opens. 2 Select the Generic/Text Only printer. This printer must be installed in Microsoft Windows; for more information, see the <i>Collection Manager Installation Guide</i>. 3 Click OK.
A Wi-Fi printer (This option only appears when Collection Manager is installed on a handheld device.)	<ol style="list-style-type: none"> 1 Tap Connection, and then tap WIFI Printer. The Set Wi-Fi Printer window opens. 2 In the IP Address box, type the address of the wireless printer. 3 In the Port box, type the listening port on the wireless printer. 4 Tap OK.

Searching for Codes

Several windows in Collection Manager require that you enter codes that have been defined in Sunquest Laboratory. You may enter these codes manually, or search for and select the codes. The code search feature provides an easy means for looking up codes throughout Collection Manager.

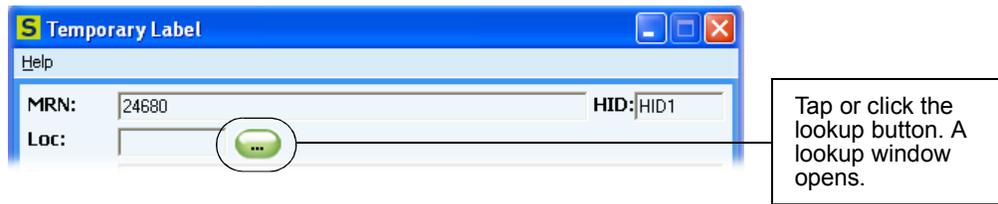
For more information, see ...

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About the Lookup Button

Whenever a data entry box requires entry of a code, you can tap or click the lookup button () adjacent to it. A Lookup window opens, allowing you to enter your search criteria and to select one or more codes from a list of available codes.

The following illustration shows a lookup button for a Location code.

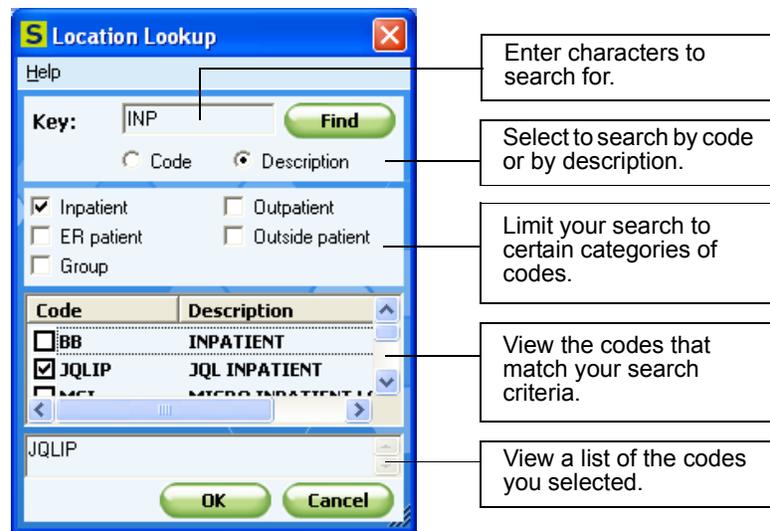


Searching for and Selecting Codes

Description Use this procedure to search for and select codes.

The categories to which you can limit a search vary, depending on the type of code you are searching for. Some codes do not have categories.

The way you use lookup windows is similar for any type of code you are looking up. The following illustration shows an example of the Location Lookup window.



Open a lookup window by tapping or clicking next to the box for which you want to search for and select codes.

Steps to Take In the Lookup window,

- 1 Do one of the following:

To search for the code by ...	Do this ...
The initial character(s) of the code	<ol style="list-style-type: none"> 1 In the <i>Key</i> box, type one or more alphanumeric characters that the code starts with. 2 Tap or click <i>Code</i>.

To search for the code by ...	Do this ...
Part of the code's description	<ol style="list-style-type: none"> 1 In the Key box, type three or more alphanumeric characters that the description contains. 2 Tap or click Description.

- 2 Select one or more categories to include in the search, if available and appropriate.

Note If no categories are selected, Collection Manager searches all categories.

- 3 Tap or click **Find**. The codes or descriptions that match your search criteria appear in the code list.
- 4 Scroll through the list of codes and select the code or codes to use.
- 5 Tap or click **OK**. The code selection appears in the appropriate box.

Entering Manual Entry Codes

Description The preferred method for entering patient identification is scanning. Occasionally you must enter data manually. Use this procedure to record the reason you entered it manually if your user configuration requires you to do so.



Steps to Take To enter a reason for manual data entry,

- 1 Tap or click **M** next to the **Medical Record Number** or **Account** box in the Patient Id window. The Manual Entry window opens.



- 2 Tap or click the check box next to each manual entry code you want to use, and then tap or click **OK**. The code selection is recorded and the Manual Entry window closes.

Ending a Collection Manager Session

Description Use this procedure to end a session of Collection Manager.

Caution Failure to charge a mobile device that uses batteries when it is not in use may result in a total discharge of battery power and the loss of the Collection Manager database on your device if it is not installed in persistent memory. If this occurs, contact your system administrator.

Steps to Take On the device desktop,

- 1 Close all Collection Manager windows.
- 2 When a message window appears with the prompt **Exit application?**, tap or click **Yes**.
- 3 If your mobile device uses batteries, dock or cradle the device or connect it to an AC adaptor, as appropriate, to ensure that the batteries for the device are recharged. For more information, see your mobile device manufacturer's documentation.

