

TrakCare – Requesting a Phlebotomy clinic appointment and placing Lab requests

This User Guide is for the Phlebotomy workflow process and shows how to request a Phlebotomy clinic appointment and Lab tests to be collected at the Phlebotomy clinic.

Requests placed either from clinics or when vetting a referral will be associated to an Outpatient episode.

The Responsible Clinician at the time of the request will be used as search criteria when using the Unsigned Results List for Outpatient results therefore it is vital that this is correct before selecting any order items.

Failure to follow the correct process impacts on **both** the specimen collection at the Phlebotomy Clinic and the management of results.

Important: If the Labs tests are not available on TrakCare do not request a Phlebotomy Clinic appointment. Please follow your current processes.

IMPORTANT:

For the Phlebotomy workflow to work correctly please ensure that:

1. The Phlebotomy Referral and the Lab tests are requested at the same time using the correct **START DATE** on the **NEW REQUEST** screen
 - a) This will place the Phlebotomy Clinic on the Health Records worklist 3 weeks before the appointment is required, allowing time for the appointment to be made, the patient to attend the Phlebotomy Clinic and the results to be issued
 - b) It reduces the risk of the patient not attending the Phlebotomy Clinic or of the Phlebotomy Clinic and the clinical consultation becoming unaligned
 - c) This reduces the risk of the Lab tests being incorrectly 'collected' prior to the Phlebotomy Clinic and also makes it easier for the Phlebotomy Clinic staff to identify which specimens are to be taken as they look for requests with a Start Date close to the Clinic date

If the Phlebotomy Clinic and Lab tests have not been requested correctly i.e. selected current date instead of future date please refer to the information given in [Process 3](#) in this document

2. **All** Lab tests are requested on TrakCare at the same time; failure to do so 'breaks' the aggregation of specimens which means that
 - a) the patient may have more blood taken than necessary
 - b) the specimens may not be 'collected' on TrakCare correctly and the results will not be available as expected

If additional Lab tests are required please refer to the information given in [Process 4](#) in this document.

3. If the patient fails to attend the Phlebotomy Clinic and is to be reappointed please refer to the information in [Process 5](#) in this document

Process 1: Requesting from Clinics

- Use when the patient has an **existing appointment** for the **correct Specialty and Consultant**
 - **Failure to select the correct appointment has a direct impact on results management**

1. Log onto TrakCare using your own User ID/Password

- Select Clinics
- Select the patient from the appropriate Clinic

Clinic List

Care Provider	Description	Clinic Location	Day	Date	Time From	Time To	Appointments Booked	Over bookings	Vacant	Attended	Did Not Attend	Message	Add/Edit Message	Reason for Variance
Dr Joanne Lindsay1	STJLCA5-CARD ACH DR J LINDSAY WEDNESDAY AM	Clinic E First Floor Stobhill Ambulatory Care Hospital	Wednesday	03/06/2020	09:15	11:00	0		7	0				
Dr Joanne Lindsay1	STJLCA9S2-CARD ACH DR J LINDSAY FRIDAY AM 1ST WEEK ONLY	Kerry Jane Hogg Heart Unit First Floor Stobhill Ambulatory Care Hospital	Friday	05/06/2020	11:00	11:40	4		0	0				

VBResEffDateSession.List: 0.023749 (secs), 75679 (lines), 8812 (globals)

Session Appointment List

Date: 10/06/2020 << Session >> Session Description: STJLCA5-CARD ACH DR J LINDSAY WEDNESDAY AM Resource: Dr Joanne Lindsay1

Search for CHI: << Day >> Session Message: Clinic CP Seeing Patients: Day

Session: Both 09:15 11:00 AM STJLCA5-CARD ACH DR J LINDSAY WEDNESDAY Multi Slot Override

Hide Overridden Closed Slots

Select	Icon Profile	Time	CHI	Surname	Patient Name	DOB	Gender	Appointment Type	Slot Services	Status	Arrive	Remarks	Appt Offers	Transport	Outcom
<input checked="" type="checkbox"/>		09:15	TJ81001984	Dummyspatient	Brenda	01/04/1937	Male	G N URG CARDIO	Slots=0	Booked	X	Accepted			

2. Select **New Request** menu item

- If the Phlebotomy Clinic appointment is required within the next 1-2 weeks, leave the **START DATE** as current date; for all other appointments please refer to information provided below and change as appropriate (T = Today i.e. current date; T+21 =will enter a date for 3 weeks from current date):
 - In 4 weeks – change Start Date to T+7
 - In 6 weeks – change Start Date to T+21
 - In 8 weeks – change Start Date to T+35
 - In 3 months – change Start Date to T+63
 - In 6 months – change Start Date to T+147
 - In 1 year – change Start Date to T+343
- If the Clinic Consultant is a generic Care Provider please select the correct **Responsible Clinician before** selecting any orders
- **Request the Phlebotomy item first** as important information regarding the correct requesting process is provided

a. To request the Phlebotomy appointment:

- Select **Other** tab
- Select **Phlebotomy Referral** either from Favourite orders or by entering Phleb at the Order Item search and select using the spyglass

- Please wait for the Information pop up screen to present providing guidance on how to request both the Phlebotomy Referral and the Labs tests; a link to the User Guide is also available
 - The **Lab tests must also be requested**, not just the Phlebotomy Referral
- Follow the instructions if a **future** Phlebotomy Clinic appointment is required; failure to do so means that the specimens may not be taken at the right time
- Select **UPDATE** on this screen to continue

Important - please read the information on this page [Click here to access the User Guide](#)

Currently the **Phlebotomy Clinics** are **ONLY** for patients who:

- * Require Lab tests when Vetting the initial Referral
- * Have 'virtual' clinic consultations
- * Require bloods subsequent to clinical consultation

Please **DO NOT** refer for Phlebotomy if the patient requires:

- * Tests that are not currently listed on TrakCare
- * Specimens other than blood e.g. CSF
- * Complex tests e.g. must lie down for 1 hour prior to specimen being taken

Continue with your current process for all other patients **Continue with your current processes for taking these specimens**

* If **appropriate**, continue with this referral and request the **Lab tests**
 * It is important to request **all Lab tests correctly and at the same time**

* **Only** Urine specimens in **Universal Containers** can be handed in to the Phlebotomy Clinic.
 * The Urine test must be requested (not 'collected') and the container **sent out** to the patient by the **Service** in advance of the Phlebotomy Clinic

If the Phlebotomy appointment is required:

- * **Immediately:** leave **START DATE** as **current Date**
- * In **4 weeks:** change **START DATE** to T+7
- * In **6 weeks:** change **START DATE** to T+21
- * In **8 weeks:** change **START DATE** to T+35
- * In **3 months:** change **START DATE** to T+63
- * In **6 months:** change **START DATE** to T+147
- * In **1 year:** change **START DATE** to T+343

* T = Today/current date; e.g. T+7 = 1 week

IMPORTANT: The **START DATE** on the **NEW REQUEST** screen must be **CHANGED PRIOR** to selecting **BOTH** the **Phlebotomy Referral** and the **Laboratory** requests

* This referral will be listed on the Health Records workbench **3 weeks** prior to when the **Phlebotomy Clinic appointment** is due, allowing sufficient time for the patient to be appointed and the specimens taken prior to the clinical consultation

* At the same time the Lab requests will also be listed for collection by the Phlebotomy Clinic

[Update](#)

- The Order Details screen will present
 - Do not enter or edit any information on this screen
 - Select Update to return to the New Request screen

- On the New Request screen - if a **future appointment** is required and the **START DATE** wasn't changed at the start of the requesting process:
 - Delete any Lab tests and/or the Phlebotomy Referral from the 'Shopping basket'
 - Change the **START DATE** to the correct date using T+NN as above
 - Select the Phlebotomy Referral and Labs tests and continue with the requests as per normal processes
 - ✓ **Important:** The **START DATE** must be changed **PRIOR** to selecting the Phlebotomy Referral and Labs test otherwise the specimen(s) will not be taken at the right time

The screenshot shows a web interface with a top navigation bar containing tabs for 'Labs - Adult', 'Labs - Child', 'Imaging', 'Cardiology', 'HaN & Handover', 'Other', 'Order Sets - Adult', and 'Order Sets - Child'. Below the navigation bar, there are several input fields. A red box highlights the 'Start Date' field, which contains the text '+2'. Below it, the 'Start Time' field contains '14:34'. The 'Requested By' field contains 'Dr Pauline Hunter'. On the left side, there is a list of services including 'Full Lung Function Test (PFT)', 'OT referral for assessment', 'Physiotherapy referral', and 'Urgent Chest Physio'.

b. To request Lab tests:

- Select the appropriate Labs tab
- Ensure the **Start Date/Time** have already been changed if appropriate to do so as per the above information
- Ensure the **Specimen Collected** box is **unticked at all times**
- Select Lab tests as per normal processes either from Favourite orders or by entering a partial search and using the spyglass
- Select Update to proceed to the Questions page

The screenshot shows a more detailed view of the 'New Request' screen. On the left, there is a 'Presenting Complaint' section with a 'New' button, a 'Diagnosis' section with a 'New' button, and a 'Request Profile' section with a 'This Episode Requests' button. Below these is a 'Tabular Result Profile' section. The main area contains a list of lab tests, including 'ANA (anti - nuclear and centron Sample in Blood Culture Bottles', 'Blood Film', 'Bone Profile', 'Chol / Triglyceride', 'Coagulation screen', 'CRP', 'D - Dimer', 'Hep C antibody screen', 'Immunoglobulins (without elect INP', 'Lactate (Glasgow only)', 'LFT', 'Liver abs (mitochondrial , smoo', 'MRSA Screen', 'ESR', 'Faeces Bacterial Culture', 'Ferritin', 'Folate', 'Full Blood Count', 'Glucose', 'HbA1c', 'Lipid profile (inc. HDL)', 'Hep B screen - HBsAg - current', 'SARS-Cov-2 (OP use) (COVID-1 Protein electrophoresis & immun', 'Parathyroid Hormone Levels (PTH)', 'Reticulocytes', 'Rheumatoid Factor', 'Thyroid function tests', 'Urea and Electrolytes', 'Urine Bence Jones Protein (BJP', and 'Urine culture'. There is a 'Specimen Collected' checkbox which is currently checked, with a red 'X' over it and the text 'TICK IF COLLECTING NOW'. Below this is a 'Collection Date' field, a 'Collection Time' field, and a 'Sub Category' field. At the bottom, there is a table with columns 'Item', 'Priority', 'Start Date', 'Receiving Location', 'Delete', and 'Select'. The table contains the following items:

Item	Priority	Start Date	Receiving Location	Delete	Select
CRP (Blood - Yellow)	Routine	10/08/2020 14:34	GRI Biochemistry Laboratory	<input type="checkbox"/>	<input type="checkbox"/>
Urea and Electrolytes (Blood - Yellow)	Routine	10/08/2020 14:34	GRI Biochemistry Laboratory	<input type="checkbox"/>	<input type="checkbox"/>
LFT (Blood - Yellow)	Routine	10/08/2020 14:34	GRI Biochemistry Laboratory	<input type="checkbox"/>	<input type="checkbox"/>
Full Blood Count (EDTA)	Routine	10/08/2020 14:34	GRI Haematology	<input type="checkbox"/>	<input type="checkbox"/>
Phlebotomy Referral	Routine	10/08/2020 14:34	Phlebotomy Referral	<input type="checkbox"/>	<input type="checkbox"/>

- Ensure the **Specimen Collection Date/Time** are **blank**; if not, exit by selecting the New Request tab and start again
 - 'Collecting' the specimen prints the Request form now and sends the electronic order to the Lab therefore will not be available when the patient attends the Phlebotomy clinic
- If the specimen is to be taken prior to the next clinical consultation you will need to provide the Speciality
- If the specimen need to be taken at a specific time of day you will be asked to state the time
- Please **provide your email address and a contact phone number** (preferably mobile) in the Requestor's contact details box as this will assist Health Records or the Phlebotomy Clinic if they need to contact you regarding the patient

Request Item	Requesting Clinician	Start Date	Start Time	Priority	Specimen/s	Specimen Collection Time	Specimen Collection Date	Delete
CRP	Dr Pauline Hunter	10/08/2020	14:34	Routine	Blood - Yellow			
Urea and Electrolytes	Dr Pauline Hunter	10/08/2020	14:34	Routine	Blood - Yellow			
LFT	Dr Pauline Hunter	10/08/2020	14:34	Routine	Blood - Yellow			
Full Blood Count	Dr Pauline Hunter	10/08/2020	14:34	Routine	EDTA			
Phlebotomy Referral	Dr Pauline Hunter	10/08/2020	14:34	Routine				

OEOrder:Question 0.004943 (secs), 20376 (lines), 519 (globals)

Items	Question	Answer
CRP, Full Blood Count, LFT, Urea and Electrolytes	Reason for Biochemistry/Haematology/Immunology/Neuroimmunology request	Routine clinic bloods
Phlebotomy Referral	Please ensure you have requested (but not 'collected') all of the correct Lab tests for the correct START DATE as per the guidance. If not, please exit and start again	
Phlebotomy Referral	Has the specimen to be taken immediately or prior to next consultation?	Prior to next consultation
Phlebotomy Referral	Which Speciality appointment is the Phlebotomy Clinic appointment to be aligned to	Cardiology
Phlebotomy Referral	Does the specimen need to be taken at a specific time of day for accurate analysis (e.g. fasting sample, hormone levels) or for transport reasons (e.g. Quantiferon Gold at IRH to arrive at GRI by 12nd)?	Yes
Phlebotomy Referral	Specify time that the specimen is to be taken as this will inform the Phlebotomy Clinic appointment time:	9am
Phlebotomy Referral	Please provide your email address and a contact number (preferably mobile) in case Health Records or the Phlebotomy Clinic need to contact you	Pauline.bowes@anymail.com, 07111111111
Phlebotomy Referral	Requestor's contact details	

OEOrder:Question 0.004943 (secs), 20376 (lines), 519 (globals)

User: Pauline Hunter

Password: []

- File orders as per normal processes
- The Phlebotomy Referral will be sent to a Workbench for Health Records to make the appointment for the Phlebotomy clinic
- The Lab request will be placed on the Specimen Collection Worklist to be collected when the patient attends the Phlebotomy clinic

Process 2: Requesting from Vetting

- Use when vetting the referral or if the patient does not have an existing appointment
 - **Failure to select the correct referral has a direct impact on results management**
1. Log onto TrakCare using your own User ID/Password
- Select Vetting List or Vet Single Patient
 - Select correct referral (correct Speciality and Hospital) by clicking on the Speciality hyperlink

Initial	TJ81001984	Dummpatient	Brenda	83	0 (0)	26/08/2020	Glasgow Royal Infirmary	General Medicine	URGENT	General Medicine
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- **Do NOT request from Vetting if the Hospital is listed as GGC as this is not set up to support requesting**

<input type="checkbox"/>	1010207986681	Initial	TJ123456	Dummpatient	Ross	98 (14)	13/03/2020	GGC	Cardiology	Nurse Helena Lannigan	URGENT	URG Rapid Access
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- To request tests select **Launch Request Screen**
- Complete vetting as per normal processes
- Select Update

UCPN: 135005769679H

Referrer Priority: URGENT

Referral Source: General Practitioner

Pooled List: Yes

Portal Link: Add/View Documents

Launch Request Screen:

Vetting Information

Vetting Date: 03/06/2020

Vetted Priority: URGENT

Vetting Consultant:

Specialty: General Medicine

Vetting Outcome: General Medicine

Comments:

Specialty must be updated to assign to a Specialty clinic or for an onwa referral

- New Request screen will display
 - If a SCI Gateway referral is available it will be displayed alongside
- Request the Phlebotomy Referral and appropriate Lab tests as detailed in Process 1 remembering to change the **START DATE** prior to selecting the items if appropriate to do so
- If the Phlebotomy Clinic appointment is required within the next 1-2 weeks, leave the **START DATE** as current date; for all other appointments please refer to information provided below and change as appropriate
 - In 4 weeks – change Start Date to T+7
 - In 6 weeks – change Start Date to T+21
 - In 8 weeks – change Start Date to T+35
 - In 3 months – change Start Date to T+63
 - In 6 months – change Start Date to T+147
 - In 1 year – change Start Date to T+343
- The Responsible Clinician may be blank (populates if a Named Consultant has been added on the Vetting screen)
- Please select the correct **Responsible Clinician before** selecting any orders
- **Request the Phlebotomy item first** as important information regarding the correct requesting process is provided
- Note that the Specimen Collection box does not display when requesting from Vetting
- Follow the process as detailed in Process 1 above and file the requests

Process 3: if the Phlebotomy Referral and Lab tests haven't been requested correctly

- Health records staff may contact you if they have a query about the Phlebotomy Referral. Please note that they do not have any information or knowledge about the Lab requests.
- If the Phlebotomy Referral and Lab tests are required for a future date but were requested with a current Start Date:
 - Health Records will discontinue the original referral after discussing with you
 - A **new Phlebotomy Referral** and **Lab tests** will need to be requested following the correct process for selecting the correct **START DATE**
 - The original Lab requests need to be removed from the Specimens to be Collected workbench by 'collecting' the specimens; click [here](#) to follow the steps to 'collect' the specimen(s)
- If the patient attends the Phlebotomy Clinic but Lab tests have not been requested
 - Phlebotomy Clinic staff will attempt to contact you and ask you to request the appropriate Lab tests
 - Accept **START DATE** as current date and request the Lab tests (without 'collecting' the specimen)
 - Do not request the Phlebotomy Referral

Process 4: Requesting additional Lab tests

IMPORTANT:

For the Phlebotomy workflow to work correctly please ensure all Lab tests are requested on TrakCare at the same time. Failure to do so 'breaks' the aggregation of specimens which means that

- a) the patient may have more blood taken than necessary
- b) the specimens may not be 'collected' on TrakCare correctly and the results will not be available as expected

If additional Lab tests are required **do not** place another (duplicate) **Phlebotomy Referral** and enter information in the Requestor's Contact details re the addition of Lab tests as Phlebotomy Clinic staff do not process this referral and are therefore not aware of this information.

Correct process to follow:

1. 'Collect' the original orders from the TrakCare Specimens to be Collected workbench (this means that they are no longer available for collection by the Phlebotomy Clinic); click [here](#) to follow the steps to 'collect' the specimen(s)
2. Request **all** correct Lab requests as per the Phlebotomy Workflow process outlined above

Important: If you do not 'collect' the original orders and simply request the additional Lab tests, you cannot assume that the Phlebotomy Clinic staff will take all specimens and that all results will be available as expected.

Note, Phlebotomy Clinic staff are expecting the Lab tests to have been requested on the same date therefore may not be sure which specimens to collect if requested on different dates.

Explanation for the above process

TrakCare Specimen label production is controlled by:

1. The specimens associated to the selected tests
2. The Lab the tests are being sent to for analysis
3. If the tests are requested on TrakCare at the same time

Example: CRP, LFT, U&Es all have the same specimen

1. Request CRP, LFT, U&Es at the same time
 - The specimens aggregate and a single specimen label is produced = x1 specimen of blood from patient
 - The electronic order is sent to the Lab and matched to the specimen when it arrives
2. Request CRP & LFT at the same time, file then order U&Es
 - The CRP & LFT specimens aggregate and a single specimen label is produced
 - The U&Es was ordered at a different time therefore does not aggregate and produces a single specimen label

If Phlebotomy clinic staff 'collect' both specimens on TrakCare and print 2 labels:

- If x2 blood specimens taken from patient and both sent to Lab – means results will all be available
- If x1 blood specimen taken from patient and sent to Lab – not all results will be available as depends which specimen label is used
 - Labs scan the barcode on specimen label which matches the physical specimen to the electronic order; they do not search for any other outstanding orders for the patient and add them on to the scanned order
- If Phlebotomy clinic staff 'collect' only 1 of the specimens on TrakCare, print 1 label and take 1 blood specimen from the patient, not all results will be available as depends which specimen label is used

Process 5: Patient fails to attend Phlebotomy Clinic and is to be reappointed

There will be a requirement for a repeat Phlebotomy Clinic referral and Lab requests if either of the following scenarios occur and the decision is made to make a further appointment:

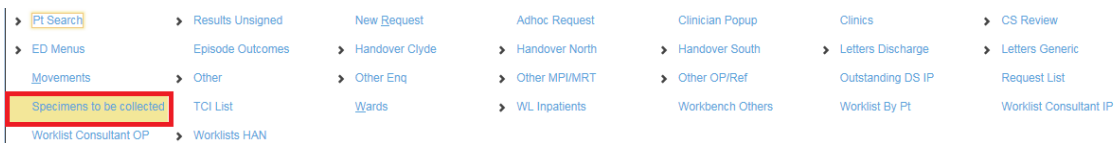
- Patient attends the Phlebotomy Clinic and the sample is not able to be taken
 - Follow the process previously outlined for requesting both the Phlebotomy referral and Lab tests
- Patient fails to attend the Phlebotomy Clinic and is to be reappointed
 - Request the Phlebotomy Referral by following the processes previously outlined above

- Check the TrakCare Clinical Record>Laboratory tab> SCGC Unresulted Lab requests tab and check that the original requests have not yet been 'collected' i.e. the Collection Date/Time/User are blank
 - ✓ If this is the case and the original orders were requested correctly (i.e. the Start Date is correct) and the patient is attending the Phlebotomy Clinic in the next few days it may be that you do not need to request new Lab tests
- Note, if the specimens have already been 'collected' then they must be re ordered following the processes outline above

To 'collect' the original specimens/orders:

1. Select the patient

- Copy the patient's CHI/TJ Number from your Clinic list
- Select **Specimens to be Collected** from the menu



2. The Start and End Collection Dates default to the current date

- Delete dates from both fields and leave blank
- Paste the CHI/TJ Number in the CHI field
- Clear down the entry in the Patient Ward/Specialty
- Select <Find>

- The patient and request(s) will be listed
 - Note, **other uncollected requests may be listed** therefore please ensure you are selecting the correct tests
 - Tips:
 - ✓ If requested from Vetting the Location at request will be a Vetting Location e.g. GRI Vetting
 - ✓ Look for requests with a recent Start Date and the appropriate Clinic Location, not a Ward

Icon Profile	Surname	Forename	Date of Birth	Episode No	Start Date	Start Time	Order Item	Specimen	Priority	Collected	Current Location	Patient Room	Patient Location at request
984	Dummpatient	Brenda	01/04/1937	00020000678	04/06/2020	14:06	Bone Profile Ferritin Folate Rheumatoid Factor	Blood - Yellow Blood - Yellow Blood - Yellow IMCHEM	Routine Routine Routine	+			GRI Vetting
984	Dummpatient	Brenda	01/04/1937	10008100123	10/03/2020	08:00	Gen Bacterial Cult (Not T.B)	0 - Sputum - Bact	Routine	+			GRI Ward 10 Respir

3. Collect the correct specimen(s)

- Select the icon in the <Collected> column

Icon	Profile	Surname	Forename	Date of Birth	Episode No	Start Date	Start Time	Order Item	Specimen	Priority	Collected	Current Location	Patient Room	Patient Location at request
984		Dummyspatient	Brenda	01/04/1937	00020000678	04/06/2020	14:06	Bone Profile Ferritin Folate Rheumatoid Factor	Blood - Yellow Blood - Yellow Blood - Yellow Blood - Yellow IMCHEM	Routine Routine Routine Routine				GRI Vetting

- Collected by will auto populate with your name
- The current Date/Time will default
- The Select box(s) will be ticked
- Select <Update>

Collection Details

Collected By:

Date:

Time:

User:

Select	Request Item	Status	Notes	Specimen	Spec.Site	Order Start Date	Order Start Time	Requested By
<input checked="" type="checkbox"/>	Bone Profile ,Ferritin ,Folate	Verified,Verified,Verified		Blood - Yellow , Blood - Yellow , Blood - Yellow		04/06/2020,04/06/2020,04/06/2020	14:06,14:06,14:06	Dr Pauline Hunter,Dr
<input checked="" type="checkbox"/>	Rheumatoid Factor	Verified		Blood - Yellow IMCHEM		04/06/2020	14:06	Dr Pauline Hunter

- Request form(s) will print at the printer associated to the PC – **MUST** be disposed of in the **CONFIDENTIAL WASTE**
- Now request all correct Lab requests as per the Phlebotomy Workflow process

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