Unit Collect vs. Lab Collect: Talking Points

With the transition to Epic, users need to be aware of several practice changes. First, Epic does have not a shared draw list between nursing and phlebotomy – when one sees it, the other does not. Second, when overriding the Epic default for Unit Collect vs. Lab Collect, it will persist on future lab specimens until switched back. The key item users need to adjust to is that if they see a collection task on their list, they are expected to do it or activate the override to push it to the right group.
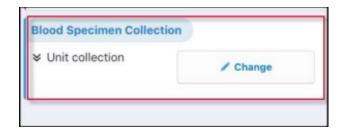
Objective:

1) Be able to speak to the impact on daily work for Nursing and Phlebotomy.
   a. In SCM, Nursing and Phlebotomy have a shared draw list – meaning either Nursing or Phleb can collect the specimen, and once collected, it falls from both disciplines' lists.
   b. In Epic only one discipline is designated as responsible, Nursing or Phlebotomy, based on complex logic – there is no longer a shared draw list.

2) Understand that the Epic default logic should be accurate most of the time – if it is regularly setting specimen collection to the wrong disciple, enter a ticket for a permanent fix. Overriding the default should only be used for outliers.

3) Know what to do if a specimen needs to be changed between disciplines.

   a. You need to override the default to the appropriate owning discipline.
   b. This changes **ALL** specimens that could be collected by Nursing or Phlebotomy, you cannot change a single specimen.
   c. Note that there are some nuances; for example, urine is always set to Unit Collect and will never change to Lab Collect even when using the override.

4) Recognize how to flip between Nursing and Phlebotomy as a first step to a "I don't see the specimen for me to collect" issue.
   a. Remember that you must be mindful of flipping only when appropriate and resetting once you are done… "**Don't set it and forget it**".

5) Enforce the mantra that if a specimen collection task appears on their list – they are expected to either collect the specimen or activate the override to push to the right group. Never leave a specimen collection task undone or overdue.
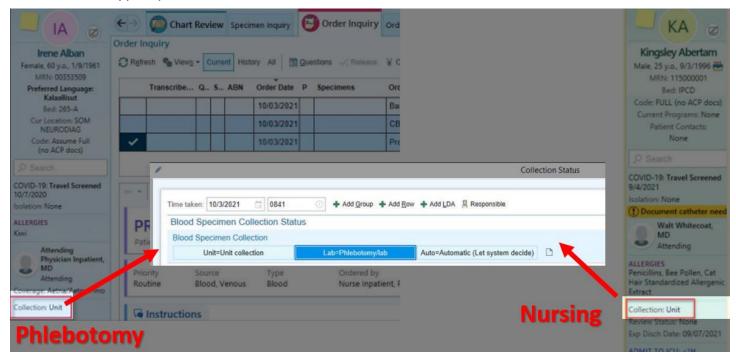
How it Works

- Once lab orders are placed into Epic, the system follows logic to know if that specimen should be Unit Collect or Lab Collect, as well as which specimens can be affected by the override. Some specimens, like urine and stool, will always ignore the override and always be Unit Collect.

- Both Nursing and Phlebotomy will have the option to view and edit the override.
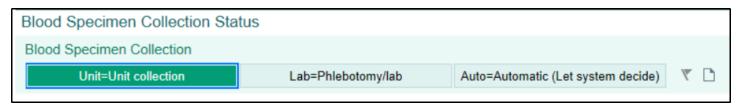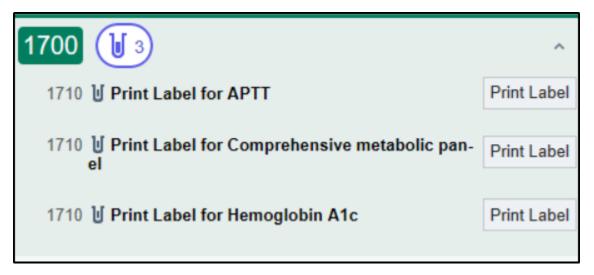
  o Rover (Nursing and Phlebotomy):

o Hyperspace:

- Once the override is set, all eligible uncollected specimens will go to that group.
- When the specimen is reassigned to either group, the collection task is removed from the other.
- If you set an override, future orders will respect the override instead of the system default. If you override who is collecting, it will stay that way until someone changes it.
- A simple example to contextualize…
  o A patient has 3 tubes needing to be drawn – lavender, light blue, and green – and Phlebotomy is responsible for collecting these.
  o As the nurse, I need the APTT drawn now so I know how to titrate my heparin infusion in an hour or two. I have no specimen collection tasks on my Brain, so I use the override to set the labs to Unit Collect.
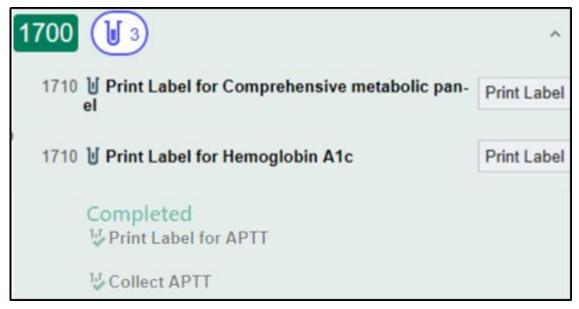

  o This override sets all tubes to Unit Collect and now they appear on my list to draw. I cannot only change the APTT to Unit Collect while leaving the rest.

Change Management – RWJBH Informatics

1700 (U 3)

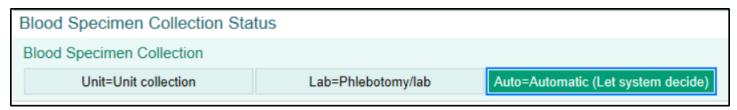|		
1710 U **Print Label for APTT**		Print Label
1710 U **Print Label for Comprehensive metabolic panel**		Print Label
1710 U **Print Label for Hemoglobin A1c**		Print Label

- o Note that I only want to draw the APTT – so I print that label and collect the specimen. That lab now appears as completed, while the others remain uncollected.

1700 (U 3)

1710 U **Print Label for Comprehensive metabolic panel**		Print Label
1710 U **Print Label for Hemoglobin A1c**		Print Label

Completed
✓ Print Label for APTT

✓ Collect APTT

- o In order for Phlebotomy to be aware that they need to draw these specimens – I as the nurse must reset the override back to Automatic. If I do not do this, these specimens cannot be drawn by Phlebotomy, they are not notified, and all future lab orders will be set to Unit Collect.

Blood Specimen Collection Status

Blood Specimen Collection

Unit=Unit collection	Lab=Phlebotomy/lab	Auto=Automatic (Let system decide)

- Leadership will be monitoring for override abuse (nursing who pushes everything to phlebotomy when it is not required) as well as for overdue specimen collections.

Change Management – RWJBH Informatics

Learn More

Learning Home Dashboard: Inpatient Clinical Learning Home Dashboard

Remember – Tip sheets and Guides on the Learning Home Dashboard.

The changes identified in this document are significant to your hospital. Please reference the following Tip Sheets / Guides:

- Specimen Collection – Inpatient Clinical Learning Home
- Collect an Inpatient Specimen – Lab Clinical Pathology Learning Home

Remember

Playground

Once you complete your training, you may access the Epic Playground environment. Use this environment to learn and practice the new Epic workflows.

Focusing on the changes identified in this document will help your hospital in the successful implementation.

As part of the Playground environment, you will have access to the Learning Home Dashboard to learn about other changes

You Can Also

View the Change Video
A demonstration was held and recorded for this workflow. The demonstration is located in NetLearning for the user to locate and assign to themselves using the "Learning Opportunities (Enroll) button. To locate the recording for this change, and all other recorded demonstrations, search for "Change Management" and select the appropriate demonstration.

Questions can be sent to your informatics representative. If they cannot answer the question, they will partner with you to find the answer with the EpicTogether Team.

Version	Purpose of Change	Author	Date of Change
1.0	Initial Creation	Selena McClinton Jordan Musleh	4/12/2022
2.0	Formatting and content updates	Jordan Musleh	4/20/2022