Info HQ Manager v2.1

USER GUIDE

Abbott

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Preface

This user's guide contains instructions on how to use and manage the Abbott Point of Care Info HQ Manager system.

Intended use

Info HQ Manager is a web-based data-management software application that enables healthcare professionals to manage and share results from point-of-care diagnostic testing devices throughout the healthcare system.

Info HQ Manager is designed to facilitate regulatory compliance, track operator training on diagnostic testing devices, monitor device performance, and manage the test results that are collected from point-of-care (POC) testing devices.

For details about which devices are supported, refer to the *Info HQ Manager Specification Sheet*.

About this guide

This manual is organized as follows:

Section 1: Getting started	Overall description of the system, naming the major system components and describing their uses or functions.
Section 2: Summary of the activity using the Dashboard	Description of the Info HQ Manager Dashboard, a graphical snapshot of the overall activity of the system. Each area of the Dashboard has hyperlinks for accessing the major sections of the Info HQ Manager display.
Section 3: Alert management	How to view and handle centralized common alerts.
Section 4: Test results management	How to manage patient test results. Results are managed based on type of device, type of test, when tests are conducted, and associated alerts.
Section 5: Operator management	Instructions for managing operators, including their device certifications.
Section 6: Patient management	How to view and manage patient information when Info HQ Manager is configured to receive Admission, Discharge, & Transfer (ADT) data.
Section 7: Device management	How to add and manage POC testing devices registered in the Info HQ Manager system.
Section 8: Inventory management	How to manage the inventory of cartridge lots and add new lots.
Section 9: Quality control (QC) management	How to manage QC for reliable and accurate patient testing.
Section 10: Info HQ Manager system management	Information and procedures for managing and maintaining the Info HQ Manager system.
Section 11: Reports	How to generate reports, create and delete scheduled reports, and view generated reports in Info HQ Manager.

Section 12: Technical support	Guidance on how to contact the technical support team in your area and on what information to have available.
Index	Where names, titles, and topics can be found in this manual.

1 - Getting started

1.1 Point-of-Care testing (POCT) and the data management system

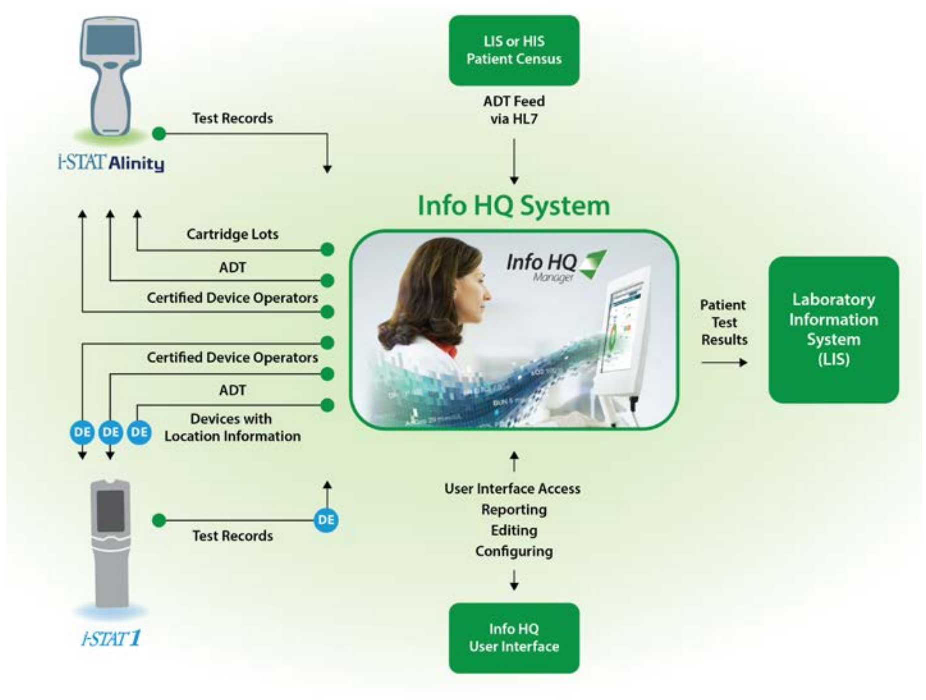
Point-of-care testing (POCT) generally refers to medical diagnostic testing within a healthcare facility that is performed in close proximity to the patient. Point-of-care tests usually fall within one of two categories: waived or moderately complex. The healthcare facility must be licensed from the necessary accrediting agencies to perform these POC tests, and any member of the medical staff that performs the tests (operators) must be certified on the testing device.

Granting of the license typically requires that the laboratory or the healthcare system administer the appropriate training to operators on the proper use of various POCT methods in use by the healthcare system, and monitor the appropriate use of devices by operators after training. It also requires the monitoring of proper device functioning.

Info HQ Manager is a web-based POC data management system, deployed on the organization's LAN or WAN, typically behind the health system's firewall. Info HQ Manager is designed to facilitate regulatory compliance by managing test results collected from POC testing devices, tracking operator training on diagnostic testing devices, and monitoring device performance. Info HQ Manager forwards the test data it collects to external systems (LIS, EMR, LMS, and so forth) and provides tools to correct and resend data to those external systems. Operator and regulatory compliance are easily maintained, and exceptions are easily located and can be addressed using the simple user interface.

Figure 1-1: System overview is a high-level illustration of the possible connections with the Info HQ Manager system. It is not necessary that all of these connections be in place with any given installation. A functioning system consists of a minimum of POC testing devices, a POC data management system, and a user accessing the data management system.

Figure 1-1: System overview



1.2 Start Info HQ Manager

Info HQ Manager is a web-based application that uses a web browser. To start Info HQ Manager, enter the Info HQ Manager URL into the URL field of a web browser window then press **Enter**.

The Info HQ Manager login screen opens.

1.3 Log in to Info HQ Manager

When Info HQ Manager is started (*Start Info HQ Manager*), the user login screen is displayed.

Figure 1-2: User login screen

Follow these steps to log in.

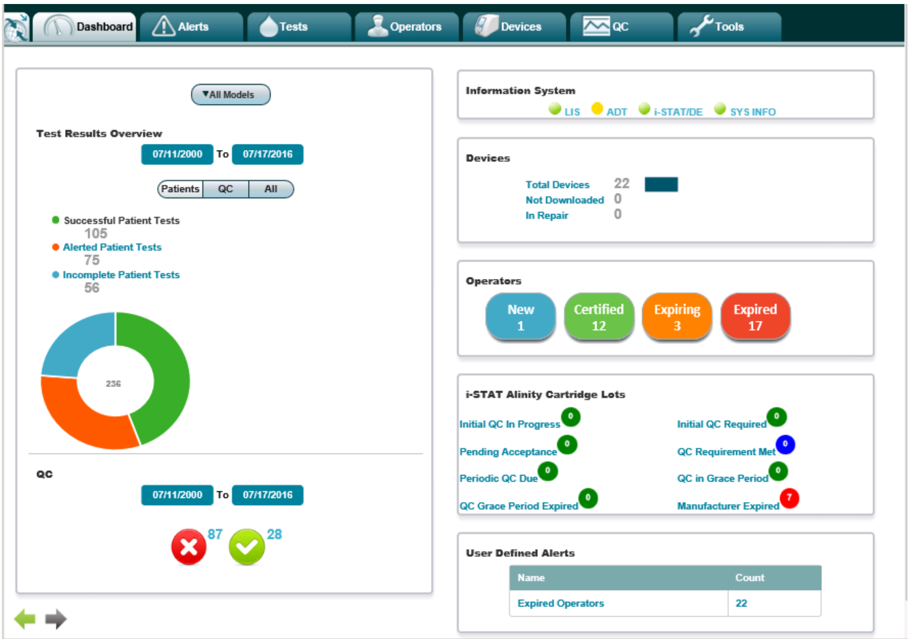
1. Enter the username and password for the account.

   If necessary, click the **Forgot Password?** link to reset the password.

2. Click **Login**.
   Info HQ Manager starts and the Dashboard opens, as shown.

Note: The i-STAT Alinity Cartridge Lots area of the Dashboard screen is displayed only when Cartridge Lot QC Enabled is set to Yes in the Info HQ Configuration.

Figure 1-3: Dashboard screen



1.4 Exit Info HQ Manager

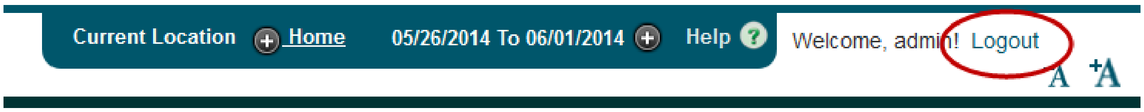
A user remains logged into Info HQ Manager until he or she logs out, or until the session reaches 30 minutes of inactivity — after which the user is logged out automatically.

Note: To adjust the timeout security setting based on your facility's policy, change the *Session Time Out* configuration setting. See the *Info HQ Manager Implementation Guide*, for instructions on how to change system configuration settings.

To log out of Info HQ Manager:

1. In the upper right corner of the Info HQ Manager window, click **Logout**.

   Figure 1-4: Logout option

   The login screen is displayed again.

2. Optionally close the browser window.

1.5 The Info HQ Manager user interface

Screens within Info HQ Manager user interface vary in appearance, depending on the function being performed. *Figure 1-3: Dashboard screen* shows the look of the screen when the Dashboard is displayed, and *Figure 1-5: Info HQ Manager screen overview* shows the look when the **Operators** screen is displayed.

While the look might vary, many Info HQ Manager screens have a look and structure similar to what is shown here.

Figure 1-5: Info HQ Manager screen overview

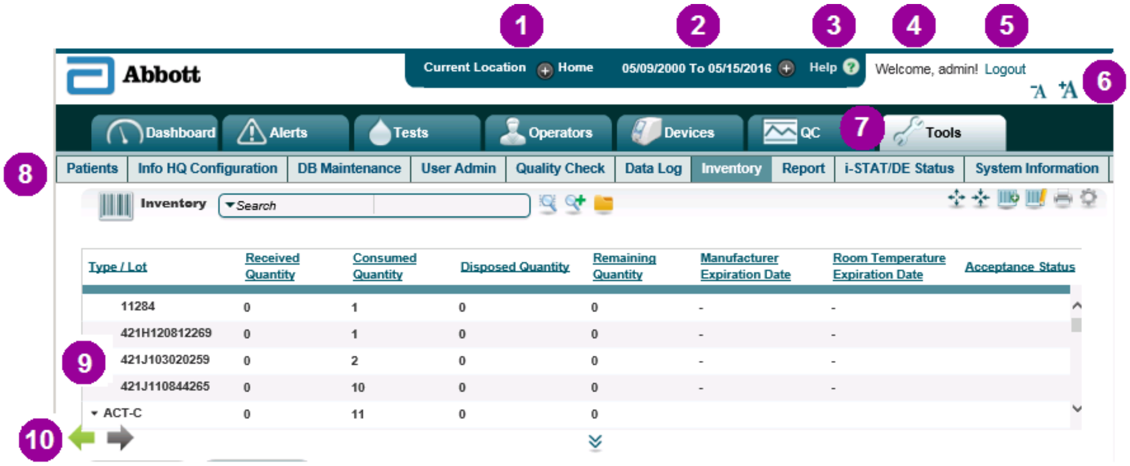
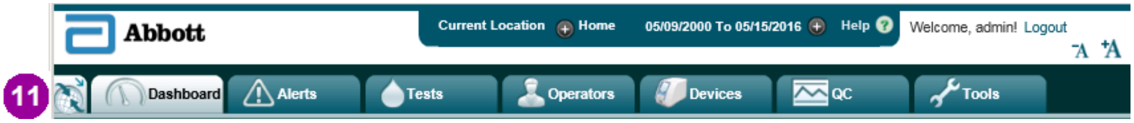


Figure 1-6: Location tree



The following table describes each area.

Table 1-1: Info HQ Manager screen overview

Item	Description
1	**Location Breadcrumb** (*Set the location using the location breadcrumb*) The location (Healthcare System, Facility, Department, or Area) that is currently selected. Data elements in the various tabs are filtered and displayed based on the location selected.
2	**Date Range** The date range for the data that is being displayed. Click the date or the plus sign to change the date as needed.
3	**Help** Opens documents that provide details and instructions on the use of the Info HQ Manager software: On Screen Help, *User Guide*, *Specification Sheet*, and *Implementation Guide*.
4	**Current Logged In User** The name of the currently logged in user.
5	**Logout** Logs the currently logged-in user out of the system.
6	**Font Buttons** Decreases or increases the font size of certain data and labels.
7	**Primary Screen Tabs** Displays each main area of the Info HQ Manager application. The name of each tab indicates the type of data to display.
8	**Secondary Screen Tabs** Secondary tabs further divide the data into logical sections, with the name of each secondary tab indicating the type of data to display.
9	**Display Area** The primary area for displaying data. The look of the Info HQ Manager screens varies, based on which primary and secondary tabs are selected. Screens might have any of the following additional elements in the display area: • Search options to help locate or filter the information displayed. • Icons that vary based on the screen, with rollover tooltips to identify the action of the icon (see the *Action icons* section). • Buttons that vary based on the screen, to perform functions on data that is selected in the display area (for example, Send to LIS, Acknowledge). Some screens do not contain any buttons. For more detailed information about the display area, see the *Display area* section.

Item	Description
10	**Back/Forward Buttons** Navigate to the previous page, or navigate one page forward. These buttons work like the web browser's Back and Forward buttons. **Note:** The web browser's Back and Forward buttons cannot be used with the Info HQ Manager application.
11	**Location Tree** (available with some, but not all screens) An expandable and collapsible list of the available locations in the organization, accessed by clicking the icon. The Tree can remain visible, or it can be hidden to allow more information to be displayed on the display area. The Tree is located on the left side of the screen and is synchronized with the Location breadcrumb at the top of the user interface.

Primary screen tabs

The primary tabs, located above the display area, are the main way of navigating to the major functional screens of Info HQ Manager. Each tab displays a specific kind of information.

Figure 1-7: Primary screen tabs

The primary tabs are as follows:

Dashboard	A graphical summary of the system activities.
Alerts	Buttons that identify the number of currently active alerts for each of the nine types of alerts.
Tests	Patient test results data.
Operators	Operator information and certification status.
Devices	Information for the devices that have been registered in the system.
QC	QC testing data from the devices that have been defined in the system.
Tools	Various tools for setting up and managing the Info HQ Manager system, including reports.

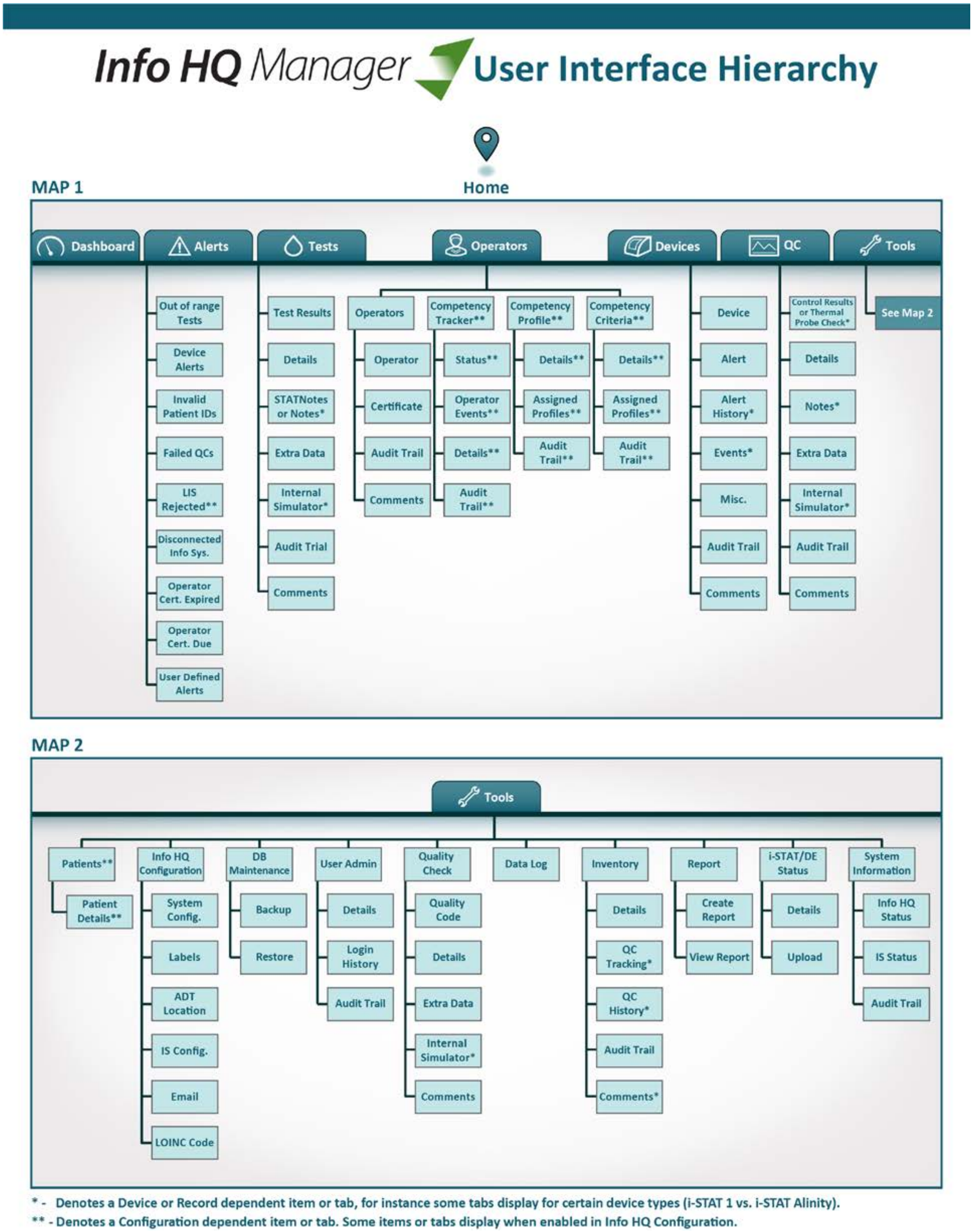
Secondary screen tabs

When some primary tabs are selected, the screen displays a secondary set of tabs. These tabs provide additional functions and screens, and are another means of navigating in Info HQ Manager. Here is an example showing the secondary tabs that are displayed when the **Tools** primary tab is selected.

Figure 1-8: Secondary screen tabs

Info HQ Manager Hierarchy

Use the graphics below as a guide for navigating the areas in the Info HQ Manager.



Display area

The display area is the screen area below the primary and secondary tabs. The display area for the Dashboard is different from other screens, as it is a graphical summary of the system's activity. (See section 2, *Summary of the activity using the Dashboard*, for more information about the Dashboard.) The display area for screens other than the Dashboard consists of:

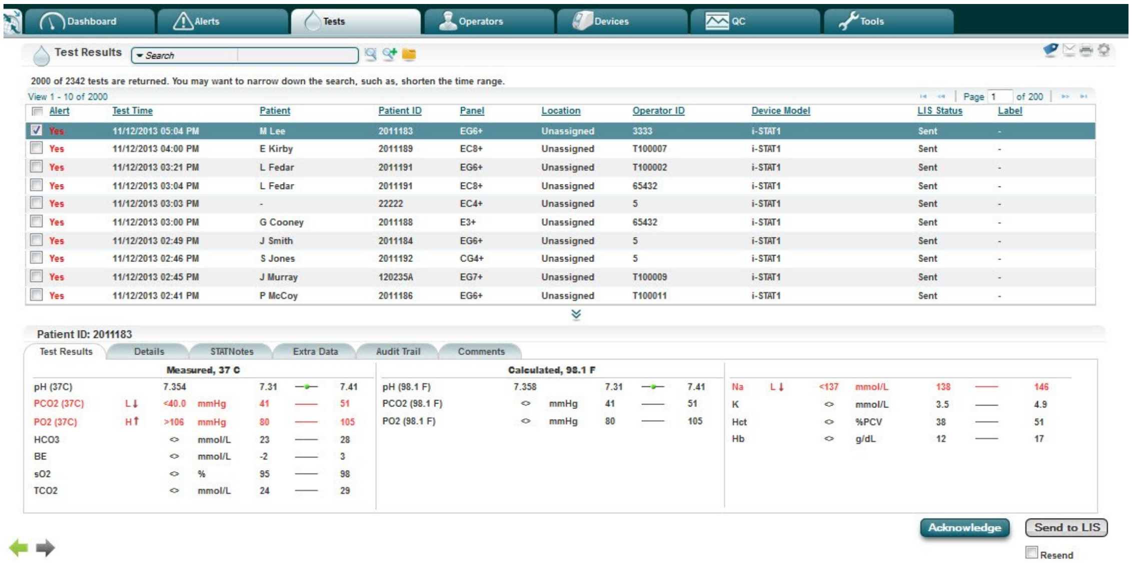
- Icons (most often located near the top of the screen and vary depending on the screen) that perform functions related to the selected tab, for example and .
- Buttons (typically near the bottom of the screen and vary depending on the screen) that take an action on the selected results, for example Acknowledge and Add.
- The area where results are displayed.

There are two screen layouts for the display area: the List view (see ***Figure 1-9: List view***) and the Alerts view (see ***Figure 1-16: Alerts view***). The following sections describe these display area views.

List view

Most screens display results in List view, as shown.

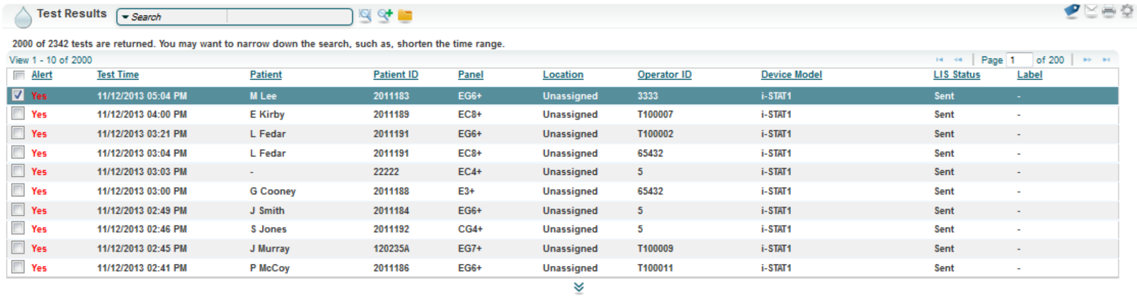
Figure 1-9: List view



The screen in List view is divided into two panes of information: the upper pane is the List pane and the lower pane is the Details pane.

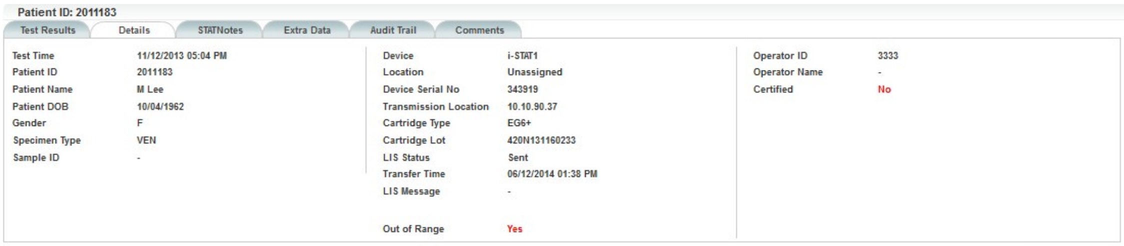
The List pane is a table format with varying columns depending on the screen, as shown.

Figure 1-10: List pane



The Details pane contains one or more additional tabs with more detailed information for the item selected in the List pane.

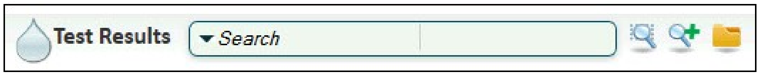
Figure 1-11: Details pane



The List view can also display some or all of the following, depending on the screen:

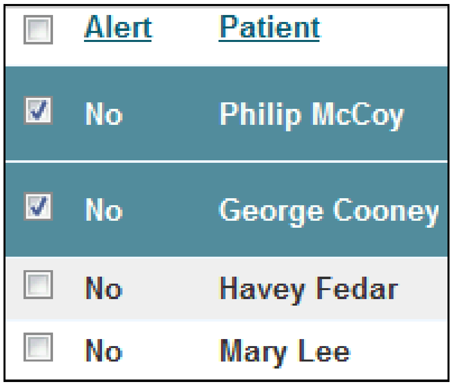
- A search entry box with associated icons, to help search and locate a specific record within the current results, for example searching the displayed test results for a specific operator. See *Filter the results* for more information.

Figure 1-12: Search entry box



- A column of check boxes on the left, used to select one or more results in the display.

Figure 1-13: Selection boxes



Display details in a pop-up

Double-click a selected result to display a pop-up window with all the details for the selected item, as shown. Click the X in the upper-right corner to close the pop-up.

Figure 1-14: Details pop-up for i-STAT Alinity

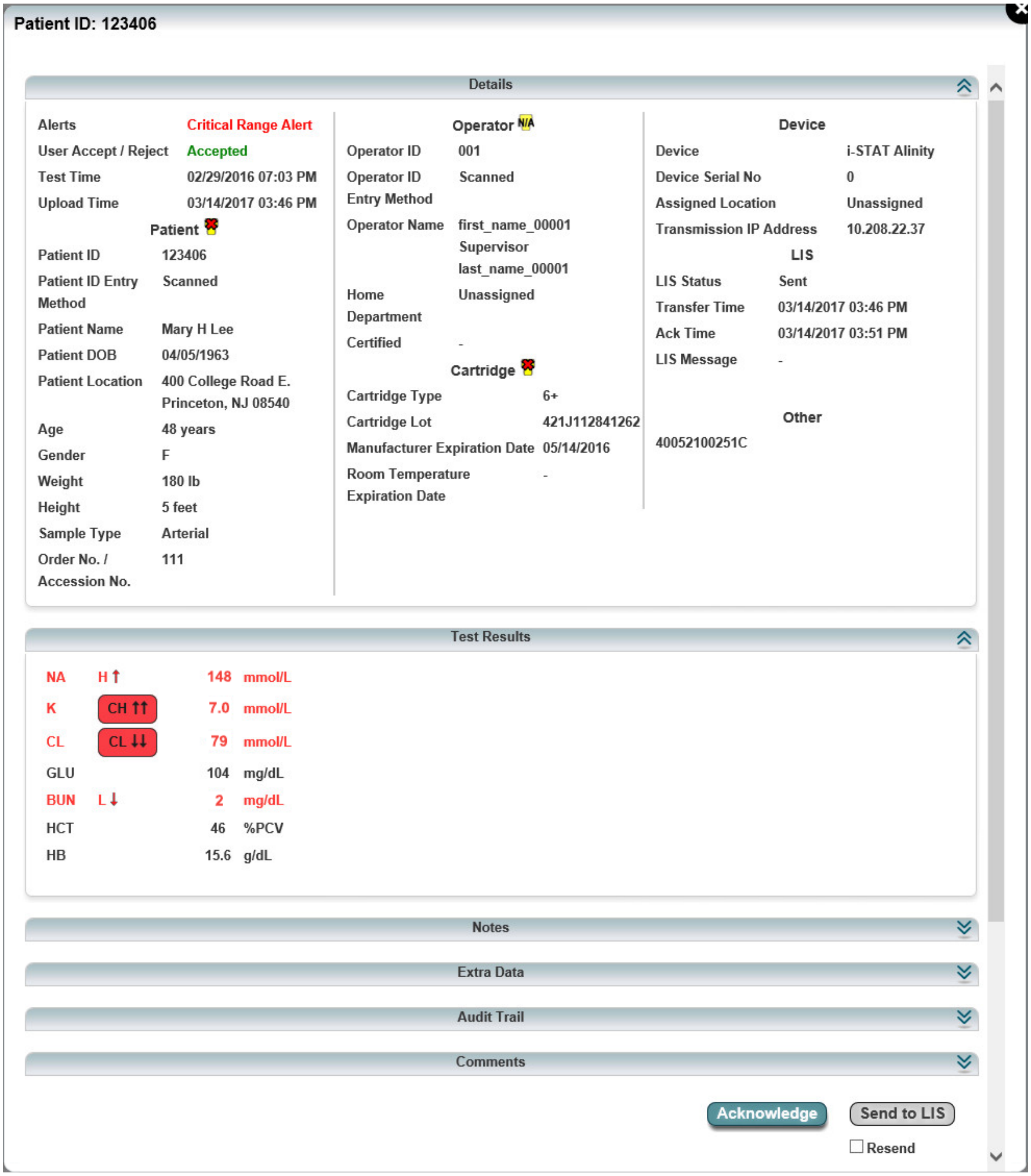
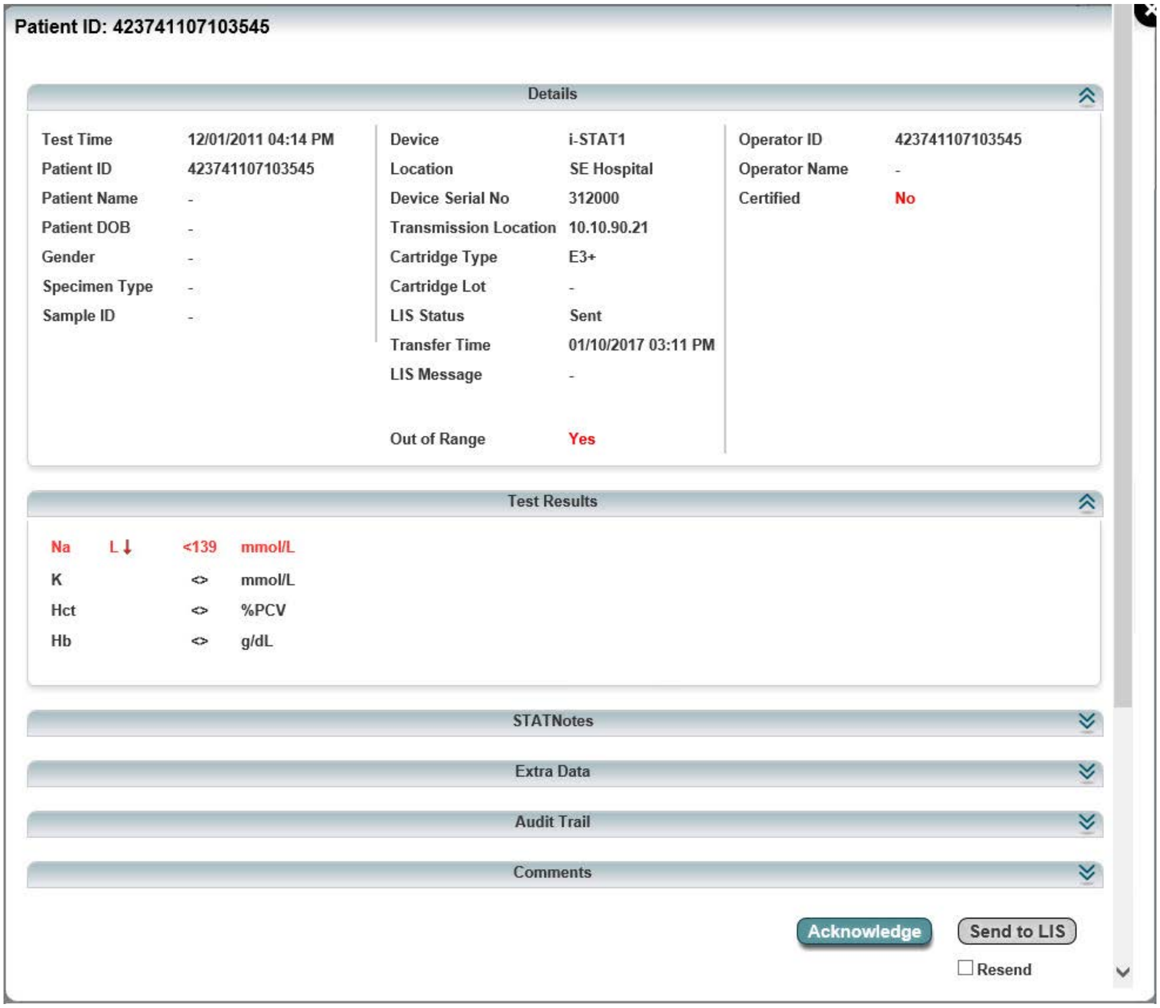


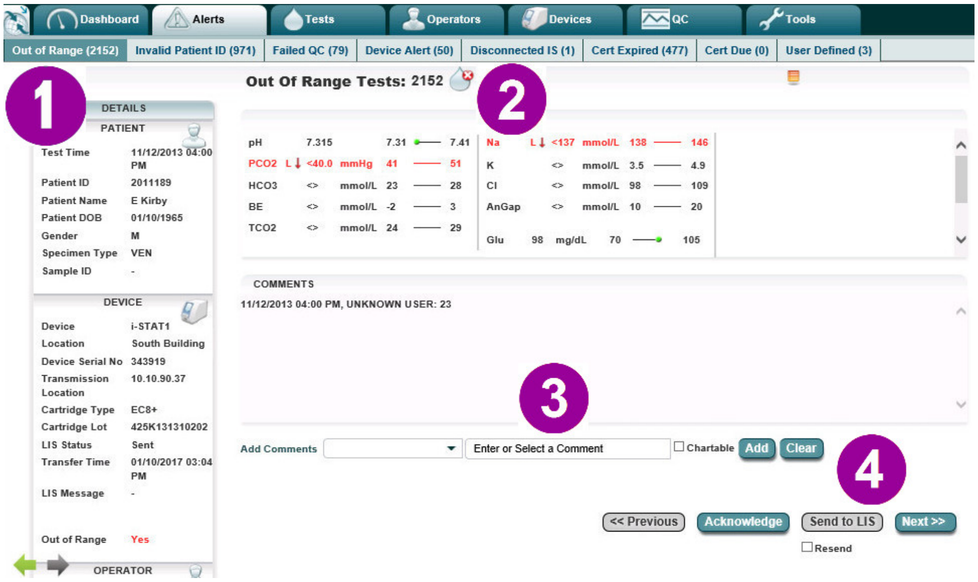
Figure 1-15: Details pop-up for i-STAT 1



Alerts view for i-STAT Alinity

By default, the Alerts screen displays results in List view. However, it is possible to display details about a specific alert as shown in the example.

Figure 1-16: Alerts view



This view provides the ability to take quick action on the result, for example acknowledging an out-of- range alert or recertifying an operator.

Figure 1-16: Alerts view identifies items that the Alerts view can display per alert type. The following table describes those items.

Table 1-2: Main areas of the Alerts view

Item	Description
1	Details area: details about results, such as information about the patient on whom a test was run, the device on which the test was run, the operator who performed the test, and so on.
2	Record area: Specific, detailed information about the record.
3	Comments area: Add comments to associate with the record.
4	Buttons for performing actions, such as acknowledging an alert or sending an alerted test result to the LIS, and for displaying the previous and next alerts.

Switch between List view and Alerts view

By default, alerts are displayed in List view. To show alerts in Alerts view instead, change the **Show Alerts Screen** configuration setting. See the *Info HQ Manager Implementation Guide*, for instructions on how to change system configuration settings.

When viewing results in the Alerts view, click near the top of the screen to change the display to List view. After switching to List view, there is no quick way to return to Alerts view.

Control the contents of the display area

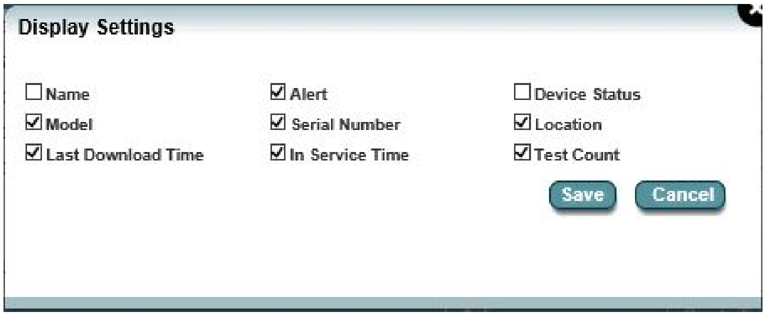
The Info HQ Manager user interface provides several ways to control the contents of the display area so that the most useful information is presented.

Add and remove the display columns

Each screen that displays results in List view (refer to *Figure 1-9: List view*) has a different set of columns that can be displayed. The display settings can be modified to display or hide columns in the display area, as described in these steps:

1. Click in the upper-right of the display area.
   A dialog box with check boxes opens, as shown. Available check boxes vary depending on which screen is displayed.

Figure 1-17: Display Settings



2. Check the columns to display and deselect the columns to hide.
3. Click **Save**.

   The display settings are saved and the display area updates with the appropriate columns.

Sort the results

The results displayed in the List view can be sorted based on a specific column, in ascending or descending order. The default display is descending.

- The sort order is indicated with an up arrow (ascending order) or a down arrow (descending order) to the right of the column name.
- The column heading that displays the up or down arrow is the column by which the results are currently sorted.

To sort the results, click the desired column heading to sort in ascending order. Click the column heading a second time to sort in descending order.

Filter the results

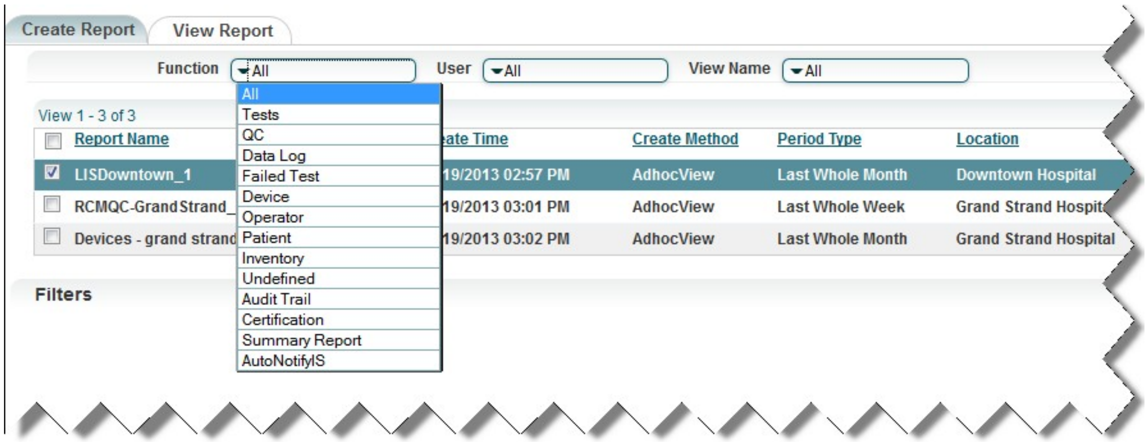
Filtering narrows the results that Info HQ Manager is to return. For example, the date range in the location breadcrumb is a filter that returns only test results for the specified period of time (for example, today, two days ago, or last week). The current location in the location breadcrumb is also a filter that returns, for example, test results for a specific location (for example, ICU) or operators with the same home department.

Many Info HQ Manager screens can further filter the results. Filtering is accomplished through filtering drop-down lists or user-entered search strings. The following sections describe how to use filtering in Info HQ Manager.

Filter results using drop-down lists

Some Info HQ Manager screens provide additional filtering capability. For example, *Figure 1-18: Filtering drop-down list* shows the Function filter on the **Report** screen, which can be used to filter the display so that it shows reports of only one type (for example, Tests, QC, or Data Log).

Figure 1-18: Filtering drop-down list



When a screen has filtering drop-down lists, use the following steps to filter the results displayed:

1. Click the filtering drop-down list.
2. From the drop-down list, select one of the predefined filter options.
3. If other filtering drop-down lists are available, click the desired filter options from those drop-down lists to further filter the results if desired.

   The display area updates with results based on the selected filter.

Filter results using search strings

Many Info HQ Manager screens provide a search filter (*Figure 1-19: Search criteria*) to enter a search string and filter results based on that string. For example, on the **Operators** screen, the results can be filtered to return only those operators with the specified last name.

The Info HQ Manager filtering feature can filter the results based on multiple search strings entered. For example, filtering can be used to find operators with a specific last name and with an expired certification. If the filter is one that will be performed multiple times or regularly, the search criteria can be saved.

Figure 1-19: Search criteria

To filter the results using a search string:

1. Click the search field drop-down list.
2. Select the predefined search option.
3. In the secondary search field, either enter the appropriate search string (such as a last name) or select a predefined search string if one is available.

   If a predefined search string is selected, the display area updates with results that are filtered based on the search string criteria.

4. To filter on more than one search string, perform the following additional steps. If filtering on one search string, proceed to step *5*:
   a) Click .
      Another set of search fields is displayed.
   b) Enter the appropriate search string or select a predefined search string if one is available.
   c) Repeat these steps if additional filtering is needed. Otherwise continue to step *5*.
5. When all search strings have been entered, click or press Enter to start the search. The display area updates with results that are filtered based on the search string criteria.

Save search criteria

If a specific search is performed frequently, it might be helpful to save the search criteria. When saved, select the search criteria from the saved list and avoid having to enter the search criteria. To save the search criteria:

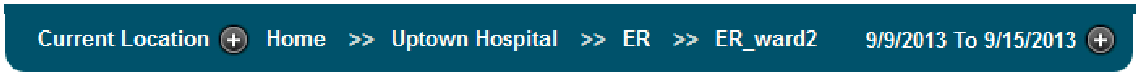
1. When all search criteria have been entered, click .
2. Enter a name for the saved search criteria, then click Save.

The search criteria are saved. To use the saved criteria, click to display a list of previously saved search criteria. Then select the previously saved search from the list.

Set the location

Info HQ Manager shows data based on the current location. The current location is displayed at the top of the screen.

Figure 1-20: Location display



The location is made up of four hierarchical levels: Healthcare System, Facility, Department, and Area. Each level of the location is linked to the level above. This is known as a parent-child relationship.

Level	Description
Healthcare System	Name of the healthcare system. By default, the Healthcare System is named Home, however this can be changed to a more descriptive name, for example Coastal Medical Partners or CMP. (See System configuration settings.) Only one Healthcare System level can be defined. Parent to all Facilities.
Facility	Medical facilities within the Healthcare System, for example Uptown Hospital or West Side Clinic. There is no limit to the number of Facilities that can be defined. Parent to all Departments associated with a specific Facility, and child to Healthcare System.
Department	Associated departments within a Facility, for example ER. There is no limit to the number of Departments that can be defined. Parent to all Areas associated with a specific Department, and child to the associated Facility.

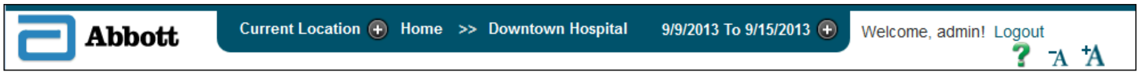
Level	Description
Area	Associated areas within a Department, for example ER_ward2. This hierarchy level is optional. There is no limit to the number of Areas that can be defined. Child of the associated Department.

Set the location using either the location breadcrumb or the location tree, as described in the following sections.

Set the location using the location breadcrumb

The location breadcrumb is displayed at the top of the screen in a teal-colored box labeled **Current Location**, as shown.

Figure 1-21: Location breadcrumb



The breadcrumb shows the location that is currently set, beginning with Healthcare System, followed by Facility, Department, then Area. The current location can be set to any of the four levels, with the current location selection being the level shown at the end of the breadcrumb, for example *Downtown Hospital*.

Each level in the breadcrumb is "active" to enable a quick change of the location. When the mouse is moved over any level of the location, the cursor changes and the level is underlined. When a level is clicked, the current location changes to that level and the user is given a drop-down list for selecting a lower-level location or creating a new location.

Follow these steps to change the location using the location breadcrumb:

Note: The current location can be set to any of the four location levels, with the current location being the level shown at the end of the breadcrumb. For example, if the breadcrumb is Home >> Downtown Hospital >> ICU, the current location is *ICU*.

1. If the new location is to be a parent level of the current location, click the desired parent level in the breadcrumb to set the location to that level.

2. If the new location is to be a child of the current location or a different child of a parent level in the breadcrumb:

a) Click the desired parent level.
The location is set to the selected parent level.

b) Click the parent level again.
A drop-down list displays a list of child locations.

c) Click the appropriate child level from the drop-down list.

d) Repeat these steps if the new location is to be another lower child level.

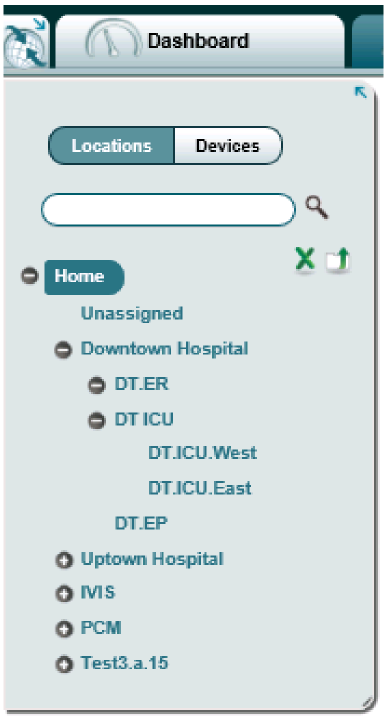
The display area automatically updates with results based on the new location.

Set the location using the location tree

The location tree, shown in *Figure 1-22: Location tree*, displays a tree hierarchy of available locations, beginning with Healthcare System, followed by Facility, Department, and Area.

The location tree is often hidden to provide additional space in the screen display area. Click the  icon to the left of the primary tabs to make the location tree visible, as shown.

Figure 1-22: Location tree



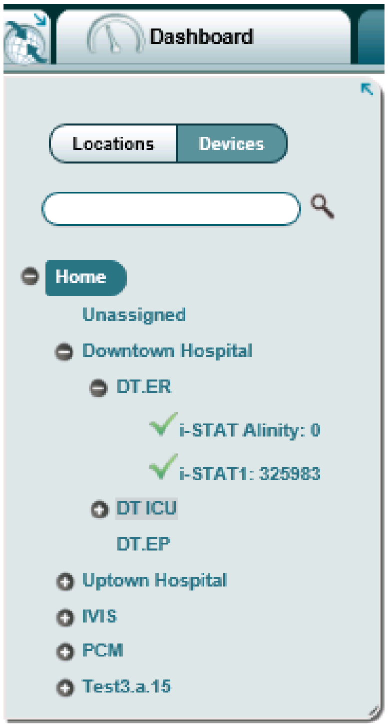
Use the plus and minus icons to the left of each level to expand and collapse a level, revealing the levels within it.

The current location can be set to any of the four levels, with the current location selection being the level that is highlighted, for example *Central NJ Med Ctr*.

The location tree also displays a tree hierarchy of devices that are associated with a location within a Department, as shown in *Figure 1-23: Location tree: devices*. The device hierarchy is displayed when the **Devices** button above the expandable/collapsible tree is clicked.

The location tree and location breadcrumb are synchronized and represent the same data.

Figure 1-23: Location tree: Devices



Follow these steps to change the location using the location tree:

1. Click to the left of the primary tabs if the location tree is hidden.
   The location tree opens, with the current location setting highlighted in the tree. In *Figure 1-23: Location tree: Devices*, for example, the current location is *DT.ER*.
   Note: A plus or minus sign next to a location indicates that the location has devices or other levels of hierarchy within it. Locations with no plus or minus sign do not have devices.
2. Expand or collapse the levels of the location tree until the desired location level is visible.
3. Click the desired location level.
   The new location is set and the results in the display area update with data based on the new location.
4. Optionally, click to hide the location tree.
   Note: If the location filter is selected, it acts as a global filter and is applied to different screens.

Change the date range

Data displayed by Info HQ Manager is based on the current location and the date range. Unless the system default setting has been changed, the default date range is *This Week*.

A change to the date range is in effect only for the current logged-in user and resets back to the system default setting (This Week) when the user logs out.

To change the date range:

1. Click + to the right of the date that is displayed at the top-right of the Info HQ Manager screen. A drop-down list displays several predefined time frames and a date range option.
2. Click an option from the drop-down list.

   If **Date Range** was selected, enter the beginning date in the **From** field and the end date in the **To** field, using date format consistent with Info HQ Manager system. Then click **Set**.

The new date range is set for the duration of the current logged-in session, and the display area updates with data based on the new date range. During the current logged-in session, all other operations performed in Info HQ Manager will use the new date-range setting.

To more permanently change the date range whenever any user logs into Info HQ Manager, the *Test View Default Date Period* system configuration setting must be changed. To change this setting, refer to the *Info HQ Manager Implementation Guide* for information on system configuration settings.

Action icons

The action icons listed are used in the Info HQ Manager user interface.

Table 1-3: Action icons

Icon	Definition/Use
	Display the online help.
	Reduce the screen font size.
	Increase the screen font size.
	Go Back: Navigate to the previous page viewed, like the back button of a browser window.
	Go Forward: Navigate one page forward, like the forward button of a browser window.
	Search the current results for the specified search string.
	Add search criteria.
	Saved Searches: Display a selectable list of previously saved searches.
	Clear: Erase information entered into the field.
	Save modified data.
	Add a label to the selected item.
	Export the data for the current primary tab to a Microsoft® Excel® spreadsheet.
	Send a system-generated email.
	Change the current display settings.
	Upload data into Info HQ Manager from an external file located on a local drive, on a network drive, or on a USB device.

Icon	Definition/Use
	Add a new operator.
	Edit the information about the selected operator.
	Work Facility: Assign one or more work facilities to one or more operator profiles.
	Group Certify: Certify one or more operators.
	Group Recertify: Recertify one or more operators.
	Edit the selected item.
	Delete the selected item.
	Expand all items in the display.
	Collapse all items in the display.
	Add a new device.
	Edit information for the selected device.
	Delete the selected device.
	Create a printable report from the data that is displayed on the screen.
	Undo changes made in the field, and revert to the previously saved value.
	Create New User: Add a new Info HQ Manager user.
	Edit information about the selected Info HQ Manager user.
	Switch from the Alerts view to the Lists view.
	Schedule Settings: Schedule the automatic creation of customized reports.
	Make the selected operator competency profile the organization default.
	Configure cartridge lot QC criteria.
	Assign competency profile.

1.6 Common operations in the Info HQ Manager user interface

Several different actions can be performed on the results that are displayed in the Info HQ Manager user interface. The following topics describe some of the most common actions:

Add comments
Acknowledge alerted test results
Send test results to the LIS
View the audit trail
Export data to a spreadsheet
Generate a report
Email data

Add comments

Many Info HQ Manager screens (for example, patient test results, devices, and QC tests) provide the option to add one or more comments to the item that is currently displayed. Each comment includes a record of the date and time it was created, and of which user created it.

Add a comment by entering text or by choosing from a list of recently added comments or predefined comments. The choice of predefined and recently added comments varies depending on which screen is active.

The 10 most recent comments are displayed.

Note: The location of the Comments field varies depending on the screen view (see *List view* and *Alerts view* for more information about screen views).

1. If in List view, click the Comments tab in the Details pane to display the **Add Comment** fields, as shown. If in Alerts view, the **Add Comment** fields are already on the screen.

Figure 1-24: Add Comment fields

2. If adding a new comment:

a) Click in the text box next to **Add Comment**. Then enter the comment to be added.

b) Click **Add** to save the comment and add it to the record. (Use **Clear** to delete and re-enter the text for the comment.)

3. If adding a predefined comment or a previously entered comment:

a) Click in the drop-down list next to **Add Comment** and select the comment to be added.

b) Select the desired comment.
The text of the comment is automatically entered into the field to the right of the **Add Comment** drop-down list.

c) Click **Add** to save the comment and add it to the record.

Acknowledge alerted test results

Some test results, for example tests that are out of range or tests that have an invalid patient ID, can generate an alert in the system. When an alert is generated, it can be reviewed and acknowledged by the Info HQ Manager users. Refer to the following sections within *Section 3: Alert management* for more detailed information on acknowledging test results with an alert:

- *Acknowledge an Out of Range alert*
- *Acknowledge an Invalid Patient ID alert*

Send test results to the LIS

Info HQ Manager has several ways of sending test results to the Laboratory Information System (LIS). Sending a test result to the LIS also acknowledges all alerts that are associated with the test result.

Refer to *Send patient test results to the LIS* in section 4, *Test results management*, for information about how to send patient test results to the LIS.

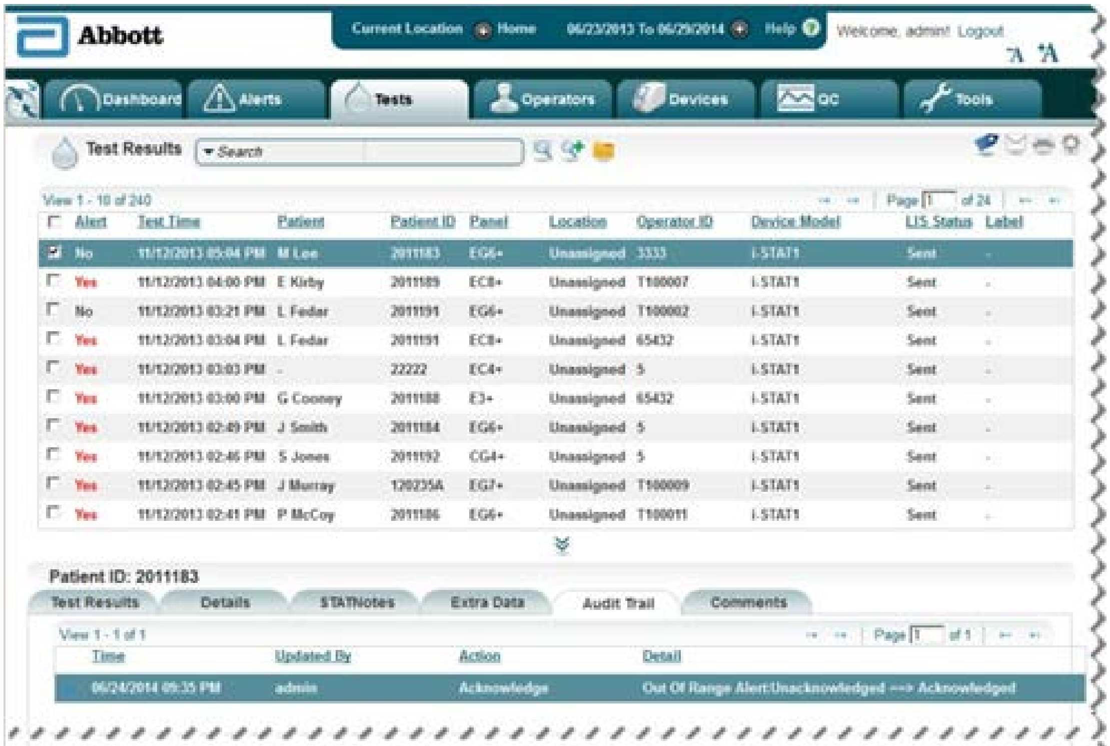
Refer to *Send QC results to the LIS* in section 9, *Quality control management*, for information on sending QC test results to the LIS.

View the audit trail

Info HQ Manager keeps track of all actions and changes made to test results (such as alert acknowledgements), operators, and consumables (cartridge lots). This record tracking is called the audit trail. Changes that are tracked can include, but are not limited to, acknowledging a test result, updating a patient ID, adding certifications to operators, and adding new consumables.

The audit trail is available for the Tests, Operators, Competency Criteria, Competency Profile, Competency Tracker, Devices, QC, User Admin, and Inventory tabs. Shown here is the audit trail for a patient's test results.

Figure 1-25: Audit trail



Perform the following steps to view an audit trail:

1. Click the desired primary tab (Tests, Operators, Competency Criteria, Competency Profile, Competency Tracker, Devices, QC, User Admin or Inventory), based on the type of record whose audit is to be viewed.
2. Select the desired record in the List pane (that is, the table area).
3. Click the Audit Trail tab in the Details pane (lower part of the screen).

System audit trail

In the system audit trail, Info HQ Manager keeps track of all actions performed by Info HQ Manager users, all changes made by them, and all system exception errors. Refer to *View the system audit trail* in section 10, *Info HQ Manager system management*, for more information.

Export data to a spreadsheet

Info HQ Manager can export records about locations, operator certifications, and devices to a Microsoft® Excel® template. This exported template can be used for purposes like printing or reviewing, and for uploading locations, operator-related data, and devices to Info HQ Manager.

Follow these steps to export the records to a Microsoft® Excel® template:

1. Depending on the type of records being exported, click the Operators or Devices tab, or expand the Location Tree panel.
2. Click .
3. For the Operators or Devices tab only, complete the following steps.
   a) In the pop-up window, select the template type, for example DeviceExcelTemplate for device records.
   b) Click **Generate**.
4. In the Save dialog box, choose Save to save the file to the Downloads directory.

   The records are saved to the current computer's Downloads folder in a .csv formatted file that can be opened in Microsoft® Excel®.

Generate a report

Many Info HQ Manager screens have an option to generate basic reports that are based on the selected filters, location, and date range (located at the top of the Info HQ Manager screen). More advanced reporting options are available from the **Tools** screen and are discussed in section 11, *Reports*.

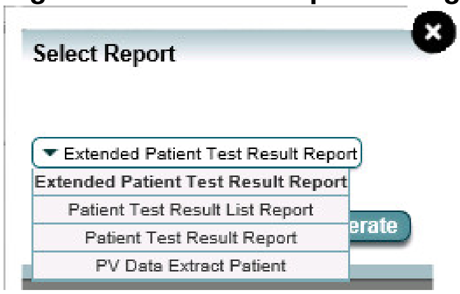
The type of reports available depends on the Info HQ Manager screen.

Generate a Basic Report

Follow these steps to generate a basic report:

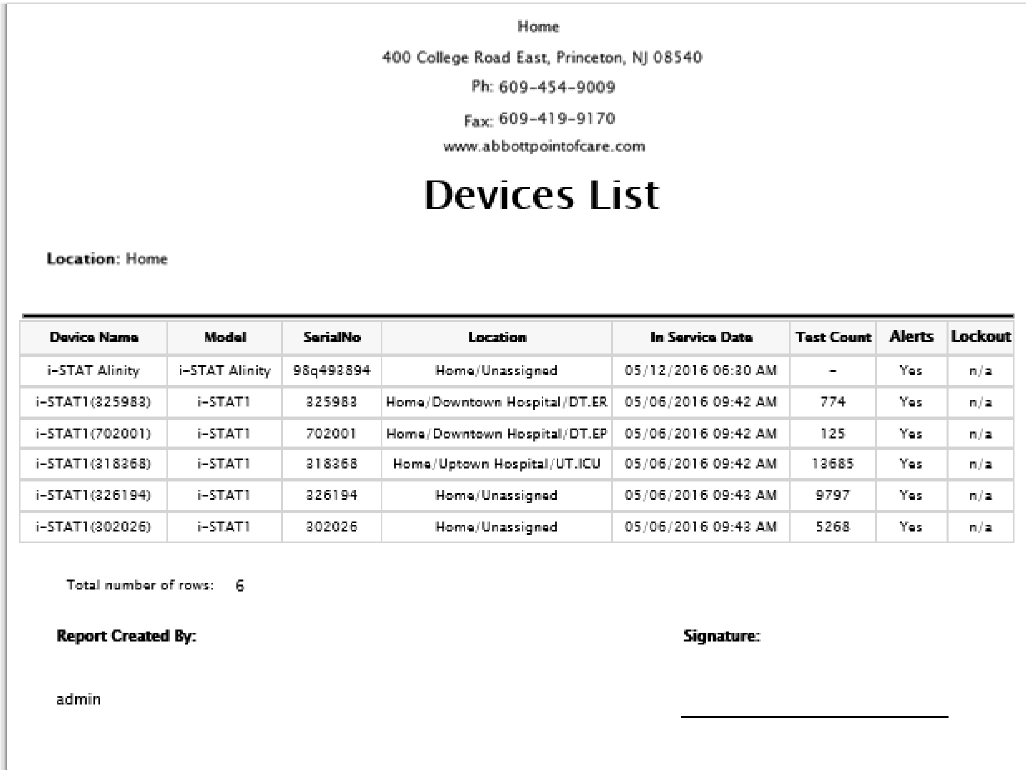
1. From the Tests, Operators, Devices, QC, or Patients screen, click . The **Select Report** dialog box opens, as shown.

Figure 1-26: Select Report dialog box



2. From the drop-down list, choose the desired report. The list of available reports differs, depending on which screen is currently active.
3. Click Generate.
   The report, similar to the Devices List Report shown, opens in a browser window.

Figure 1-27: Example of a report (Device List)



Home
400 College Road East, Princeton, NJ 08540
Ph: 609-454-9009
Fax: 609-419-9170
www.abbottpointofcare.com

Devices List

Location: Home

Device Name	Model	SerialNo	Location	In Service Date	Test Count	Alerts	Lockout
i-STAT Alinity	i-STAT Alinity	98q493894	Home/Unassigned	05/12/2016 06:30 AM	-	Yes	n/a
i-STAT1(325983)	i-STAT1	325983	Home/Downtown Hospital/DT.ER	05/06/2016 09:42 AM	774	Yes	n/a
i-STAT1(702001)	i-STAT1	702001	Home/Downtown Hospital/DT.EP	05/06/2016 09:42 AM	125	Yes	n/a
i-STAT1(318368)	i-STAT1	318368	Home/Uptown Hospital/UT.ICU	05/06/2016 09:42 AM	13685	Yes	n/a
i-STAT1(326194)	i-STAT1	326194	Home/Unassigned	05/06/2016 09:43 AM	9797	Yes	n/a
i-STAT1(302026)	i-STAT1	302026	Home/Unassigned	05/06/2016 09:43 AM	5268	Yes	n/a

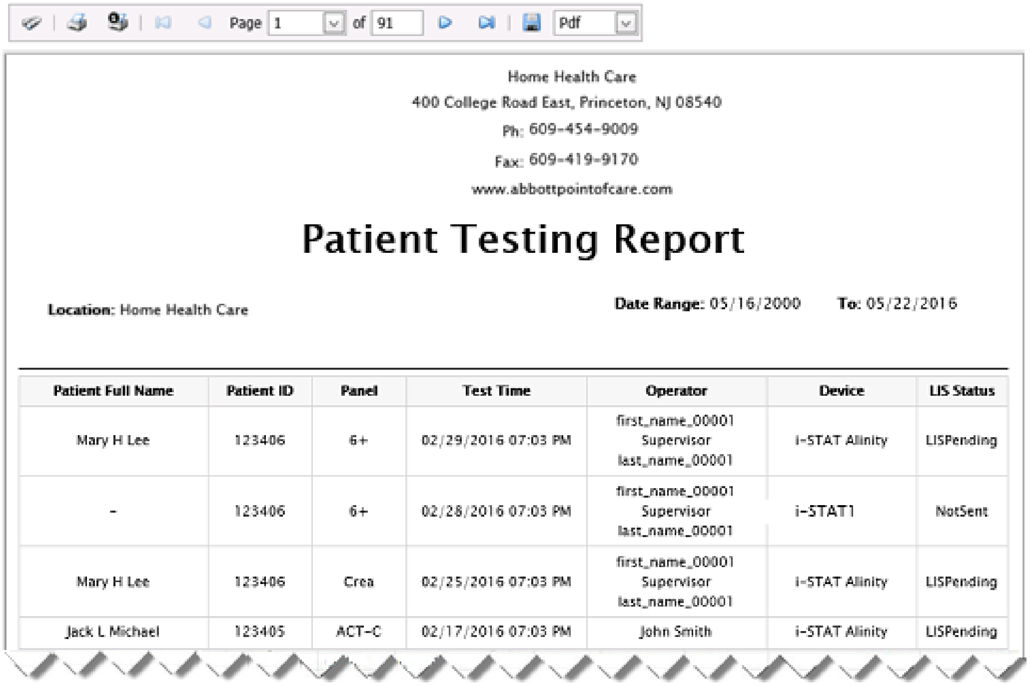
Total number of rows: 6

Report Created By: admin

Signature:

4. Use the controls at the top of the report to scroll through, print, and save the report. The report, similar to the Patient Testing Report shown, opens in a browser window.

Figure 1-28: Example of a report (Patient Testing Report)



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Home Health Care
400 College Road East, Princeton, NJ 08540
Ph: 609-454-9009
Fax: 609-419-9170
www.abbottpointofcare.com

Patient Testing Report

Location: Home Health Care **Date Range:** 05/16/2000 **To:** 05/22/2016

Patient Full Name	Patient ID	Panel	Test Time	Operator	Device	LIS Status
Mary H Lee	123406	6+	02/29/2016 07:03 PM	first_name_00001 Supervisor last_name_00001	i-STAT Alinity	LISPending
-	123406	6+	02/28/2016 07:03 PM	first_name_00001 Supervisor last_name_00001	i-STAT1	NotSent
Mary H Lee	123406	Crea	02/25/2016 07:03 PM	first_name_00001 Supervisor last_name_00001	i-STAT Alinity	LISPending
Jack L Michael	123405	ACT-C	02/17/2016 07:03 PM	John Smith	i-STAT Alinity	LISPending

Create a .CSV Report

Some reports, for example the Analyte Result Extract, are generated in .csv format. To create a report in this format, follow these steps:

1. While viewing a screen of results, select a test by highlighting it.
2. Click .
3. In the pop-up window, select the report from the drop-down list.
4. Click Generate.
5. When the report is produced, a message displays prompting to open or save the file.
6. Click **Save**.

Create a .ZIP Report

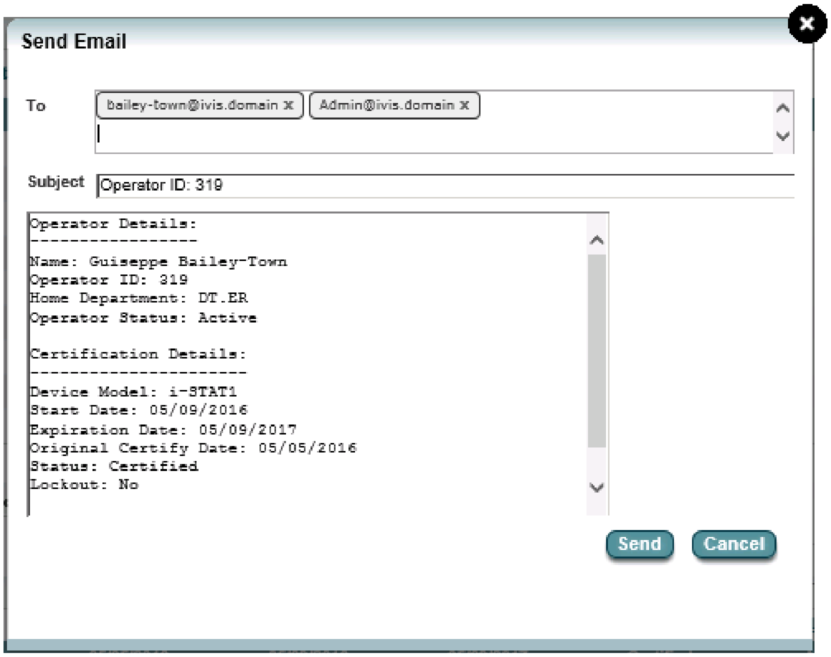
By default, a report such as the PV Data Extract, is generated in a .zip folder. To create a report in this format, follow these steps:

1. While viewing a display of test results, search desired test results by applying global and local filters.
2. Click .
3. In the pop-up window, select the report from the drop-down list. Then click **Generate**.
4. A zip folder is produced, and a message displays prompting you to open or save the file.
5. Click **Save**.

Email data

Many Info HQ Manager screens provide an email icon — — to manually send email messages pertaining to the information currently being displayed. These emails could contain either an attachment containing data for the selected item or plain text that Info HQ Manager inserts into the body and subject of the email message, as shown.

Figure 1-29: Example email message



Before emails can be sent, this functionality must be enabled and configured within the Info HQ Manager configuration. See the *Info HQ Manager Implementation Guide* for instructions on using the email configuration settings.

Follow these steps to manually send an email message:

Note: See *Display area* for information about List view and Alerts view.

1. If in List view, select the desired record, then click . If in Alerts view, click .

   The **Send Email** dialog box opens, as shown in *Figure 1-29: Example email message*. Info HQ Manager automatically populates the **Subject** field and, depending on the type of record selected, Info HQ Manager populates the body of the email message or inserts an appropriate attachment.
2. Complete the **To** field with one or more email addresses, separated by semicolons, to indicate who should receive the email.
3. Click **Send** to send the email.

1.7 Help

To display On Screen Help for the screen that is currently displayed, click at the top part of the screen (next to the date range). Then click **On Screen Help**.

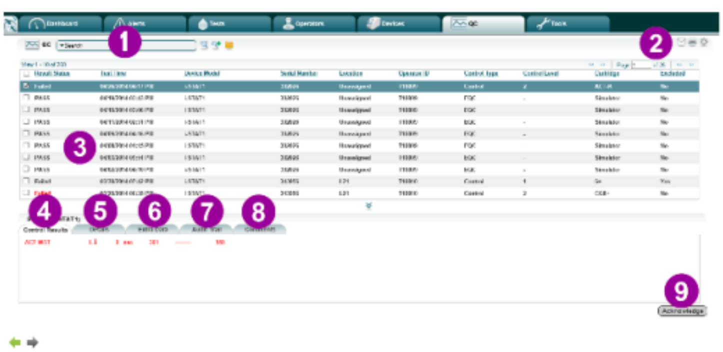
Figure 1-30: Example of On Screen Help

QC screen

Quality Control (QC) ensures that a given device and any cartridges it uses have been tested and shown to meet quality standards for reliable and accurate patient testing.

The QC screen displays detailed information about QC tests, such as the result status, the device model used, and the type of cartridge.

Screen tips



Item	Description
1	Search. See Control the display using Search for details.
2	Icons that perform tasks related to QC test results. Roll the mouse over an icon for a description, and see Usage for details about performing these and other tasks.
3	Results list. To narrow the display, select filtering criteria from the drop-down list. See Control the display using Search for details.
4	Control Results tab: Detailed panel-by-panel measurements for the test record that is selected in the main list.
5	Details tab: Detailed information about the test including type of test, time and date, operator information, device information, and associated alerts.
6	Extra Data tab: Additional data associated with the test record.
7	Audit Trail tab: Details about actions performed on this test record — including time and date, who updated the record, and other details.
8	Comments tab: Comments added to this test record. Use the **Add Comments** drop-down list or the adjacent text box to add new comments.
9	When a failed QC test is selected, click to acknowledge the alert associated with the failed QC test.

Some screens on which there are numerous entry fields, such as the **System Configuration** screen, also have tooltip help. Roll the mouse over a field name to display a pop-up tooltip with a brief description of the field.

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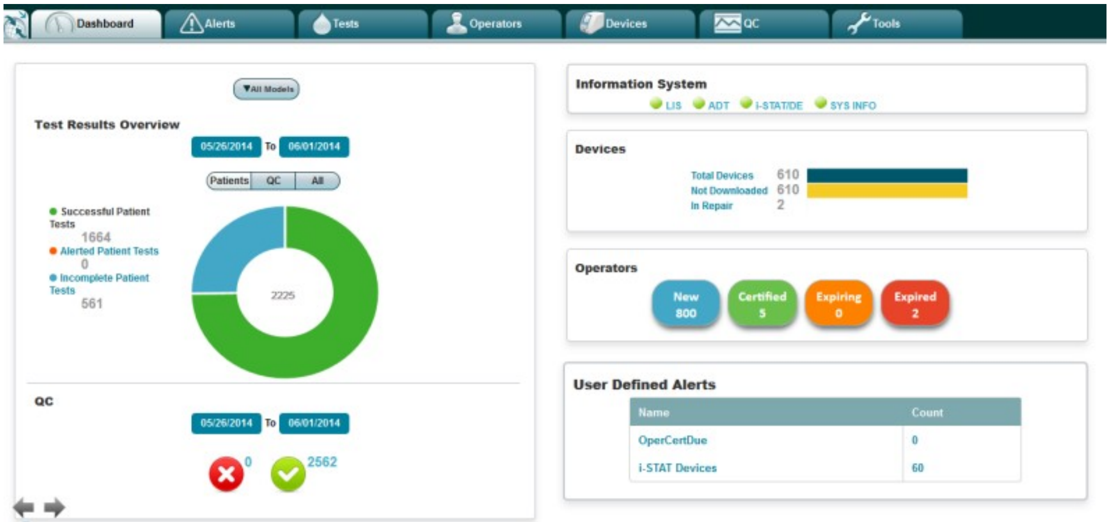
2 - Summary of the activity using the Dashboard

The Dashboard is the first screen that is displayed after login.

Figure 2-1: Dashboard screen



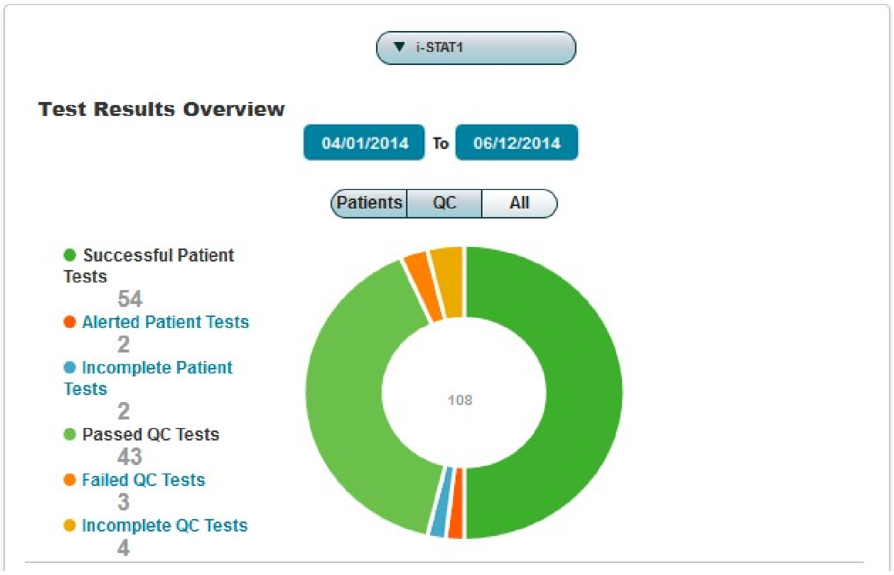
The Dashboard is one of the primary means of navigating to the major functional screens in Info HQ Manager. The screen is divided into six areas which provide an overall snapshot of the activity of the Info HQ Manager system based on the current location and date range (if applicable) that is set at the top-right of the screen. (For more information on how to change the current location, refer to *Set the location* in section 1, *Getting started*.)

The sections that follow describe each area in the Dashboard.

2.1 Test Results Overview area

The **Test Results Overview** area provides a summary of tests that have run for the current location and date range. (For more information on how to change the location or date range, see *Set the location* and *Change the date range* in section 1, *Getting started*.)

Figure 2-2: Test Results Overview area



There are three primary buttons in this area: **Patients**, **QC**, and **All**. When clicked, the **Patients** button displays a summary for patient tests; the **QC** button displays a summary for quality control (QC) tests; and the **All** button displays both the patient tests and QC tests summaries as shown in the illustration.

Use the filter drop-down list, at the top of the Test Results Overview area, to view data for tests that were run on a particular device model.

The following patient and QC summaries are displayed.

Table 2-1: Information displayed in the Test Results Overview area

Patient	
Successful Patient Tests	Number of patient tests that ran successfully.
Alerted Patient Tests	Number of patient tests that generated one or more alerts.
Incomplete Patient Tests	Number of patient tests that did not generate a result due to an error or an issue with the sample or device.
QC	
Passed QC Tests	Number of liquid control tests that were conducted and did not fail.
Failed QC Tests	Number of liquid control tests in which one or more analyte values did not meet the reference value range.
Incomplete QC Tests	Number of QC tests that did not generate a result due to an error or an issue with the sample or device.

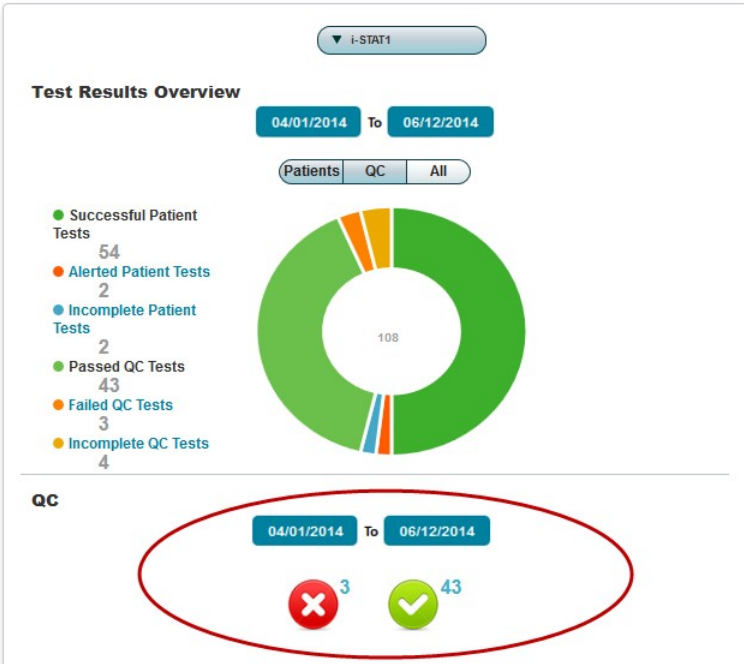
The summary headings, except for Passed Patient Tests and Passed QC Tests, are hyperlinks. When the hyperlinks are clicked, a screen listing the test results for that summary is displayed.

The color-coded chart to the right of the summary headings provides a visual summary of the tests. When patient test data and QC test data are displayed together, the patient tests are represented with darker colors than the QC tests.

2.2 QC area

The **QC** area, circled in *Figure 2-3: QC area*, provides a graph of the QC tests that were performed for the date range and location specified in the location breadcrumb at the top of the Info HQ Manager user interface.

Figure 2-3: QC area



The QC area displays the following information for all QC test results received from devices that are registered in the Info HQ Manager system:

Table 2-2: Information displayed in the QC area

	Number of liquid control tests that failed. This means that the test was out of range.
	Number of liquid control tests that did not fail — for example, with a status of *passed*.

Use the filter drop-down list, at the top of the Test Results Overview area, to view data for QC tests that were run on a particular device model.

2.3 Information System area

The **Information System** area provides the status of connections with information systems: for example, green indicates that a connection is working properly and red indicates that a connection is not working as expected.

Figure 2-4: Information System area

The following connection indicators are displayed:

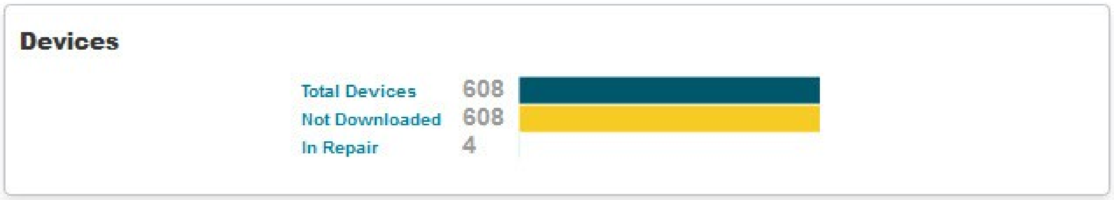
Table 2-3: Information displayed in the Information System area

Column	Description
LIS	• Green: The Info HQ Manager system is connected to the LIS. • Red: There was an issue with establishing the connection to the LIS.
ADT	• Green: The Info HQ Manager system is connected to the Admission, Discharge, & Transfer (ADT) system. • Orange: The Info HQ Manager system has received no patient data within the time period specified in the *HIS Allowable Inactivity Period* configuration setting. • Red: The connection to the ADT has been stopped by the user.
i-STAT/DE	• Green: The Info HQ Manager system is connected to i-STAT/DE, the web service that provides communication and customization support for i-STAT 1 devices. • Red: There was an issue with the connection to i-STAT/DE.
SYS INFO	• Green: There are no system-related alerts, such as service down. • Red: There is at least one system-related alert.
A gray indicator indicates that Info HQ Manager is not currently configured to communicate with that type of information system.	

2.4 Devices area

The Devices area provides a summary of the devices associated with the Info HQ Manager system.

Figure 2-5: Devices area



The following information is displayed:

Table 2-4: Information displayed in the Devices area

Column	Description
Total Devices	Number of total devices registered in Info HQ Manager.
Not Downloaded	Number of devices that have not downloaded test data in the defined period of time; the default is 24 hours. (See the *Info HQ Manager Implementation Guide* section on system configuration settings for steps on how to change the default setting.)
For Repair	Number of devices unavailable while out for repair.

2.5 Operators area

The **Operators** area provides a summary of operators and operator certifications.

Figure 2-6: Operators area

The following information is displayed:

Table 2-5: Information displayed in the Operators area

Column	Description
New	Number of active operators who have not been assigned one or more certification policies.
Certified	Number of active operators with one or more normal certifications to operate a device.
Expiring	Number of operators having one or more certifications that will expire soon. The number of days until expiration is set to 30 days by default. To change this setting, see *Change the notification time for expiring certifications* in section 5, *Operator management*.
Expired	Number of operators with one or more certifications that have expired.

2.6 i-STAT Alinity Cartridge Lots area

The **i-STAT Alinity Cartridge Lots** area provides a summary list of all cartridge lot QC activity. This feature is only displayed on the Dashboard screen when Cartridge Lot QC Enabled is set to Yes in the Info HQ Configuration. Yes is the default value for this configuration setting.

Figure 2-7: i-STAT Alinity Cartridge Lots area

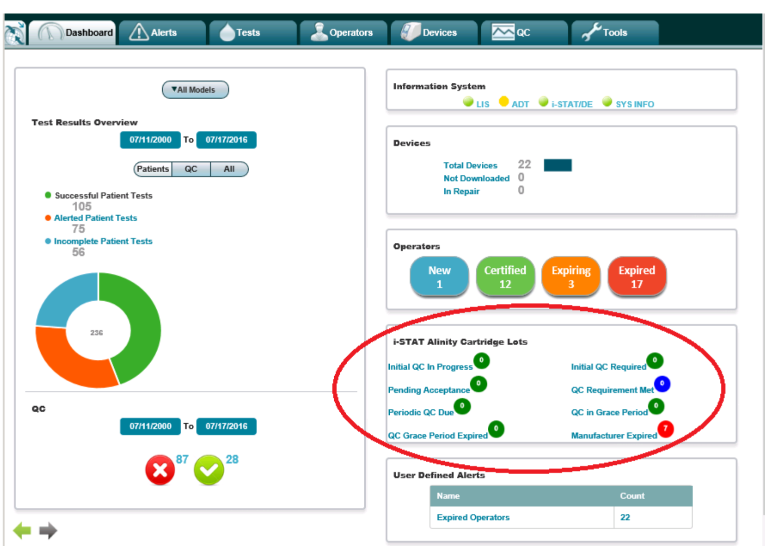


Table 2-6: Information displayed in the i-STAT Alinity Cartridge Lots area

Column	Description
Initial QC In Progress	Initial QC testing is in progress within the QC credit window.
Initial QC Required	Not all passed initial QC tests are received with test time within the QC credit window.
Pending Acceptance	All of the initial test criteria are met, and acceptance is pending a manual action in the Info HQ Manager system.
QC Requirement Met	All of the QC testing criteria are met and accepted.
Periodic QC Due	Start date of the next periodic QC testing for the cartridge lot.
QC in Grace Period	The period between the Periodic QC Due time and the QC Grace Period Expired during which cartridge lot can still perform patient test.
QC Grace Period Expired	The QC testing due date and time have passed, and the grace period for completing the QC has expired.
Manufacturer Expired	The manufacturer's expiration date has passed, and the lot will not be uploaded to devices.

2.7 User-Defined Alerts area

The **User-Defined Alerts** area provides a summary list of all user-defined alerts. A user-defined alert is the result of a saved search for which an alert is generated whenever an event occurs that meets the search criteria.

For information about creating a user-defined alert, see *Create user-defined alerts* in section 3, *Alert management*.

Figure 2-8: User-defined alerts area

The following information is displayed:

Table 2-7: Information displayed in the User-Defined Alerts area

Column	Description
Name	Name assigned to the user-defined search.
Count	Number of results returned based on the search criteria of the user-defined alert.

Each alert in the list is an active hyperlink. When the hyperlink is clicked, the system displays the appropriate Info HQ Manager screen and the specific results associated with the alert.

3 - Alert management

The instructions in this section describe how to view centralized common alerts and how to handle them. An *alert* indicates a condition that should be reviewed by the POCC or another authorized user.

Info HQ Manager provides notification for nine types of alerts. Each type is represented by a button on the **Alerts** screen. The **User Defined Alerts** button in the **Alerts** screen can contain any number of alerts as defined by users of the Info HQ Manager system.

The following describes details about each alert button on the **Alerts** screen:

- Icons on the buttons are color-coded: green indicates no alert, red indicates alerts, and yellow indicates situations that will soon require intervention.

  Buttons have a counter that specifies the number of alerts associated with the alert type. The exception is the **User Defined Alerts** button, whose counter specifies the number of user defined alerts that exist, not the number of alerts within them.

- Buttons are dimmed when there are no alerts for that type. The exception is **User Defined Alerts**, which is dimmed when no user-defined alerts have been created.

Figure 3-1: Initial alerts screen

3.1 Types of alerts

The following table provides a description of the various alert types.

Table 3-1: Types of Alerts

Alert	Description
Out of Range Tests	Patient tests with one or more analytes that are out of range. Depending on system configuration. Click the button to see details of the results or to acknowledge the alert. The test results, by analytes displayed. Depending on the information available from the device, the results for each analyte may include one or more of the following: the values returned for the analyte along with any flags, the units, and the expected "normal" reference ranges. Analyte values within the expected normal range are represented by a black line showing the values at both ends of the normal range, and a green marker showing the value returned. pH (98.1 F) 7.358 7.31 — 7.41 Analyte values that are out of range, but not critical, are shown in red with a flag consisting of an arrow and an H or L indicating whether the value is high or low. sO2 H ↑ 100 % 95 — 98 Glu L ↓ 46 mg/dL 70 — 105 Analyte values that are critically out of range are shown in red with a flag consisting of a double arrows and CH (critical high/action high) or CL (critical low/action low) in a red rectangle. Critical high and critical low values are reported by i-STAT Alinity devices only. TCO2 CH ↑↑ 37 mmol/L 23 — 27 PCO2 (37C) CL ↓↓ 17.6 mmHg 35 — 45
Device Alerts	Devices with one or more alerts, such as No Downloading Activity or Unassigned Location.
Invalid Patient IDs	Patient tests where the patient ID is invalid or missing, as Patient ADT is not supported.
Failed QCs	Liquid control tests that have failed.
LIS Rejected	Test results that were sent to the LIS but that were rejected. Click the button to review, correct patient ID, acknowledge, enter comments, and resend a result.

Alert	Description
Disconnected Information Systems	Connection failures to an external information system, including LIS or HIS.
Operator Certification Expired	Operators with a device certification that has expired.
Operator Certification Due	Operators with device certifications that will soon expire.
User-Defined Alerts	Existence of any user-defined alerts.

3.2 View alerts

To view an alert:

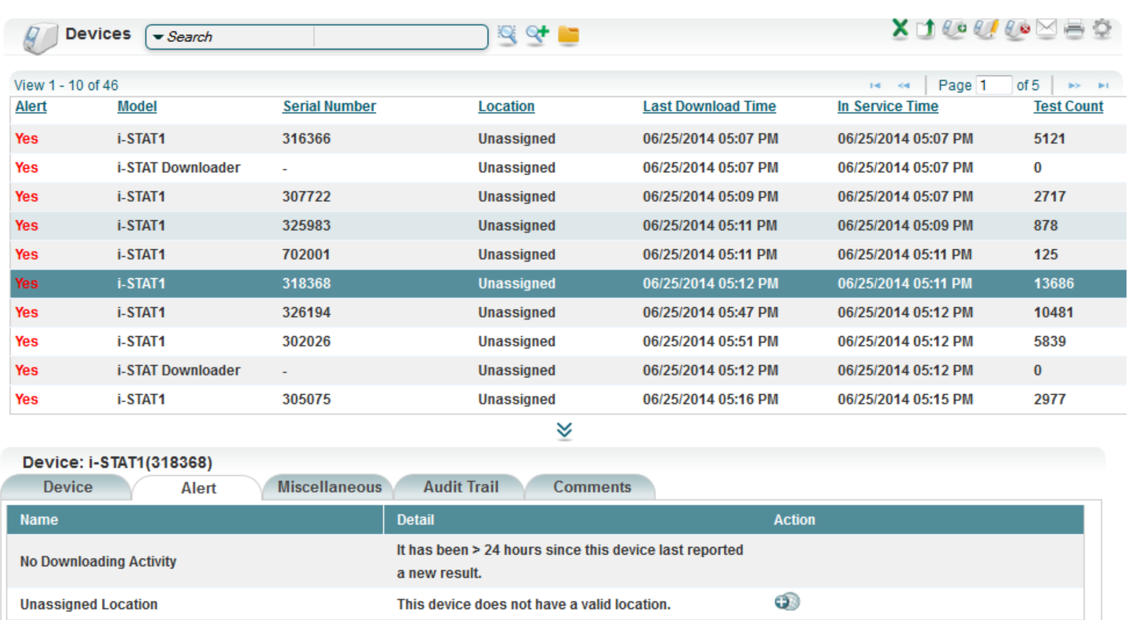
1. Click the Alerts tab to display the initial **Alerts** screen with the nine alert buttons, as shown in *Figure 3-1: Initial alerts screen*.

Note: If the number of alerts for a specific alert type is zero (0), the alert button will be dimmed and disabled. (The exception is the **User Defined Alerts** button, which is dimmed and disabled when no user-defined alerts have been created.)

2. Click the alert button for the type of alert to view.

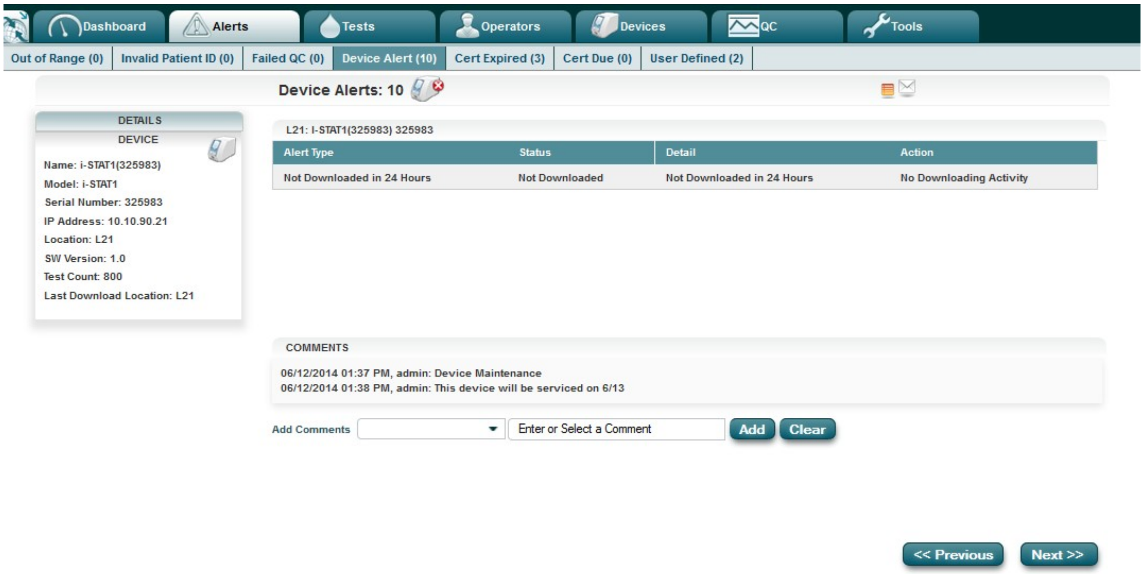
By default, the List view displays all objects of the selected type (for example, devices or operators) that currently have alerts. For devices, the Alerts tab at the bottom of the screen displays details about all alerts that exist for the device that is selected in the list.

Figure 3-2: List view for devices with alerts



Note: Use the *Show Alert Screen* configuration setting to display the Alerts view, instead of the List view, when a button is clicked on the initial **Alerts** screen. (Note that **User Defined Alerts** always displays the List view.) For more information, see the *Info HQ Manager Implementation Guide* section on system configuration settings.

Figure 3-3: Alerts view for a device alert



In the Alerts view, use the **Next** and **Previous** buttons to display other alerts of the same type. Use the secondary tabs to display other types of alerts. Click to switch to the List view for the selected alert type.

3.3 Add a comment

Add one or more comments to a record with an alert. Add a new comment or choose from a list of recently added comments and predefined comments. Refer to *Add comments* in section 1, *Getting started*, for steps on how to add comments.

3.4 Acknowledge alerts

Note: Acknowledging alerts does not send the information to the LIS. For more information on sending results to the LIS, refer to *Send test results to the LIS*.

Acknowledging an alert indicates that it has been formally reviewed by the POCC or an authorized Info HQ Manager user. The following types of alerts can be reviewed and acknowledged:

- Out of Range
- Invalid Patient ID
- Failed QC

Patient test results or QC tests with alerts have an alert status of either Unacknowledged or Acknowledged. The following table describes these alert statuses.

Table 3-2: Alert statuses

Alert Status	Description and behavior
Unacknowledged	Patient test results or QC tests that have an alert but have not been acknowledged by the POCC or an authorized user.
Acknowledged	Test results that have an alert and have been acknowledged by the POCC or an authorized user. • All alerts associated with the test result are acknowledged • Test result will no longer be displayed on the corresponding alerts screens for patient tests or failed QC tests but can be viewed using the Search filter (Alert Status = Acknowledged) • Test result will continue to display on the corresponding Tests and QC tabs but the Acknowledge button will be dimmed (inactive) • Test result will no longer be included in the alert counts on the Dashboard and Alerts tabs

The steps to acknowledge an alert vary slightly depending on the type of alert. The following sections provide instructions on how to acknowledge the different types of alerts.

Acknowledge an Out of Range alert

Note: Refer to *Acknowledge alerts* in this section before performing this procedure to understand the behavior of acknowledging alerts.

Info HQ Manager generates an Out of Range alert whenever a patient test produces one or more results outside the expected range.

Test results with an Out of Range alert can be viewed on the **Out of Range** screen. To acknowledge a test result with an Out of Range alert:

1. Click the Alerts tab, then click the **Out of Range Tests** alert button.
2. Using the **Previous** and **Next** buttons, select the test result to be acknowledged.
3. Click **Acknowledge**.
4. In the dialog box, click **OK** to acknowledge the alert and remove it from the list.

Acknowledge an Invalid Patient ID alert

Note: Refer to *Acknowledge alerts* in this section before performing this procedure to understand the behavior of acknowledging alerts.

Info HQ Manager generates Invalid Patient ID alerts for all test results that contain an invalid patient ID. A patient ID is invalid, for example, when it is blank or when it contains the Invalid Patient ID Pattern specified in the Info HQ Manager system configuration settings.

Test results with an Invalid Patient ID alert might also have other alerts associated with them, such as Out of Range alerts. Test results with an invalid patient ID can be viewed on the **Invalid Patient ID** screen.

To acknowledge an Invalid Patient ID alert:

1. Click the Alerts tab, then click the **Invalid Patient IDs** alert button to display the **Invalid Patient ID** screen. Using the **Previous** and **Next** buttons, select the test result to be acknowledged.

2. If the correct patient ID is known, update the record with the correct ID as follows:
   a) Click .
      The **Patient Search** dialog box opens.
   b) From the drop-down list, either select Patient ID and enter the patient ID number, OR select Patient Name and enter all or part of the first or last name of the patient.
   c) Click **Search**.
      A list of patients matching the entered search string is displayed.
   d) Select the appropriate patient and click **OK**.
      The Patient ID field updates with the appropriate patient ID.
3. Click **Acknowledge**.

   Note: Info HQ Manager does not automatically send test results with an invalid patient ID to the LIS. If the patient ID was corrected in step 2, the test result might need to be sent to the LIS. In this case, click **Send to LIS** rather than **Acknowledge**. This action acknowledges the alert *and* sends the test results to the LIS in a single step.

Acknowledge a Failed QC alert

Note: Refer to *Acknowledge alerts* in this section before performing this procedure to understand the behavior of acknowledging alerts.

Info HQ Manager generates a Failed QC alert whenever a quality control (QC) test fails. The Failed QC screen displays detailed results of all such tests. To acknowledge failed QC alerts:

1. Click the Alerts tab, then click the **Failed QCs** alert button.
2. Using the check boxes, select one or more QC tests to be acknowledged.
3. Click **Acknowledge** at the bottom of the screen.

Acknowledge a Device alert

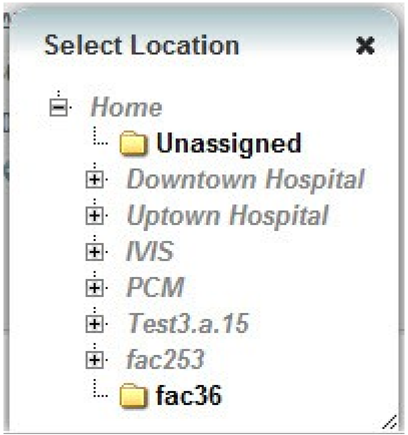
A Device alert can be acknowledged by correcting the situation that caused the alert.

1. Click the Devices tab.
2. In the List pane, select a device that has an active alert.
3. In the Details pane, click the Alert tab to display a list of active alerts for the device. Common causes for Device alerts include:

Unassigned Location	The device does not have a valid location. To correct, proceed to step *4*.
No Downloading Activity	It has been more than defined period of time (the default is 24 hours) since the device last reported a new result. To correct, verify that the device is connected properly and that it is able to send results. This alert is not applicable for the i-STAT downloader.

4. Click  in the Details pane to display the Select Location pop-up.

Figure 3-4: Select Location pop-up



5. Click the plus icon to expand the location hierarchy until the desired location is listed, then click the location to select it.

   The device's location is updated, and the Unassigned Location alert is acknowledged and cleared.

Acknowledge an Operator alert

An Operator alert is generated when an operator's certification expires or is about to expire. An Operator alert can be acknowledged by recertifying the operator.

For information about recertifying operators, see *Recertify an individual operator* and *Recertify a group of operators* in section 5, *Operator management*.

3.5 Send test results to the LIS

Info HQ Manager has several ways of sending patient test results to the Laboratory Information System (LIS). Sending a test result to the LIS also acknowledges all alerts that are associated with the test result.

Refer to *Send patient test results to the LIS* in section 4, *Test results management*, for information about how to send test results to the LIS.

3.6 Create user-defined alerts

On many Info HQ Manager screens, the results of a search can be saved as a *user-defined alert*. When this is done, an alert status is set for current and future test results that meet the search criteria.

Notification of these alerts can be viewed on the User Defined Alerts screen.

To create a user-defined alert, follow these steps:

1. With the appropriate results displayed, use the Search filter options to search the results as desired.

Figure 3-5: Example of setting filter options for a search

For example, in the **Operators** screen, a search could be defined to show all operators whose certification has expired.

2. Click .
A pop-up opens, for saving the search criteria.

Figure 3-6: Add to User Defined Alert pop-up

3. Check the **Add to User Defined Alert** box so that alerts can be generated.
4. Enter a name for the user-defined alert that will be associated with this saved search. Names for user-defined alerts can consist only of letters, numbers, and spaces.
5. Click **Save**.

The search and its associated alert are saved. Click the **Saved Searches** icon — — to display the list of saved searches, including the one just saved.

To view the results of the search at any time, open the **User Defined Alerts** screen and click the name of the saved search.

Note: When a search is saved as an alert, all the search criteria, including the search date range is saved with the alert. Accessing the user-defined alert from the Dashboard or the User-Defined Alert page will retrieve results based on the current global date range.

To delete a user-defined alert, navigate to the tab associated with the alert, click , and click the red next to the alert.

4 – Patient test results management

Use the Tests screen to review all patient test results, details, associated comments, and LIS transfer status. This section describes how to manage patient test records to monitor which devices are generating what type of patient test results, when tests were conducted, and whether a test result has an alert.

4.1 View patient test results

Click the Tests tab to display the Tests screen (shown in *Figure 4-1: Tests screen overview*) and review the patient test results based on the current location and date range settings at the upper-right of the Info HQ Manager screen. For more information on how to change the location or date range, see *Set the location* and *Change the date range* in section 1, *Getting started*.

Figure 4-1: Tests screen overview

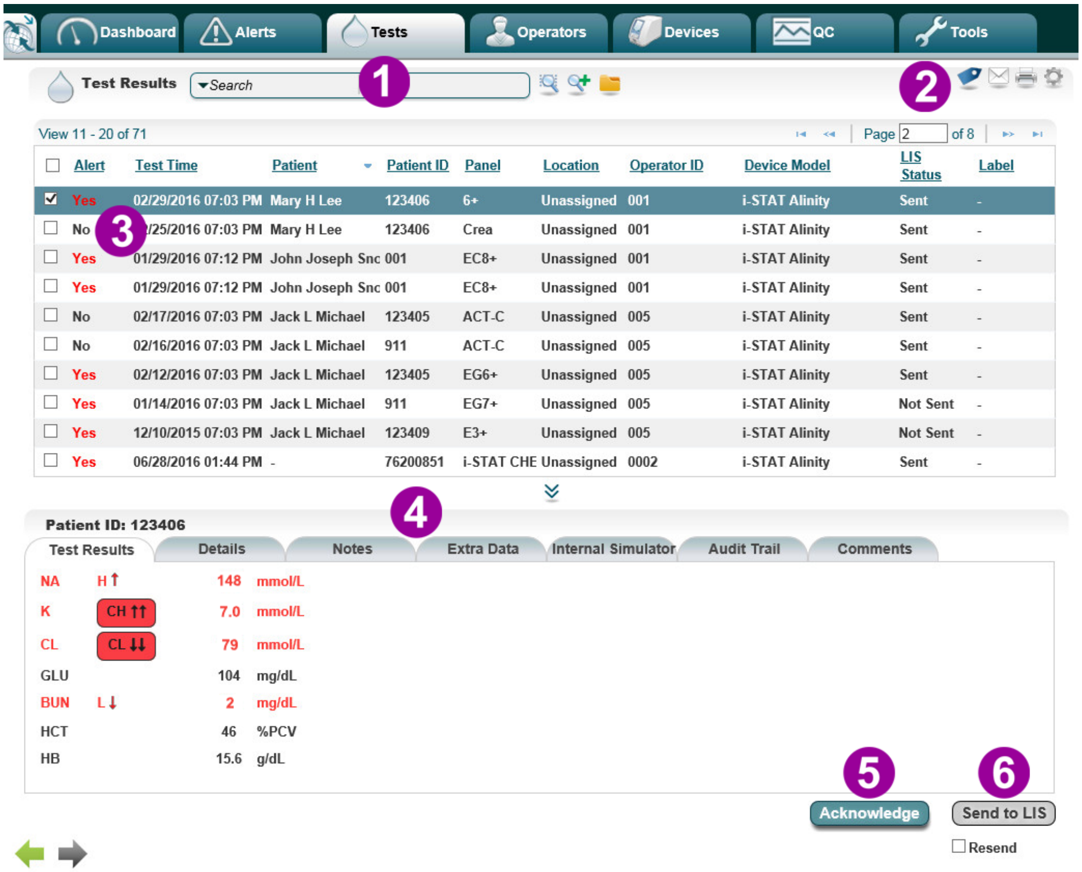


Table 4-1: Tests screen overview

1	Search. See *Filter the results* and *Filter results using search strings* for more information.

2	Icons that perform tasks related to patient test results. Roll the mouse over an icon for a description.
3	Results list. To narrow the display, select filtering criteria from the Search drop-down list.
4	• **Test Results tab:** Results for the test that is selected in the main list. • **Details tab:** Additional details about the test record that is selected in the main list ─ including patient information, operator information, cartridge information, alerts, and LIS status. • **Notes tab:** (i-STAT Alinity only.) Any comments entered by users before, during, or after running a test. • **STATNotes tab:** (i-STAT 1 only.) Additional notes about the test and test result. • **Extra Data tab:** Additional data associated with the test record, including internal simulator information for i-STAT 1. • **Internal Simulator tab:** (i-STAT Alinity only.) Displays the results from i-STAT Alinity's internal simulator. • **Audit Trail tab:** Events associated with the selected patient test record. See *View the audit trail* for more information • **Comments tab:** A list of comments that were added to the selected test record. New comments can also be added. See *Add comments* for more information.
5	Click to acknowledge the selected test result. Acknowledging a test result removes it from the alerts list but does not send the test result to the LIS.
6	Click to send the selected test result to the LIS. **Note:** If the test result was previously sent to the LIS, check the Resend box to activate the Send to LIS button. Then click Send to LIS.

List pane

The Tests tab displays the following information for each test:

Alert	Whether there is an alert for the test result.
Test Time	Date and time the test was conducted. By default, test results are sorted by the Test Time, in descending order (the most recent test is first in the list).
Patient	Name of the patient on whom the test was conducted.
Patient ID	ID of the patient on whom the test was conducted.
Order Number	LIS order number associated with the specified test and patient.
Panel	Cartridge panel for the test.
Location	Location of the device on which the test was conducted.
Operator Name	Name of the operator who conducted the test.

Operator ID	ID of the operator who conducted the test.
Cartridge	Type of cartridge used to conduct the test.
Device Model	Model of the device used to conduct the test.
LIS Status	Whether the test result was sent to the LIS.
Label	A label assigned to the test result — for example *follow up*.

Sort the test results

Use the column headings to sort the list of patient test results. For more information about how to sort, see *Sort the results* in section 1, *Getting started*.

Scroll or search for a test result

The list of patient test results on the Tests tab might span multiple pages. If a patient test record is not listed on the first page, use the widget for selecting pages, shown here.

Figure 4-2: Widget for selecting pages

Use the widget, located near the upper-right of the **Tests** screen, to scroll through the pages until the desired test result is displayed. The arrows with the vertical lines allow clicking to the beginning or end of the list. The double arrows click forward or backward to the next page.

If there are too many pages of test results, use the search option to search the list of test results based on:

Acknowledged	For test results with associated alerts, whether the alerts have been acknowledged.
Alert	Whether alerts are associated with the test results.
Cartridge Lot No.	Lot number for the cartridge used to conduct the test.
Cartridge Type	Type of cartridge used to conduct the test.
Device Model	Model of the device used to conduct the test.
Device Serial No.	Serial number of the device used to conduct the test.
Label	A label assigned to the test result — for example *follow up*.
LIS Status	Whether the test result was sent to the LIS.
Operator Certified	Whether the operator who conducted the test is properly certified.
Operator ID	ID of the operator who conducted the test.
Operator Name	Name of the operator who conducted the test. Enter a full name or a partial name for the search, in FirstName LastName format (no middle name).

Order Number	LIS order number associated with the specified test and patient.
Patient DOB	Date of birth for the patient on whom the test was conducted.
Patient ID	ID of the patient on whom the test was conducted.
Patient Name	Name of the patient on whom the test was conducted. Enter a full name or a partial name for the search, in FirstName LastName format (no middle name).

For further information and steps on how to perform a search, refer to *Filter the results* and *Filter results using search strings* in section 1, *Getting started*.

View all acknowledged or unacknowledged test results

Use Info HQ Manager to view acknowledged and unacknowledged test results.

Note: Acknowledging a test result removes it from the alerts list but does not send the test result to the LIS. Acknowledged test results will continue to be displayed when viewing test results on the Tests tab, but the Alert Status will be set to *No*.

To view a list of acknowledged or unacknowledged test results, perform these steps:

1. Click the Tests tab.
2. Click the **Test Results** Search drop-down list and choose **Acknowledged**.
3. Click the drop-down list next to **Acknowledged**, choose one of the following:
   - **Yes** to view a list of all acknowledged test results.

Figure 4-3: Viewing acknowledged test results

   - **No** to view a list of all test results that have not yet been acknowledged.

Figure 4-4: Viewing test results that are not acknowledged

A list of acknowledged or unacknowledged test results is displayed, depending on the selection made in step *3*.

For more information on how to acknowledge test results with an alert, refer to the following sections within Section 3: Alert Management:

- *Acknowledge an Out of Range alert*
- *Acknowledge an Invalid Patient ID alert*

To return to the original test results view, click the **Tests** tab again.

4.2 Correct an invalid patient ID in test results

Patient test results might contain an invalid patient ID. A patient ID is invalid, for example, when it is blank or when it does not match the pattern specified in the Info HQ Manager system configuration settings.

Info HQ Manager generates Invalid Patient ID alerts for all test results that contain an invalid patient ID. These test results might also have other alerts associated with them, such as Out of Range alerts.

Updating a test results record with a correct patient ID involves acknowledging the Invalid Patient ID alert (and any other alerts associated with the test results record). For steps on how to correct and acknowledge test results with an invalid patient ID, see *Acknowledge an Invalid Patient ID alert*.

4.3 Send patient test results to the LIS

Info HQ Manager sends patient test results to the LIS either automatically or as the result of an action by an Info HQ Manager user.

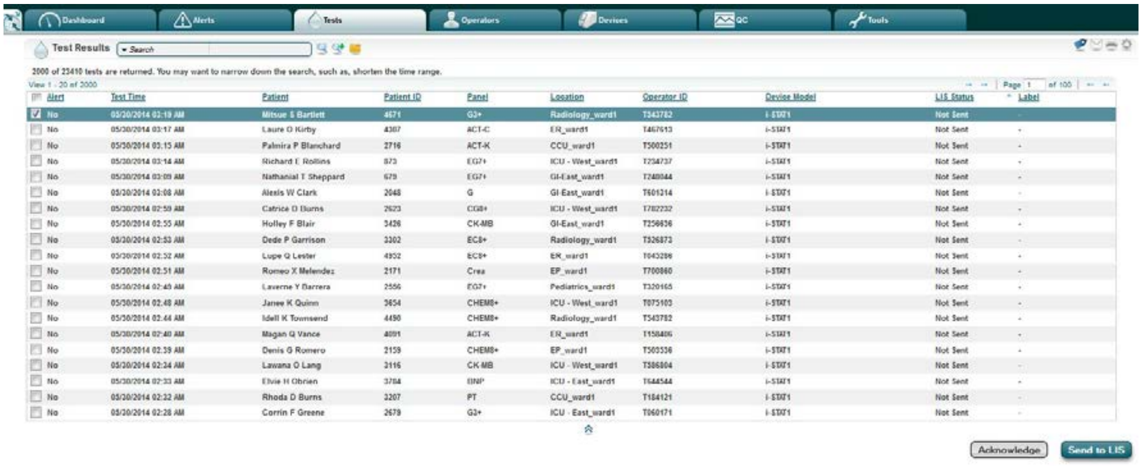
Table 4-2: Methods to send patient test results to the LIS

Method	Description and behavior
Automatic Send	Info HQ Manager automatically sends patient test results to the LIS based on system configuration settings. Test results are sent as soon as Info HQ Manager receives them.
Manual Send	The Info HQ Manager user selects the test and clicks the **Send to LIS** button. If a test result has an invalid patient ID, the Info HQ Manager user can correct the invalid patient ID and then send the test results manually.

Follow these steps to send test results to the LIS manually:

1. Click the Tests tab to display a list of patient test results.

Figure 4-5: List of patient test results



2. Select a test result to send to the LIS by clicking the check box to its left.
3. If a test result is selected, and that test result was previously sent to the LIS, check the **Resend** box to activate the **Send to LIS** button.
4. Click **Send to LIS**.
5. Click **Yes** in the confirmation box.

The selected test results are sent to the LIS. The test results remain in the display. The value in the **LIS Status** column changes to *Pending*. The value then refreshes indicating where the test results are in the process of transferring to the LIS. See the following table for information about the LIS transfer status messages that are displayed in Info HQ Manager.

Table 4-3: LIS status messages

LIS transfer status	Description
Pending	The test results are queued for sending to the LIS.
Awaiting Response	The test results have been sent, and Info HQ Manager is waiting for an acknowledgement from the LIS to indicate they were received.
Sent	The LIS has indicated that the test results have been received and accepted without error.
Rejected	The LIS has received the test record, but cannot process it.
Not Sent	The test record was not successfully sent manually or automatically.

4.4 Add or remove patient test result labels

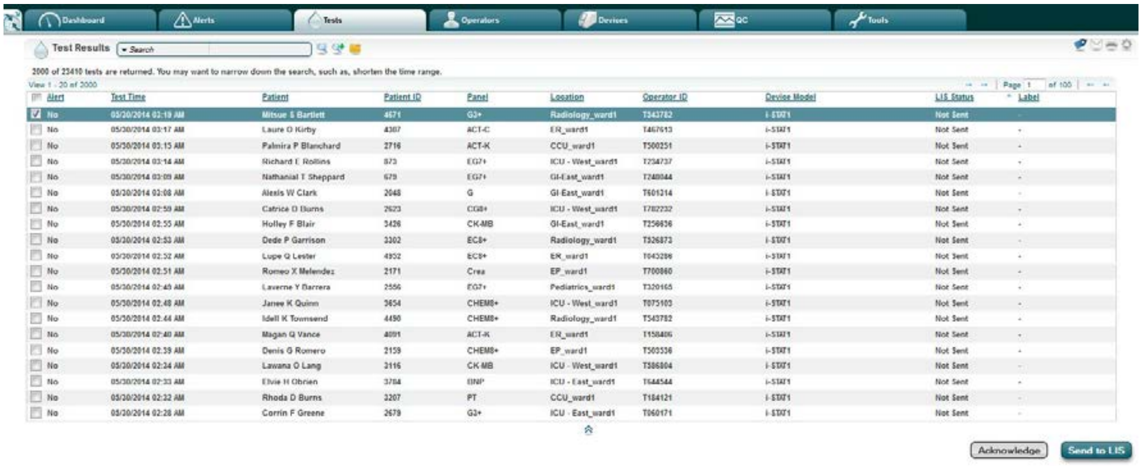
Labels are particularly useful in reminding a POCC or authorized user that a patient test result requires further action. Labels are available only for patient test results, not for QC results. While there is no specific limit to the number of labels that can be created, the number of different colors available for labels is 16.

A single label can be added to a patient test result. If a label has already been added to the patient test results, adding a different label will replace the existing one.

To add a label to a patient test result, perform the following steps:

1. Click the Tests tab to display a list of patient test results.

Figure 4-6: List of patient test results



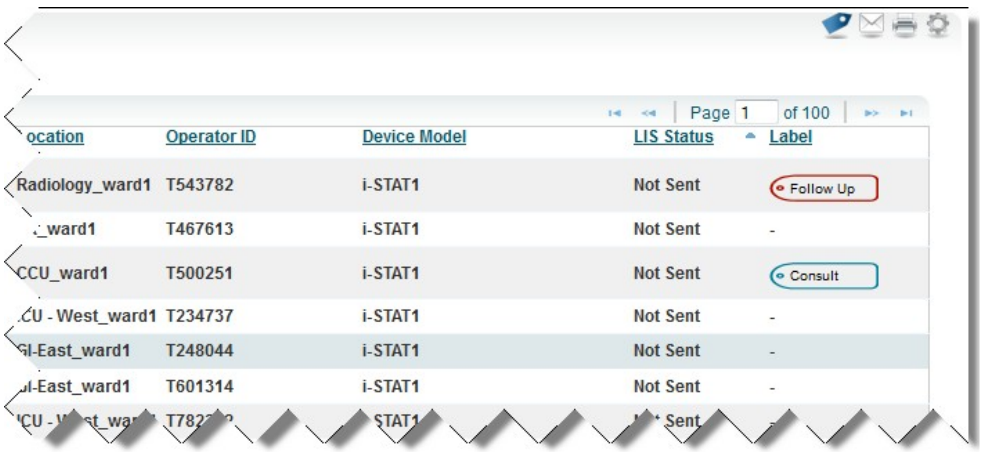
2. Check the boxes to the left of the Alert column for one or more test results.

3. Click  in the upper-right corner of the display.
   The Labels pop-up box displays the available labels to add.

Figure 4-7: Labels pop-up box

4. Click a label to add it to the test result. The label is added, as shown.

Figure 4-8: List of patient test results with labels



To remove a label from a test result:

1. Select the test result with a label to be deleted.

2. Click  to display the Labels pop-up window.

3. Click **Remove Label**.

4.5 Generate a patient test results report

Reports — based on search filters, the current date range, and the selected location (if applicable) — can be generated from the main screens within Info HQ Manager.

Info HQ Manager generates reports for patient test results as listed in the following table.

Table 4-4: Patient test reports

Report type	Description
Extended Patient Test Result Report	All information associated with the selected patient test result including Test Results, Details, Critical Notification, STATNotes, Extra Data, Audit Trail, and Comments.
Patient Test Result Report	Results of the selected patient test.
Patient Test Result List Report	All patient test results.
PV Data Extract Patient	Patient test results used for performance verification. **Note:** This report is available only if **PV Data Extract Enabled** is set to **Yes** in the system configuration settings.

To generate a report, follow the steps in *Generate a report* in section 1, *Getting started*

4.6 Export patient test results to a file

Info HQ Manager can export test results to a Microsoft® Excel® spreadsheet file, a comma-separated file, a PDF file or .zip folder. See the information in *Generate a report* in section 1.

5 - Operator management

This section provides instructions to manage operators and operator certifications on POCT devices.

5.1 View a summary of operators

Click the Operators tab to display the **Operators** screen and review a list of the operators in the Info HQ Manager system. If Operator Competency Management (OCM) is enabled, the Competency Tracker, Competency Profile, and Competency Criteria secondary tabs are also displayed.

Figure 5-1: Operators screen — OCM disabled

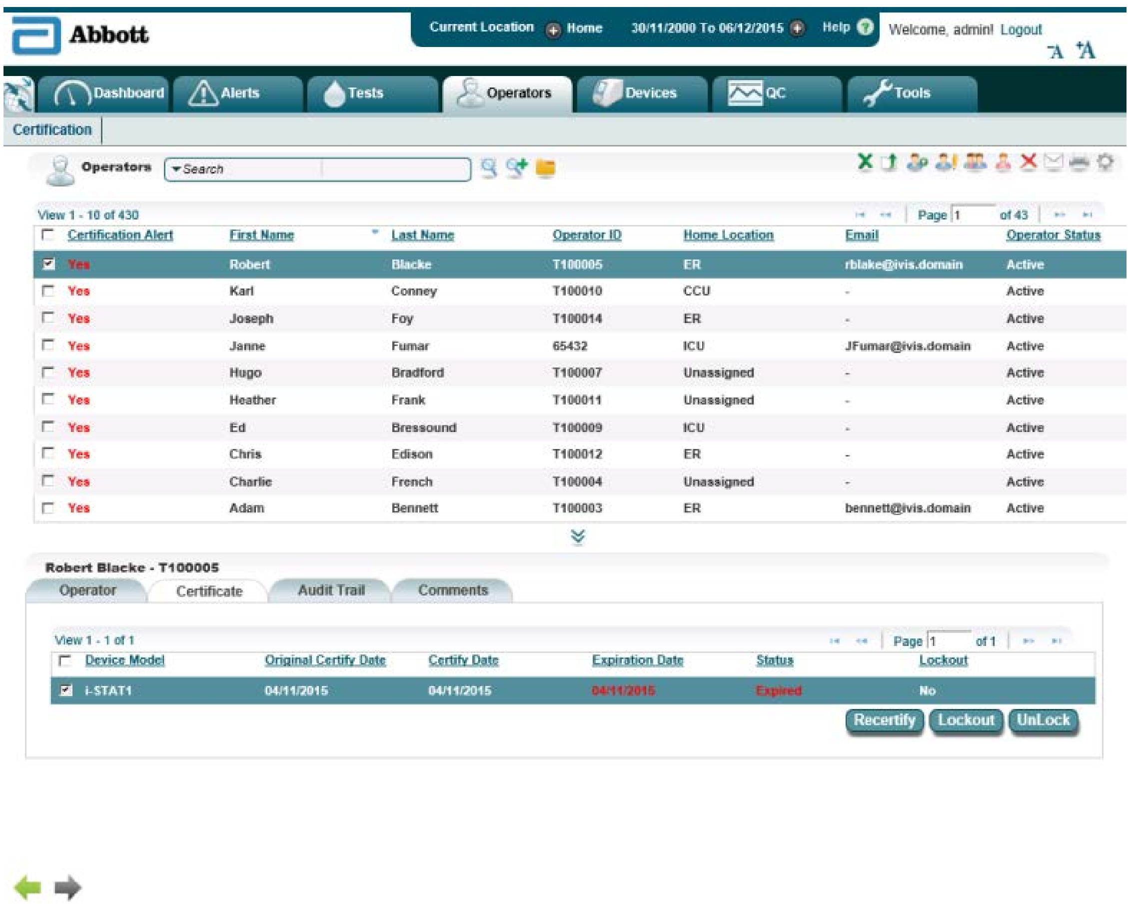
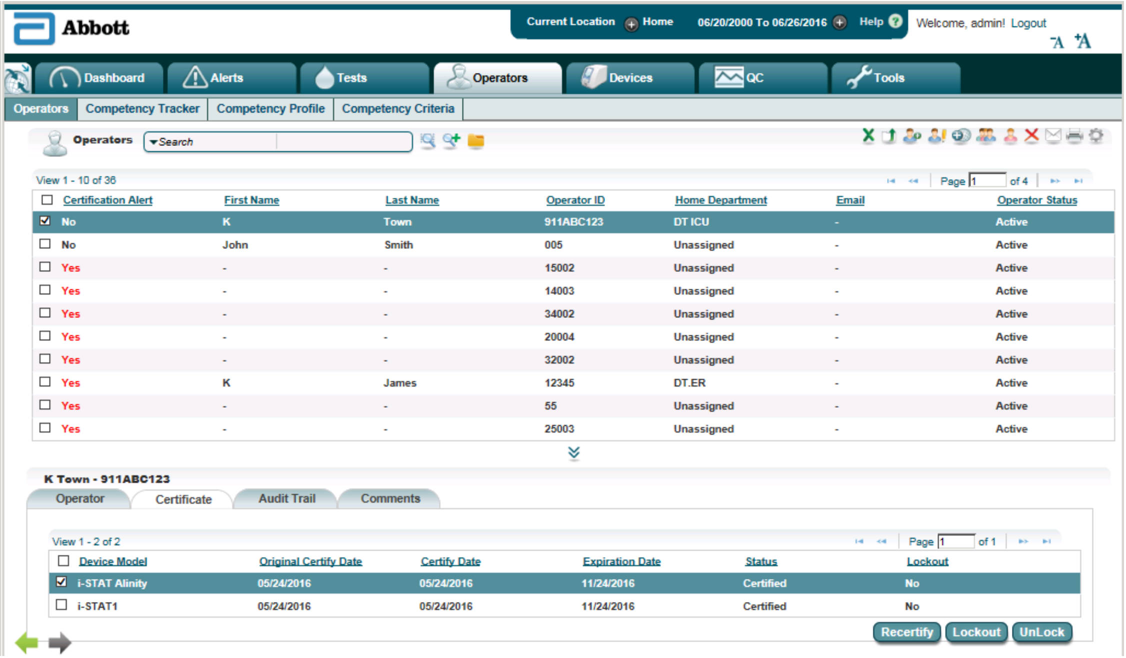


Figure 5-2: Operators screen — OCM enabled



Operators screen: Secondary tabs

When OCM is enabled, the Operators screen has secondary tabs that display and allow you to manage information about operators, competency tracking, competency profiles, and competency criteria.

- Operators secondary tab
- The List pane of the Operator secondary tab displays the following information about each operator:
- Basic information including the operator's name, ID, email address, and the home department where the operator works.
- Whether any certification alerts are associated with the operator.
- The operator's status: Active or Inactive.
- The Details pane of the screen has four tabs that display the following information:

Table 5-1: Operators secondary tab: Details pane

Tab	Description
Operator	Profile details about the operator.
Certificate	A summary of the operator's certifications — including status and expiration dates — along with management options to recertify the operator, prevent (lock) the operator from testing on a device model, and remove a lock.
Audit Trail	All changes made to the operator's data, for example an update made to the operator's email address or a change in the operator's certification status.
Comment	A list of all comments added to this record, and options to add new comments.

To display information for a subset of operators or to search for a particular operator in the Operators screen, refer to *Filter results using drop-down lists* and *Filter results using search strings* in section 1, *Getting started.*

Competency Tracker secondary tab

The List pane of the Competency Tracker secondary tab displays the following information about operator competencies:

- Operator ID
- Operator Name
- Home Department
- Competency Profile
- Competency Complete
- Window Start Date
- Window End Date
- Certification Expiration Date
- Device Model
- Certificate Phase
- Original Certified Date
- Last Certified Date
- Last Certified By
- Profile Source

Figure 5-3: Operators tab: Competency Tracker secondary tab

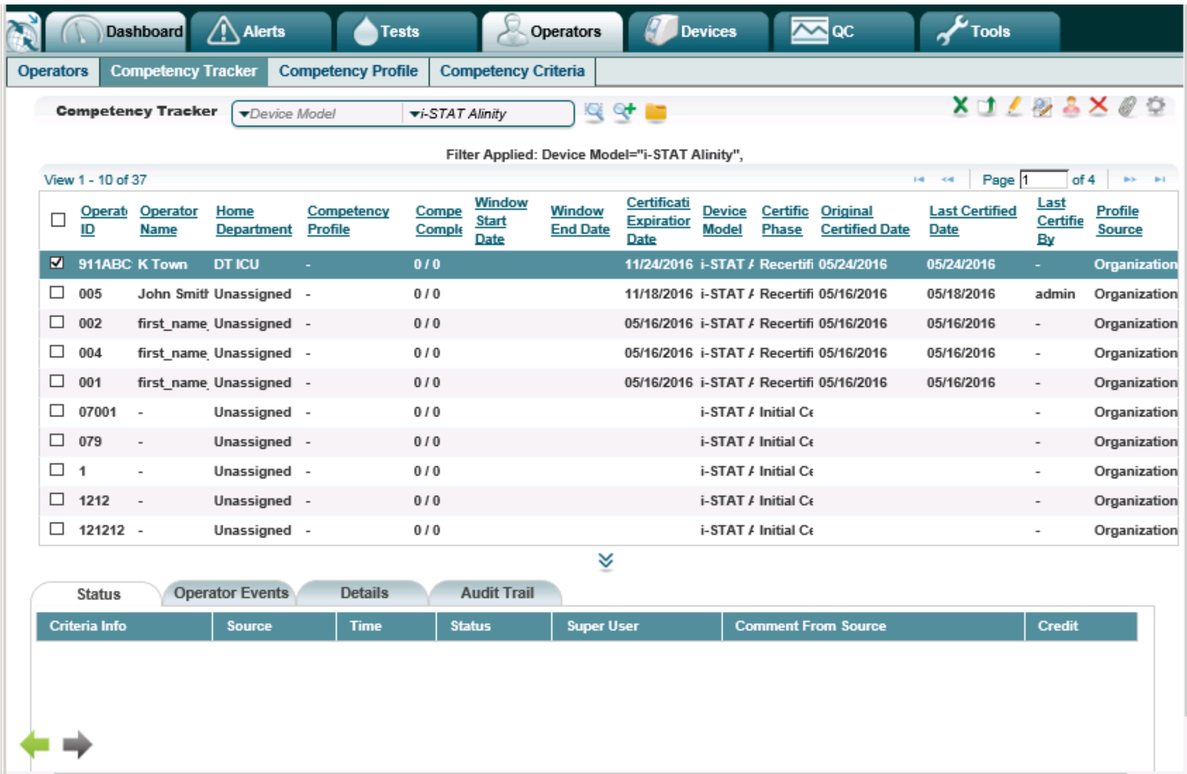


Table 5-2: Competency Tracker secondary tab: Details pane

Tab	Description
Status	Shows all of the criteria in the current profile and their status. The credit column displays “Yes” for the criteria that have been fulfilled within Criteria Credit Window, the status column displays passed or failed, and the time is the criteria event date and time. If no competency event for a criterion, all of the columns after the Criteria Info column are blank.
Operator Events	Shows all of the operator competency events for initial certification phase. For recertification phase, only show operator competency events since the last certified date. If an operator event matches a criterion in the competency profile, “Yes” is displayed in the Credit column indicating that the criterion has been fulfilled.

Tab	Description
Details	Shows more detailed information about the operator’s competency status.
Audit Trail	Shows the details of the selected operator’s competency tracking.

Competency Profile secondary tab

Competency profiles are named groups of competency criteria. Profiles are either initial certification profiles or recertification profiles. A competency profile is for a single device model, and it specifies the certification interval (month) and the certification method (manual or auto enabled).

The List pane of the Competency Profile secondary tab displays the following:

- Name
- Version
- Device Model
- Certification Phase
- Certification Interval
- Organization Default
- Certification Method

Figure 5-4: Operators tab: Competency Profile secondary tab

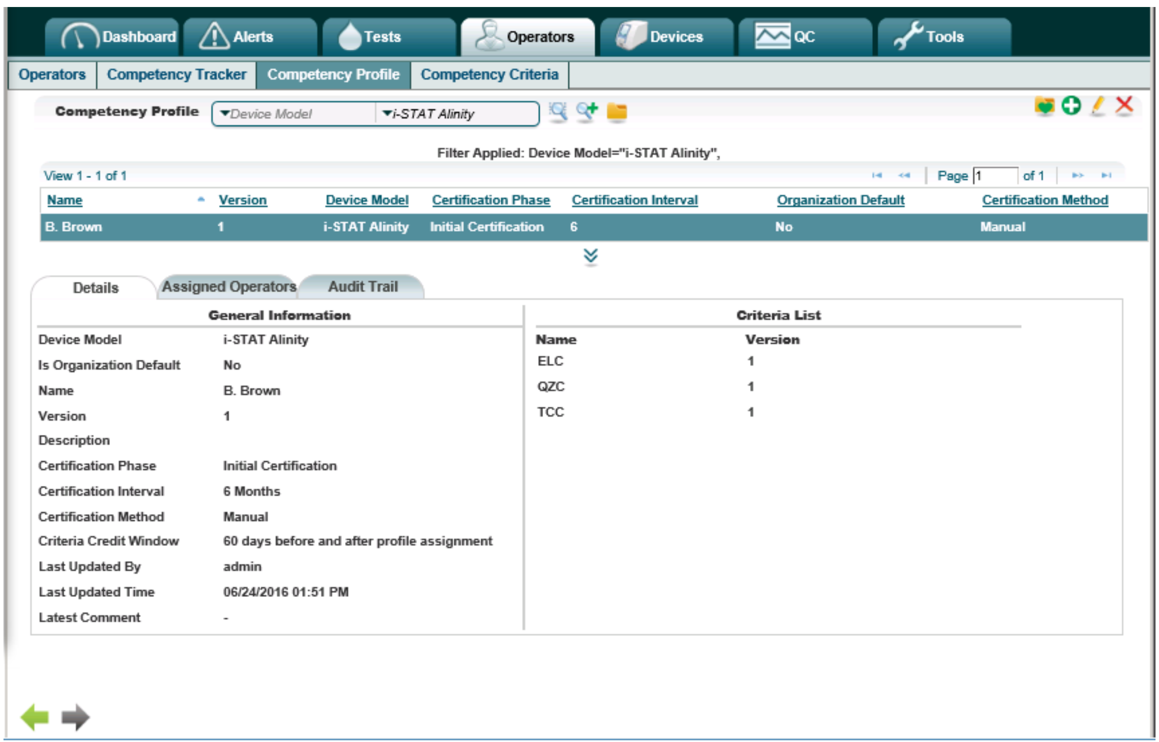


Table 5-3: Competency Profile secondary tab: Details pane

Tab	Description
Details	Shows detailed information about the competency profile in two sections: General Information and Criteria List. The General Information section displays basic information about the profile such as the device model, whether the profile is the default for the organization, and certification phase, interval, and method. The Criteria List displays the competency criteria that are assigned to the profile.
Assigned Operators	Shows the list of operators that the competency profile is assigned to.
Audit Trail	Shows additions and updates to the profile.

Competency Criteria secondary tab: Details pane

Competency criteria are the requirements that must be met for certification on a device model. Info HQ Manager supports creating, editing, and deleting criteria as needed. The criteria can be one of the following categories:

- Test Result Event
- External Data Event
- Manual Entry Event

Each of the categories has subcategories associated with them to further catalog the criterion.

The List pane of the Competency Criteria secondary tab displays the following information about competency criteria:

- Name
- Version
- Device Model
- Category
- Subcategory
- Updated By

Figure 5-5: Competency Criteria secondary tab

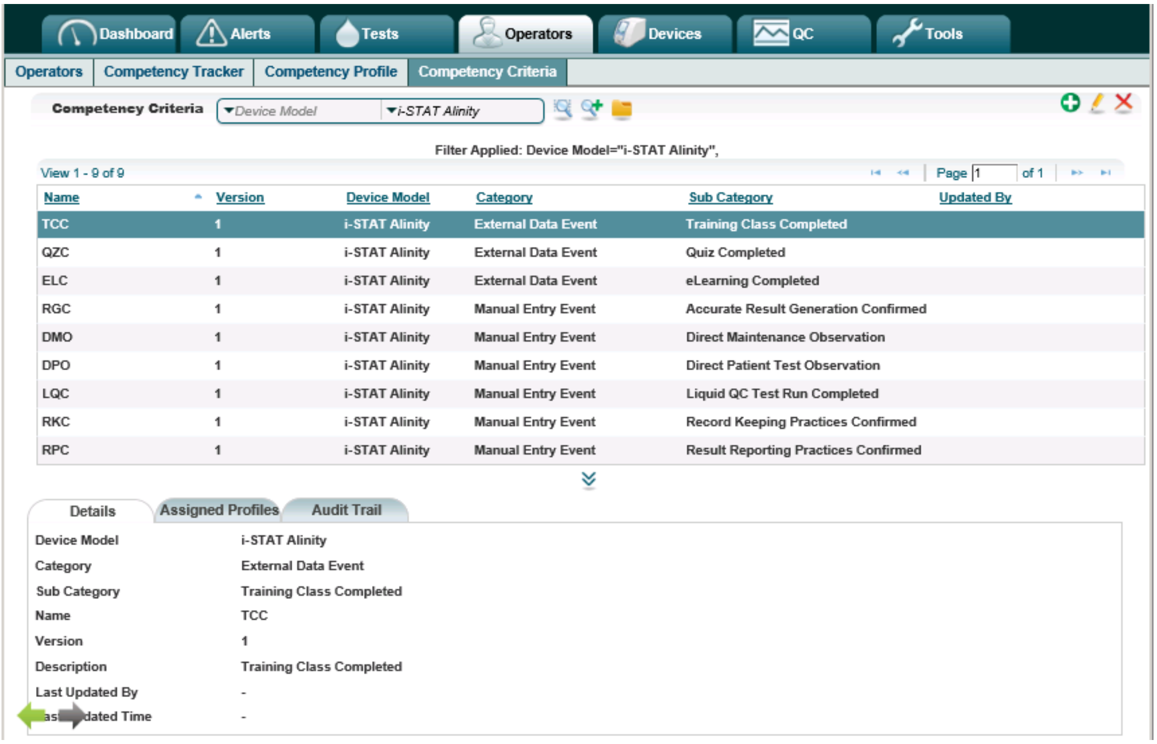


Table 5-4: Competency Criteria secondary tab: Details pane

Tab	Description
Details	Displays detailed information about the competency criterion including device model, categories, and information about the last update.
Assigned Profiles	Shows a list of profiles that the criterion is assigned to.
Audit Trail	Shows additions and updates to the criterion.

5.2 Add operators

Operators who perform tests and whose certifications Info HQ Manager must track need to be identified in the Info HQ Manager system.

There are two ways to add operators to Info HQ Manager: using the upload function to add multiple operators all at once from a Microsoft® Excel® template or individually (that is, one at a time). The following sections describe both methods

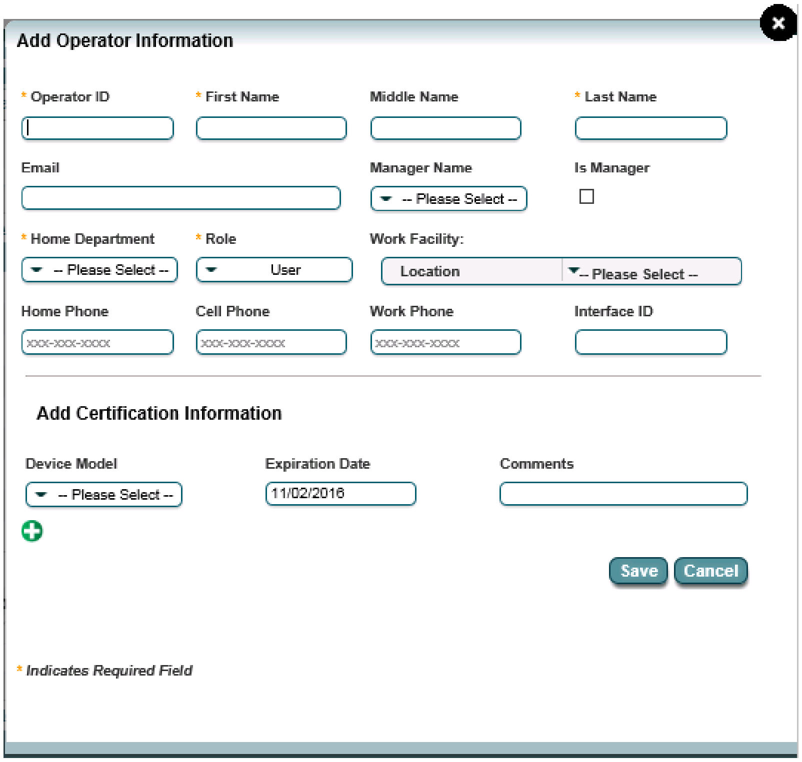
Add an individual operator

Follow these steps to add an individual operator.

1. Click the Operators tab.
2. Click .

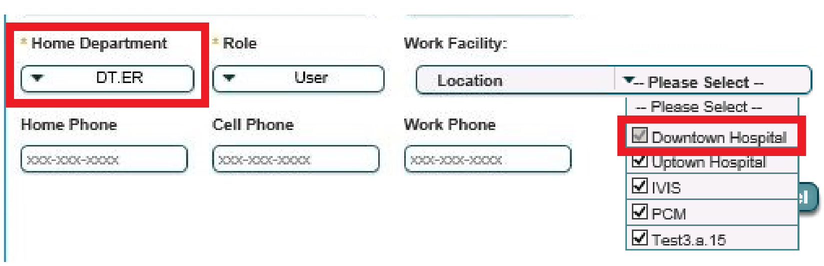
   The **Add Operator Information** dialog box opens, as shown.

Figure 5-6: Add Operator Information dialog box



3. If the operator is a manager, check the **Is Manager** box. Otherwise, select the operator's manager from the drop-down list.
4. Complete the remaining fields in the dialog box. Note the following:
   - The operator ID must be unique for each operator.
   - Operator names cannot include the ampersand (&) or tilde (~) character.
   - An operator's home department is the primary department within a facility out of which the operator works.
   - See the documentation for i-STAT Alinity for information about operator roles and how they are used by the device.
   - Select one or more work facilities for the operator. The operator’s primary work facility is the one where his or her home department is located. For example, in *Figure 5-7: Primary work facility*
   - The Home Department is DT.ER, which is located in the Downtown Hospital. The Work Facility drop-down list shows the Downtown Hospital’s check box is selected and greyed out, indicating that it is the operator’s primary work facility.

Figure 5-7: Primary work facility



Depending on your facility's preferred workflow, an operator can be certified for a device model at the same time they are added to the system, or they can be certified later.

To certify now, continue with step 5.

To certify later, click **Save** to add the new operator. When it is time to certify the operator, follow the steps in *Manage operator certification*.

5. Complete the **Add Certification Information** area of the dialog box as follows:
   a) Select a device model for operator certification from the drop-down list.
   b) If a second device certification is needed, click beneath the drop-down list to add another device model.
   c) Select a certification expiration date by clicking in the **Expiration Date** box and using the calendar widget, or leave the preselected date (six months from the present day).
   d) Optionally, enter a comment.
6. Click **Save**.

   The new operator is added to the system.

Upload operator certification data

Info HQ Manager includes a certification template, in spreadsheet format (.csv), for automating the granting of multiple certifications to operators within the system. The first few steps of this procedure provide instructions on how to download and prepare the template. Here is an example of the template populated with sample certification data for multiple operators.

Figure 5-8: Example certification template

FirstName	MiddleName	LastName	HomeDepartment	OperatorID	MgrOperatorID	Email	IsManager	WorkPhone	DeviceModel	InitialCertDateFormatted	StartDateFormatted	ExpirationDateFormatted	Active
Chris	R	Edison	GI-East	<100010>		cedison@gmail.com	TRUE	609-454-1581	i-STAT1	10/5/2010	10/5/2010	1/13/2015	TRUE
DIRK	G	HOLLAND	Ward107	<T040135>		DHOLLAND@ivis.domain	FALSE	040-135-5048	i-STAT1	5/26/2016	5/26/2016	11/26/2016	TRUE
DIRK	G	HOLLAND	Ward107	<T040135>		DHOLLAND@ivis.domain	FALSE	040-135-5048	i-STAT Alinity	5/26/2016	5/26/2016	11/26/2016	TRUE
SYDNEY	G	HOLLAND	Ward107	<T040135>		SHOLLAND@ivis.domain	FALSE	040-135-5048	i-STAT1	5/26/2016	5/26/2016	11/26/2016	TRUE
EDGARDO	H	CRAIG	CCU_ward1	<T735757>		ECRAIG@ivis.domain	FALSE	735-757-4216	i-STAT1	5/26/2016	5/26/2016	11/26/2016	TRUE
IGNACIO	H	CRAIG	ICU - East	<T735757>		ICRAIG@ivis.domain	FALSE	735-757-4216	i-STAT1	5/26/2016	5/26/2016	11/26/2016	TRUE
IGNACIO	M	BROCK	ICU - East	<T528156>		IBROCK@ivis.domain	FALSE	528-156-5622	i-STAT1	5/26/2016	5/26/2016	11/26/2016	TRUE
BLAINE	C	SIMMONS	CCU_ward1	<T256636>		BSIMMONS@ivis.domain	FALSE	256-636-4523	i-STAT1	5/26/2016	5/26/2016	11/26/2016	TRUE
BLAINE	M	SIMMONS	CCU_ward1	<T528156>		BSIMMONS@ivis.domain	FALSE	528-156-5622	i-STAT1	5/26/2016	5/26/2016	11/26/2016	TRUE
EDGARDO	R	CRAIG	IVIS-ER	<T116176>		ECRAIG@ivis.domain	FALSE	116-176-6215	i-STAT1	5/26/2016	5/26/2016	11/26/2016	TRUE
EDGARDO	R	CRAIG	IVIS-ER	<T116176>		ECRAIG@ivis.domain	FALSE	116-176-6215	i-STAT Alinity	5/26/2016	5/26/2016	11/26/2016	TRUE
GALE	F	OLIVER	fac36	<T420478>		GOLIVER@ivis.domain	FALSE	420-478-4374	i-STAT1	5/26/2016	5/26/2016	11/26/2016	TRUE
GALE	F	OLIVER	fac36	<T420478>		GOLIVER@ivis.domain	FALSE	420-478-4374	i-STAT Alinity	5/26/2016	5/26/2016	11/26/2016	TRUE
MARCO	R	SERRANO	IVIS	<T215001>		MSERRANO@ivis.domain	FALSE	215-001-3442	i-STAT1	5/26/2016	5/26/2016	11/26/2016	TRUE
MARCO	R	SERRANO	IVIS	<T215001>		MSERRANO@ivis.domain	FALSE	215-001-3442	i-STAT Alinity	5/26/2016	5/26/2016	11/26/2016	TRUE
MARCO	A	SERRANO	Unassigned	<T577420>		MSERRANO@ivis.domain	FALSE	577-420-5431	i-STAT Alinity	5/26/2016	5/26/2016	11/26/2016	TRUE
ABRAM	A	BROWN	ICU - West_ward1	<T422601>		ABROWN@ivis.domain	FALSE	422-601-2026	i-STAT Alinity	5/26/2016	5/26/2016	11/26/2016	TRUE
RUPERT	F	PICKETT	GI-East_ward1	<T362142>		RPICKETT@ivis.domain	FALSE	362-142-4508	i-STAT Alinity	5/26/2016	5/26/2016	11/26/2016	TRUE
ABRAM	X	PICKETT	Test3-ER	<T638302>		APICKETT@ivis.domain	FALSE	638-302-1511	i-STAT Alinity	5/26/2016	5/26/2016	11/26/2016	TRUE
GALE	K	STRICKLAND	Ward117	<T324824>		GSTRICKLAND@ivis.domain	FALSE	324-824-1668	i-STAT Alinity	5/26/2016	5/26/2016	11/26/2016	TRUE
CYRIL	A	LAWSON	Pediatrics	<T570743>		CLAWSON@ivis.domain	FALSE	570-743-3183	i-STAT Alinity	5/26/2016	5/26/2016	11/26/2016	TRUE
Bill		Johnson	Radiology	<10389979>	<100010>	jwhite@gmail.com	FALSE	609-454-1581	i-STAT1	10/11/2010	10/11/2010	1/13/2015	TRUE
Jay		Miao	Uptown_ER	<10530320>	<100010>	rblake@gmail.com	FALSE	609-454-1581	i-STAT1	9/6/2010	9/6/2010	1/13/2015	TRUE
Steve		Tang	GI-East	<105455>	<100010>	jtaylor@gmail.com	FALSE	609-454-1581	i-STAT1	9/14/2010	9/14/2010	1/13/2015	TRUE
Marisa		Lau	Radiology	<101>	<100010>	dspencer@gmail.com	FALSE	609-454-1581	i-STAT1	10/4/2010	10/4/2010	1/13/2014	TRUE
Ed		Moore	Radiology	<102>	<100010>	dspencer@gmail.com	FALSE	609-454-1581	i-STAT1	9/1/2010	9/1/2010	1/13/2012	TRUE
Tom		Buckely	Radiology	<103>	<100010>	dspencer@gmail.com	FALSE	609-454-1581	i-STAT1	9/1/2010	9/1/2010	1/13/2015	TRUE

Note: For operator certification data that is managed by the i-STAT Central Data Station (CDS) application, do not use the Info HQ Manager certification template. Instead, download the CDS_Operator_import.csv file from CDS and then upload it directly to Info HQ Manager, starting at step *9*. Do not modify the name of the file or its contents.

1. Click the Operators tab.
2. On the Operators primary tab, click to export the Operator Certification template file.
3. In the pop-up dialog box, click **Generate**.

   Note: Pop-ups must be enabled in the web browser.

4. In the Open dialog box, choose **Save File** and click **OK**.
   The template file is saved to the current computer's Downloads folder. The file has a .csv file extension.

Prepare the template file.

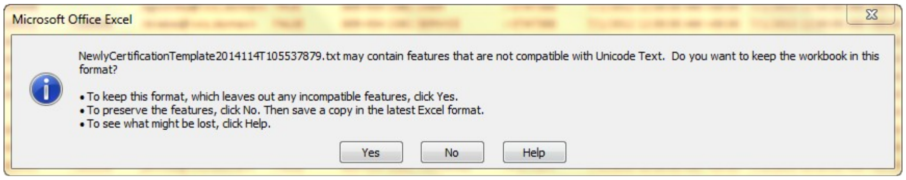
5. Locate and open the template file in Microsoft® Excel® or a similar spreadsheet program.
6. In the template, locate the first blank row below the column headings. If also revising existing certifications for operators, locate the desired operator and appropriate certification.
7. With assistance from the POCC or nursing staff and using *Figure 5-8: Example certification template* as a guide, enter the data for each new certification to grant to the operators, or revise the existing certifications as needed. When entering the information, note the following:

- Each certification (even for the same operator) must be on a separate row.
- Operator names cannot include the ampersand (&) or tilde (~) characters.
- The FirstName, MiddleName, and LastName columns identify the operator for whom the certification is to be granted.
- Information is required for the FirstName, LastName, and OperatorID columns. All other columns can be left blank, if desired.
- Initial certification, start, and expiration dates must be in the date format consistent with Info HQ Manager system.
- The name entered for the Device Model must be spelled as it is in Info HQ Manager.
- Home Department is the primary Department within a Facility out of which the operator works. The name entered for the Department must be spelled exactly as it is in Info HQ Manager, or Info HQ Manager will record the operator's home department as *Unassigned*.

8. Save the template file.

If presented with a dialog box similar to the one shown here, click **Yes**.

Figure 5-9: Microsoft® Excel® compatibility dialog



Upload the completed template file to Info HQ Manager, which uses the data in the template file to grant certification to the specified operators.

9. In the Info HQ Manager **Operators** screen, click to display the **Upload** dialog box.

10. Click **Browse**, navigate to the folder containing the certification template file, then click **Open** in the dialog box.

11. Click **Submit**.

12. Close the **Upload** dialog box.

Verify the results.

13. Click **Home** in the location breadcrumb or in the location tree to refresh the **Operators** screen.

Note that the operators whose certifications were newly granted or revised might be listed on the last page of listed operators. When uploaded from a Microsoft® Excel® spreadsheet, leading zeros may have been removed from operator IDs.

5.3 Change an operator's status

Should an operator be no longer employed by the healthcare organization, the operator's status should be set to an inactive state so that certification alerts will not be issued for the operator. (The operator cannot be deleted from the Info HQ Manager system because test data associated with the operator must be available for reviewing and reporting purposes.)

By default, when an operator is added to the Info HQ Manager system, the operator status is automatically set to *Active*.

Perform these steps to change an operator's status:

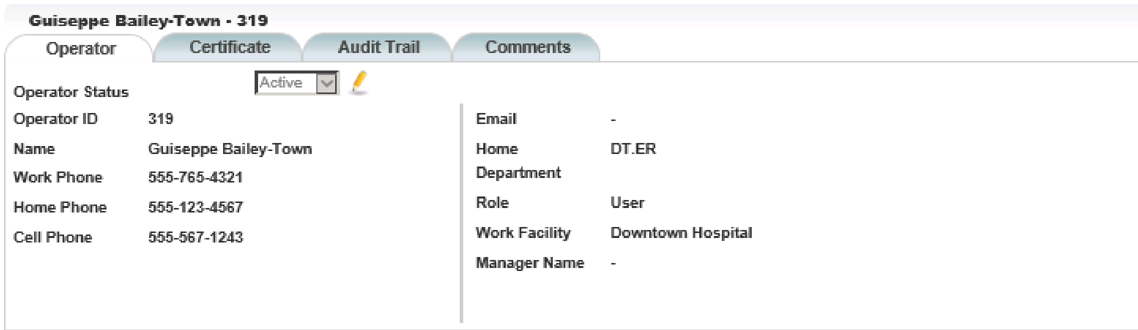
1. Click the Operators tab to display the **Operators** screen.

2. Locate and select the desired operator.

3. In the Details pane, click the Operator tab.

Details about the operator, including the operator status, are displayed, as shown.

Figure 5-10: Operators screen: Operator tab



4. Click .
   The **Operator Status** drop-down list becomes active.
5. Click the drop-down list, then select **Inactive**.
6. Enter a comment in the **Comment** field.

   A comment is required whenever an operator's active/inactive status is changed.
7. Click .
   Info HQ Manager updates the operator's status in the Details pane.
8. Optionally, click the Operators tab to refresh the screen and show the updated operator's status in the List pane.

   To restore the operator to active status, repeat these steps and select **Active** in the drop-down list.

Change status for a group of operators

To change the status for a group of operators, perform these steps:

1. Click the Operators tab to display the **Operators** screen.
2. Filter the operator list by using drop-down lists (see *Filter results using drop-down lists* for detailed information on filtering):
3. In the Operators list, select one or more operators by clicking the boxes in the left-hand column, or use the select all box (at the top of the column) to select all operators in the current view.
4. Click

   The Operator Status becomes inactive for all selected operators.

Assign or change work facilities for operators

Assigning a work facility to an operator or group of operators ensures that their certifications are sent only to the work facilities that they are assigned to. This feature replaces the Support Global Operator List parameter in the Info HQ Configuration, which when set to Yes, allows operator certifications in the Healthcare System to be sent to all of the facilities in the same Healthcare System.

Note: If Support Global Operator List is set to Yes, then after the system is upgraded to a version of Info HQ Manager later than 1.6, operators must be assigned to their respective work facilities.

Work facilities can be assigned or changed for individual operators or groups of operators. This procedure describes how to assign or change work facilities for both groups and individual operators using on the Operators screen.

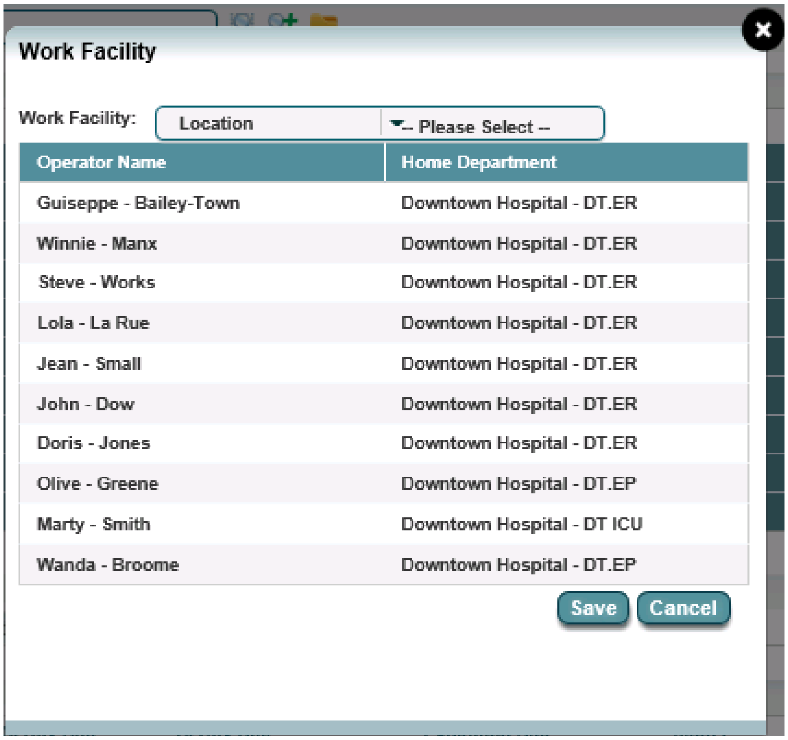
Note: Individual operator work facility assignments can also be changed by editing the operator information. See *Edit operator profile information* for instructions.

Follow these steps to assign or change work facilities for operators.

1. Click the Operators tab.
2. Select one or more operators that you want to assign or change work facilities for.

3. Click .
The Work Facility dialog box opens.

Figure 5-11: Work Facility dialog box



4. In the Work Facility drop-down list, select one or more facilities to assign or change for the selected operators.

5. Click Save. The screen refreshes automatically.

The work facilities are assigned or changed for the selected operators. When work facilities are changed for operators, the old assignment is overwritten except for the primary facility.

5.4 View operator profile information

Follow these steps to view an operator's profile and certification information:

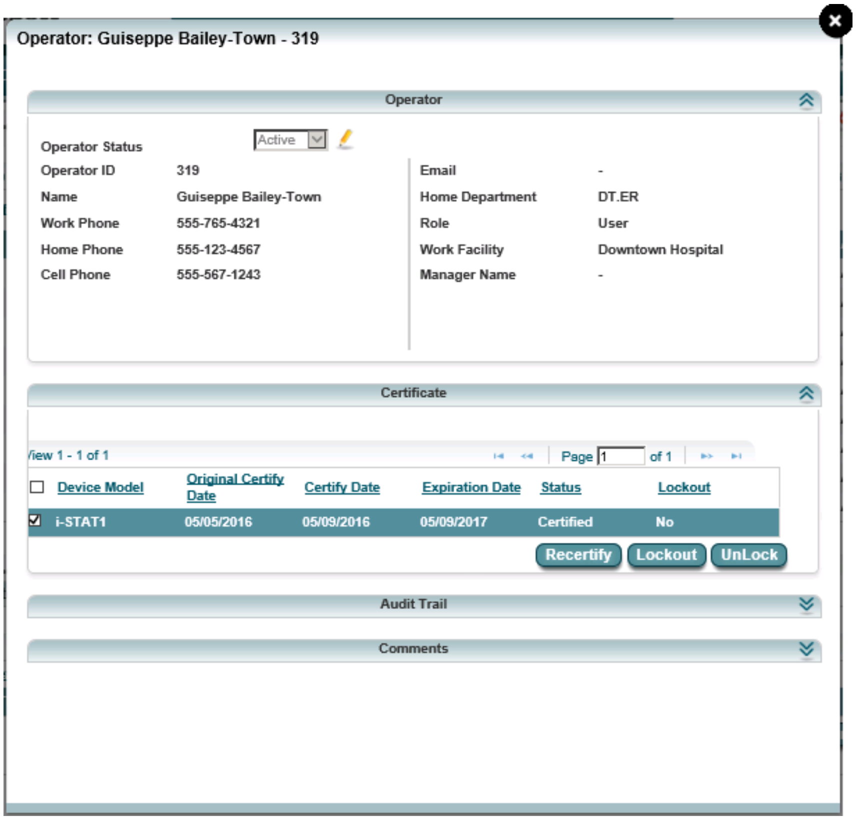
1. Click the Operators tab to display the **Operators** screen.

2. Locate and select the desired operator.

3. Double-click the operator to display the operator details and certification status box, as shown.

The Operator section lists the operator's profile information. The Certification section lists the devices for which the operator holds a certification and status information for each certification.

Figure 5-12: Operator profile and certification details



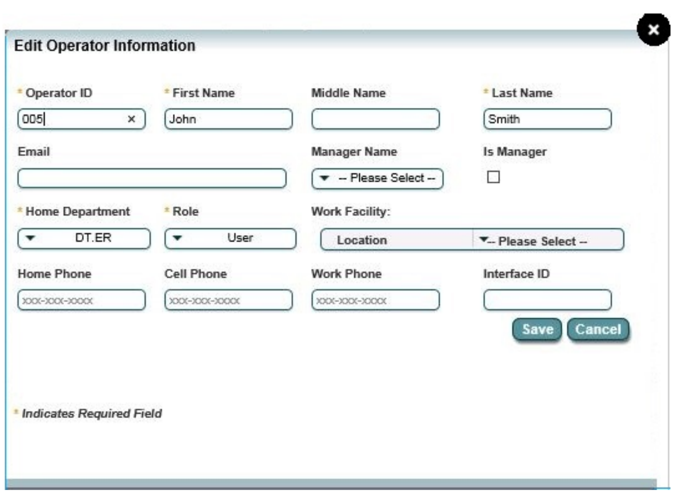
5.5 Edit operator profile information

Occasionally an operator's profile information needs to be updated, for example an operator's phone number changes or the operator moves to another department. Perform these steps to edit an operator's profile information:

1. Click the Operators tab to display the **Operators** screen.
2. Locate and select the desired operator.
3. Click  in the top-right corner of the screen.

   The **Edit Operator Information** dialog box opens.

Figure 5-13: Edit Operator Information dialog box



4. Update the fields as needed, then click **Save**.

5.6 Operator competencies and certifications

Info HQ Manager provides the ability to manage operator certifications separate from competencies. Certification management is supported for all devices, while Operator Competency Management (OCM) is supported for only i-STAT Alinity. Competencies are the requirements that operators must meet to be certified on a device. Competencies are grouped into profiles along with other data, and can then be used for tracking and management purposes.

OCM can be enabled or disabled in the Info HQ Configuration, Advanced settings, and does not impact the ability to manage operator certification. Operator competencies and certifications can be managed through the following OCM features: competency criteria, competency profiles, and competency.

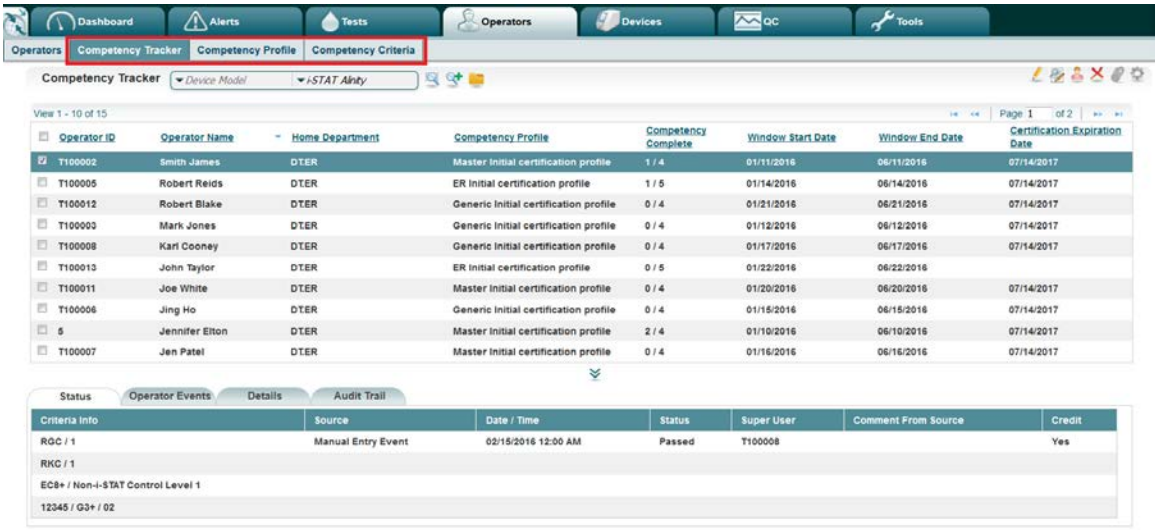
- To manage operator certifications alone, see *Manage operator certification*.
- To manage operator competencies and certifications for i-STAT Alinity via OCM features, see *Manage operator competencies — i-STAT Alinity*.

Figure 5-14: Operator competency flow

5.7 Manage operator competencies — i-STAT Alinity

Info HQ Manager displays the operator competency interface on secondary tabs on the Operators primary tab when the Operator Competency Management (OCM) feature is enabled.

Figure 5-15: Operator Competency Management (OCM) secondary tabs



Enable Operator Competency Management (OCM) for i-STAT Alinity

OCM features are enabled by default. See the *Implementation Guide* for detailed information about the OCM Enabled setting on the Tools primary tab and Info HQ Configuration secondary tab.

Create and assign OCM criteria and profiles

Before you use the OCM feature, it is recommended that you create some competency criteria and competency profiles in Info HQ Manager.

To create and assign OCM criteria and profiles in Info HQ Manager, complete the following steps:

1. *Create competency criteria.* The criteria are the basic building blocks for competency profiles that are used to track device competencies for operators.
2. *Create competency profiles*. Competency profiles are collections of competency criteria that are assigned to a specific device model. Profiles can be assigned to operators in order to track their competencies and certifications.
3. Assign competency profiles as defaults at the organization-level or department-level. See *Assign organization-level default profiles* and *Assign department-level default profiles* for instructions.

Create competency criteria

Competency criteria are the requirements that must be met for an operator to demonstrate the required competency for certification on a device model. Info HQ Manager comes prepopulated with the criteria shown in the following table.

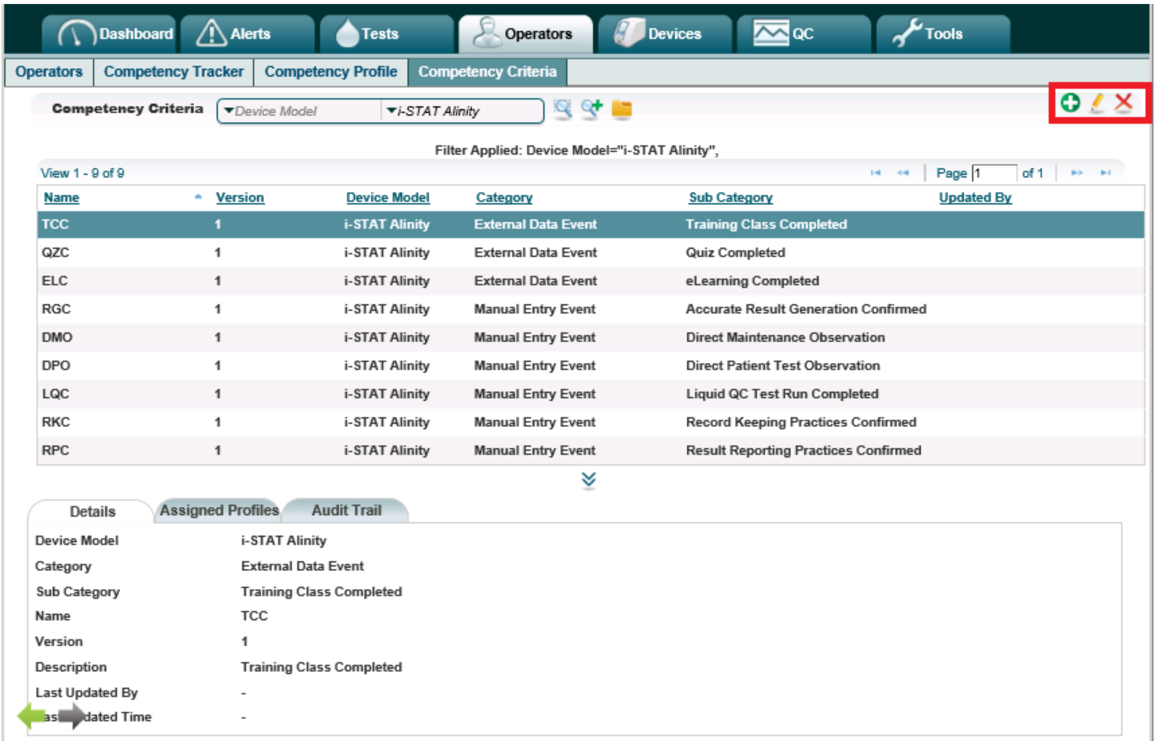
Table 5-5: Pre-populated competency criteria

Name	Default version	Category	Subcategory
TCC	1	External Data Event	Training Class Completed
QZC	1	External Data Event	Quiz Completed
ELC	1	External Data Event	eLearning Completed
RGC	1	Manual Entry Event	Accurate Result Generation Confirmed
DMO	1	Manual Entry Event	Direct Maintenance Observation
DPO	1	Manual Entry Event	Direct Patient Test Observation
LQC	1	Manual Entry Event	Liquid QC Test Run Competed
RKC	1	Manual Entry Event	Record keeping Practices Confirmed
RPC	1	Manual Entry Event	Result Reporting Practices Confirmed

To create competency criteria, complete the following steps:

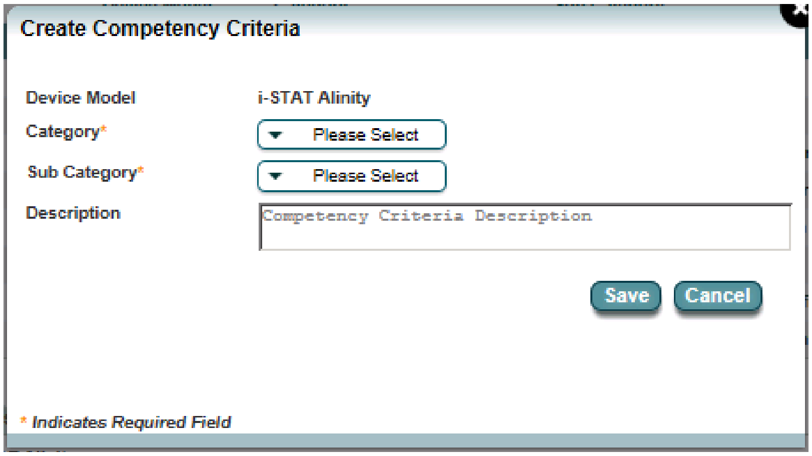
1. Click the Operators primary tab.
2. Click the Competency Criteria secondary tab. The tab is displayed with the tab-specific tools in the upper right corner of the tab.

Figure 5-16: Competency Criteria secondary tab



3. In the toolbar, click . The Create Competency Criteria dialog box opens.

Figure 5-17: Create Competency Criteria dialog box



4. Select the category and subcategory for the competency criterion. Additional fields are displayed based on your selections.

Table 5-6: Competency criteria categories, sub-categories, and fields

Selected category	Available sub-categories	Sub-category fields displayed
Test Result Event	QC Test	Cartridge Type Fluid Selection
	Training Mode Test	Patient ID Cartridge Type Required Instrument Comment
External Data Event	• Training Class Completed • Quiz Completed • eLearning Completed	Name Version
Manual Entry Event	• Accurate Result Generation Confirmed • Direct Maintenance Observation • Direct Patient Test Observation • Quiz Completed • Record Keeping Practices Confirmed • Result Reporting Practices Confirmed • Training Class Completed • eLearning Completed	Name Version
	• Liquid QC Test Run Completed • Training Mode Test Run Completed	Name

5. Complete the additional fields.
6. Optionally, type a description of the competency criterion.
7. Click Save to save the criterion.
8. Repeat this procedure as needed to create all of the necessary competency criteria.

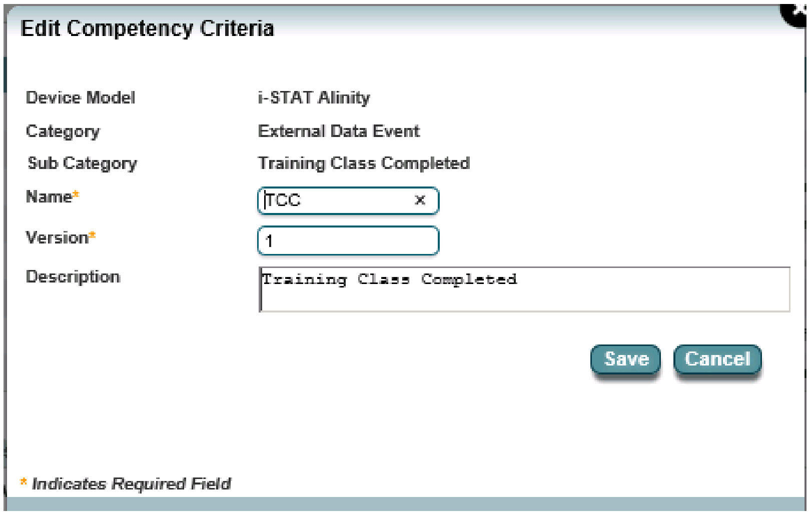
Edit competency criteria

If necessary, competency criteria can be added.

To edit competency criteria, complete the following steps:

1. Click the Operators primary tab.
2. Click the Competency Criteria secondary tab.
3. Click . The Edit Competency Criteria window opens.

Figure 5-18: Edit Competency Criteria



Note: If the name of the criteria is changed, the old criteria name and status is retained in the Audit Trail, and the criteria name is updated in the competency profile. However, even if the criterion was completed under its previous name, it appears as incomplete in the profile under its new name.

Note: Version must be updated manually.

4. Edit the fields as needed.

5. Click Save.

Delete competency criteria

A competency criterion can be deleted if it is not assigned to any competency profiles.

To delete a competency criterion, complete the following steps:

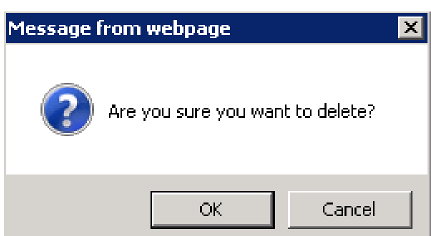
1. Click the Operators primary tab.

2. Click the Competency Criteria secondary tab.

3. Select the criterion that you want to delete.

4. Click . The following confirmation message is displayed.

Figure 5-19: Are you sure you want to delete? dialog



5. Click OK. The competency criterion is deleted.

Create competency profiles

A profile applies to only one device model and includes the certification interval (month) and certification method (auto enabled or manual).

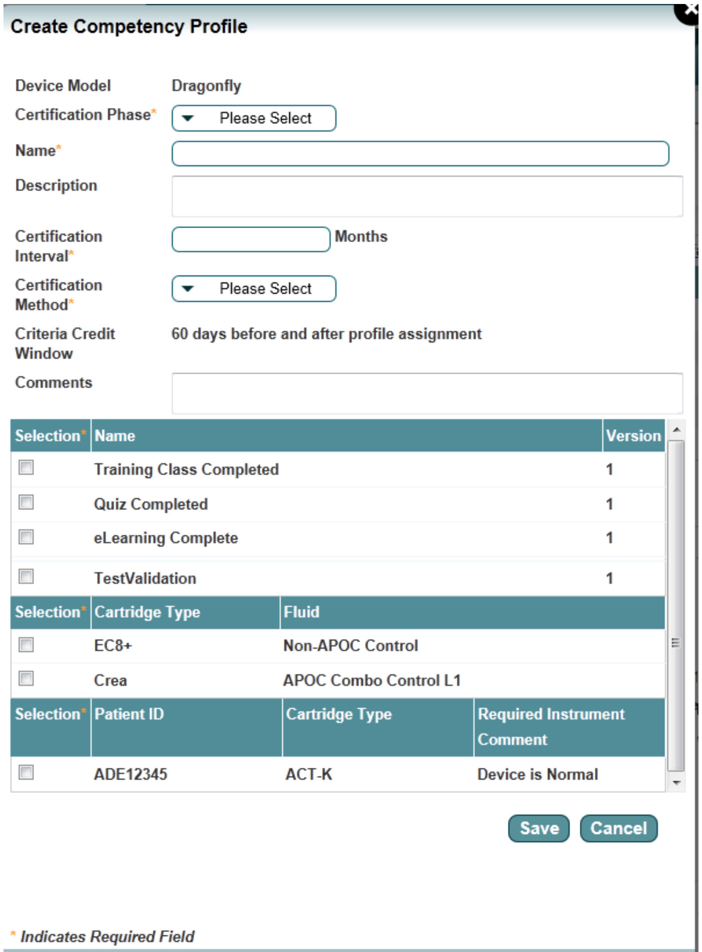
If default initial and recertification profiles exist, new operators are automatically following one of them. New operators that do not have a device certification for i-STAT Alinity associated with them are automatically following the default profile for initial certification. New operators with an i-STAT Alinity certification are automatically following the default profile for recertification.

If neither the default organization-level nor department-level competency profiles exist, then no profile is assigned to the operator.

To create a competency profile, complete the following steps:

1. Click the Operators primary tab.
2. Click the Competency Profiles secondary tab.
3. In the toolbar, click . The Create Competency Profile dialog box opens.

Figure 5-20: Create Competency Profile dialog



4. Complete the fields, and select the competency criteria that you want to include in the profile. Criteria are organized into three categories within the selection area of the window: Common Criteria with the Name and Version attributes; QC Test Criteria with the Cartridge Type and Fluid attributes; and Training Mode Test Criteria with the Patient ID, Cartridge Type, and Required Instrument Comment attributes.

Ensure that the following requirements are met as you complete the dialog box:

- The profile name must be unique and must be 80 characters or fewer.
- The profile description is optional and can be a maximum of 130 characters.
- The certification interval must be an integer from 1 to 1000.
- The comments field can contain a maximum of 130 characters.
- At least one criterion must be selected.

5. Click Save.

Edit competency profiles

Attributes of a competency profile, such as the criteria they contain, can be changed after the profile is created.

To edit a competency profile, complete the following steps:

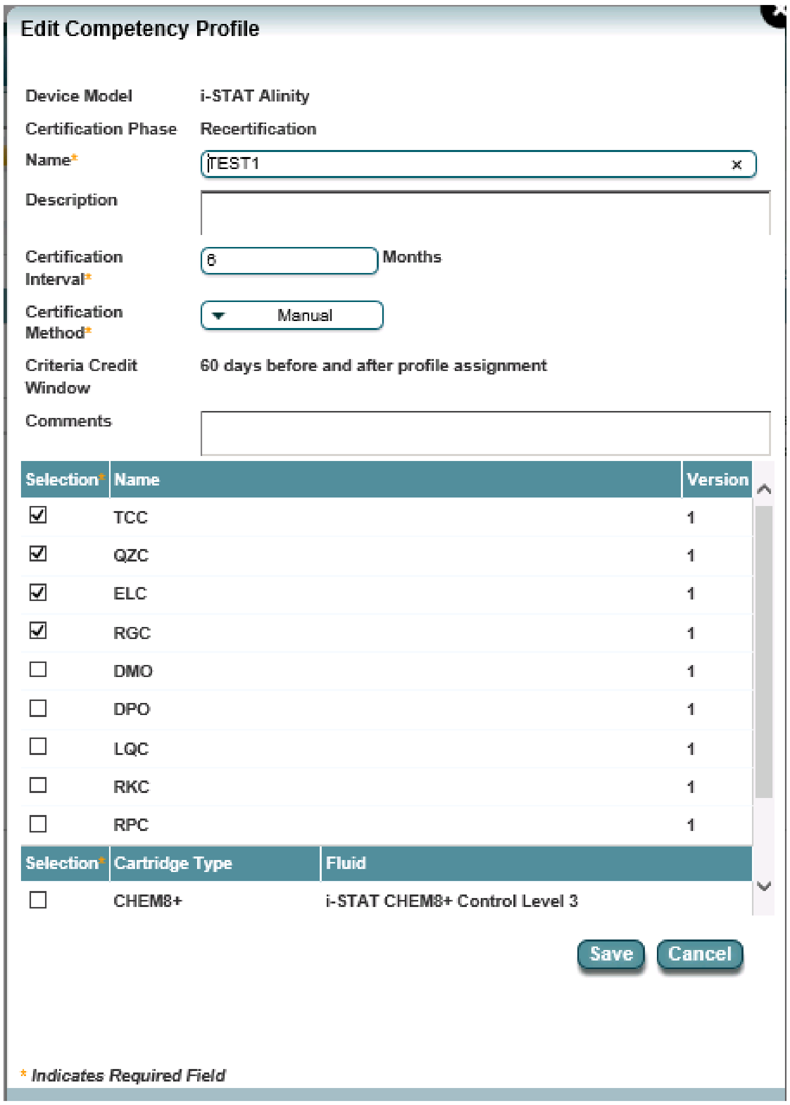
1. Click the Operators primary tab.

2. Click the Competency Profile secondary tab.

3. Select the profile that you want to edit.

4. In the toolbar, click . The Edit Competency Profile dialog box opens.

Figure 5-21: Edit Competency Profile dialog



5. Edit the profile attributes as needed.
Note: The Certification Phase is read-only.

6. Click 

.

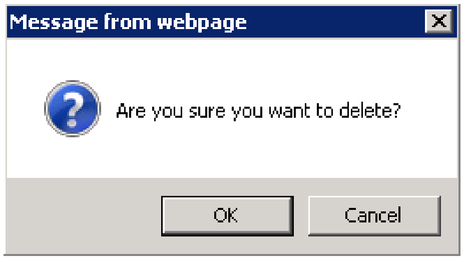
Delete competency profiles

Competency profiles that are not assigned to any operator or department and, are not the organization default profile can be deleted.

To delete a competency profile, complete the following steps:

1. Click the Operators primary tab.
2. Click the Competency Profile secondary tab.
3. Select the profile that you want to delete.
4. In the toolbar, click  to delete the profile. The following confirmation message is displayed:

Figure 5-22: Delete competency profile confirmation dialog



5. Click OK to delete the profile.

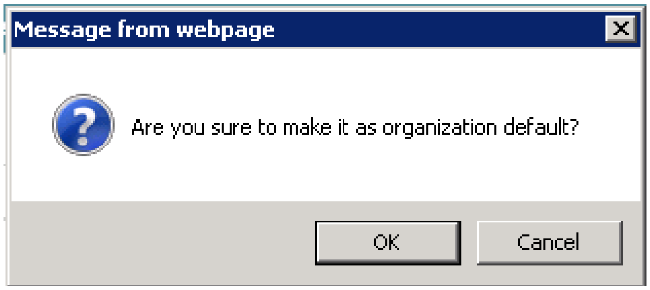
Assign organization-level default profiles

Info HQ Manager supports at most two organization default profiles, one for initial certification phase and the other for recertification phase. If a profile is designated as the organization default, the old default profile is replaced, and the operators who were following the old one are automatically following the new default one.

To assign an organization-level default competency profile, complete the following steps:

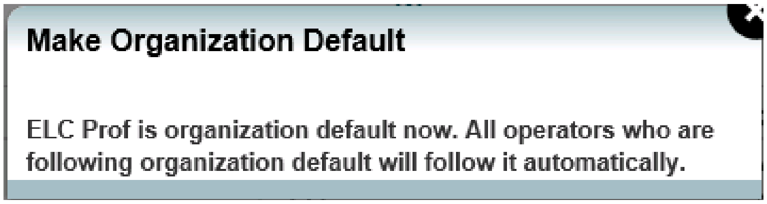
1. Click the Operators primary tab
2. Click the Competency Profiles secondary tab.
3. Select the profile that you want to make the organization default.
4. In the toolbar, click . The following dialog box is displayed.

Figure 5-23: Make default competency profile confirmation dialog



5. Click OK. The following message is displayed.

Figure 5-24: New default profile message



6. Close the message box. The profile is now the organization default profile, and all operators who were following the previous one are following the new one.

Assign a competency profile to operators

If no organization-level or department-level default profiles exist, or if an operator needs to follow a profile other than the defaults, it is necessary to manually assign a profile to the operator.

To assign a competency profile to one or more operators, complete the following steps:

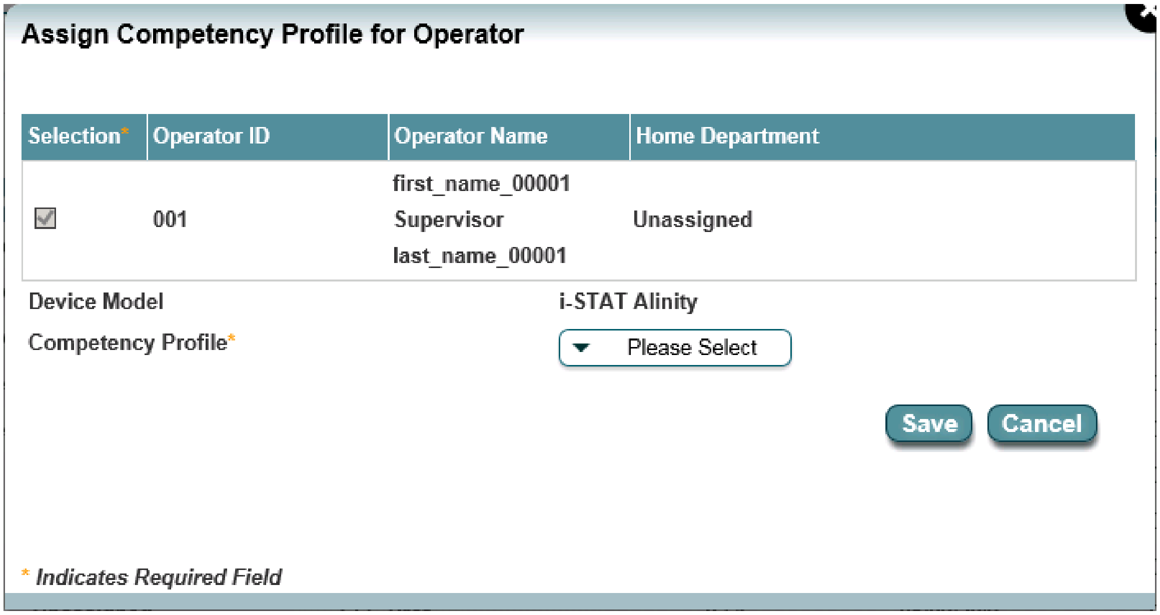
1. Click the Operators primary tab.

2. Click the Competency Tracker secondary tab.

3. Select the operators that you want to assign profiles to.

4. In the toolbar, click . The Assign Competency Profile for Operator dialog box opens.

Figure 5-25: Assign Competency Profile for Operator dialog box



In the **Competency Profile** drop-down list, select the profile to assign to the operators.

Note: Choose **Competency Profile** option of **Department Default** in order to make selected operator or operators follow department-level default profiles.

5. Click .

Assign department-level default profiles

When operators are assigned to a department, the initial or recertification department default competency profile is automatically assigned to them depending on their certification phase. When operators complete the initial certification phase, the department default recertification profile is automatically assigned to them.

To assign a department-level default competency profile, complete the following steps:

1. Click Home in the Location breadcrumb at the top of the Info HQ Manager screen.

2. In the drop-down list, click on the desired facility. The Location breadcrumb updates to include the selected facility.

3. In the Location breadcrumb, click the facility.

4. Hover over the department and click . The Edit Department dialog box opens.

Figure 5-26: Edit Department dialog with OCM enabled

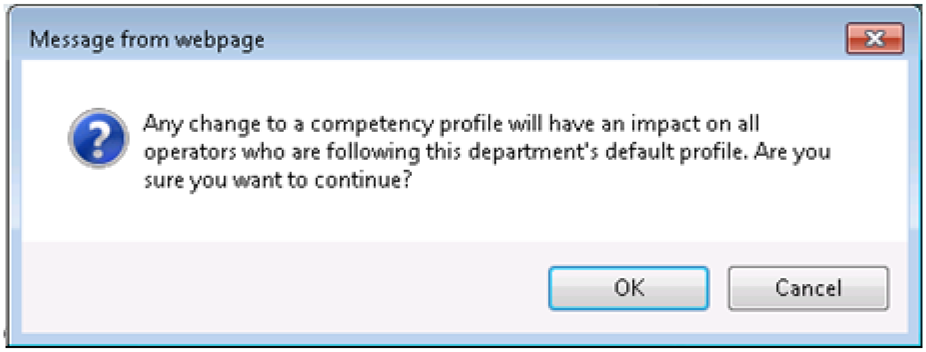
5. Optional. Under Competency Profile for i-STAT Alinity, select the default competency profiles for the department.

   Note: If they exist, the default initial and recertification competency profiles for the organization are selected by default. Also, the Initial Certification and Recertification drop-down lists are available when OCM is enabled.

6. Click Save.

7. If either competency profile selection is changed in the previous step, and you click Save, the following message is displayed. Click OK to proceed.

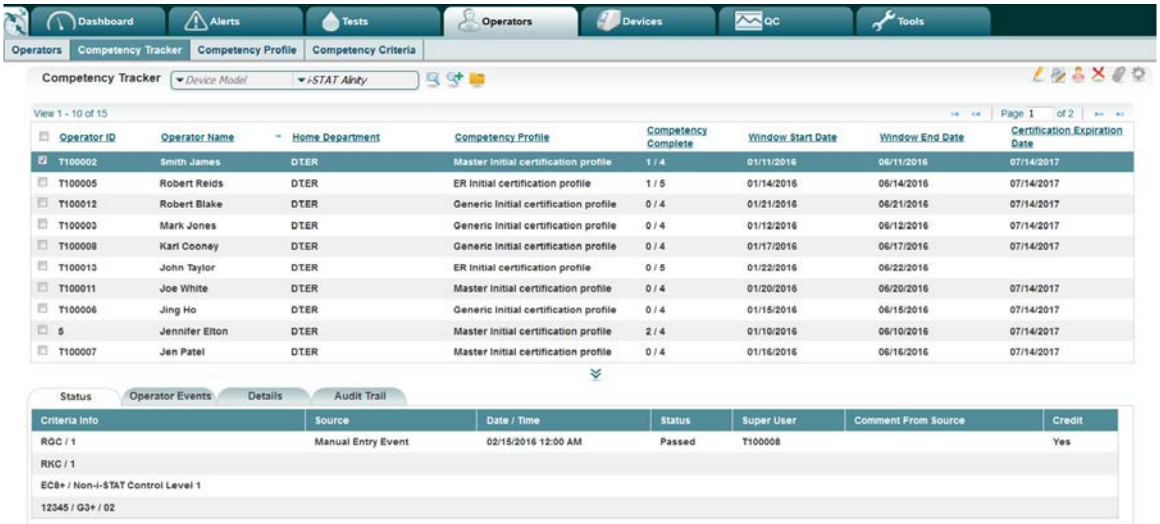
Figure 5-27: Accept change to department-level profile



Competency Tracker

Information about operators' current competency status is displayed in the Competency Tracker. Other tasks such as assigning competency profile to an operator or removing a competency profile from an operator can also be done on this tab.

Figure 5-28: Competency Tracker secondary tab



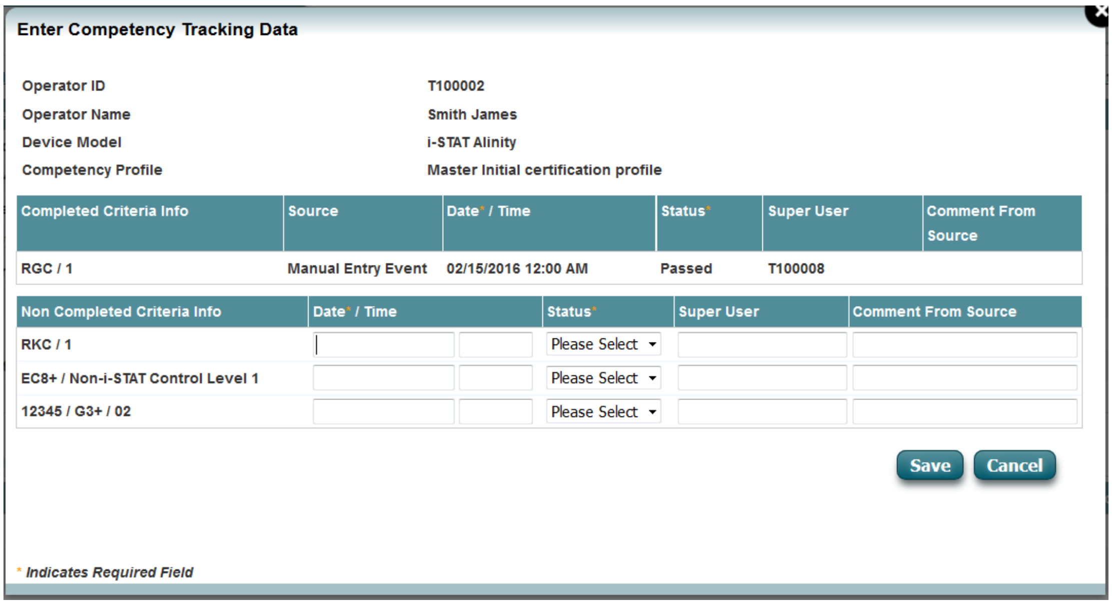
Enter competency tracking data for an individual operator

Competency data can be entered for an individual operator using the Enter Competency Tracking Data action on the Competency Tracking secondary tab.

To add competency data for an individual operator, complete the following steps:

1. Click the Operators primary tab.
2. Click the Competency Tracker secondary tab.
3. Select the operator that you want to add competency data for.
4. In the toolbar, click . The Enter Competency Tracking Data dialog is displayed.

Figure 5-29: Enter Competency Tracking Data dialog



5. In the **Date* / Time** column, click on the first field, and select the date that the criterion was completed from the pop-up calendar widget. Optionally, click on the second field and select the time that the criterion was completed.
6. In the **Status** column, select Passed or Failed from the drop-down list as appropriate.
7. Optional. In the **Super User** column, enter the identifying information for the supervisor or trainer. Maximum length, 30 characters.
8. Optional. In the **Comments** field, enter any notes or comments regarding the competency data entered. Maximum length, 130 characters.
9. Click 

.

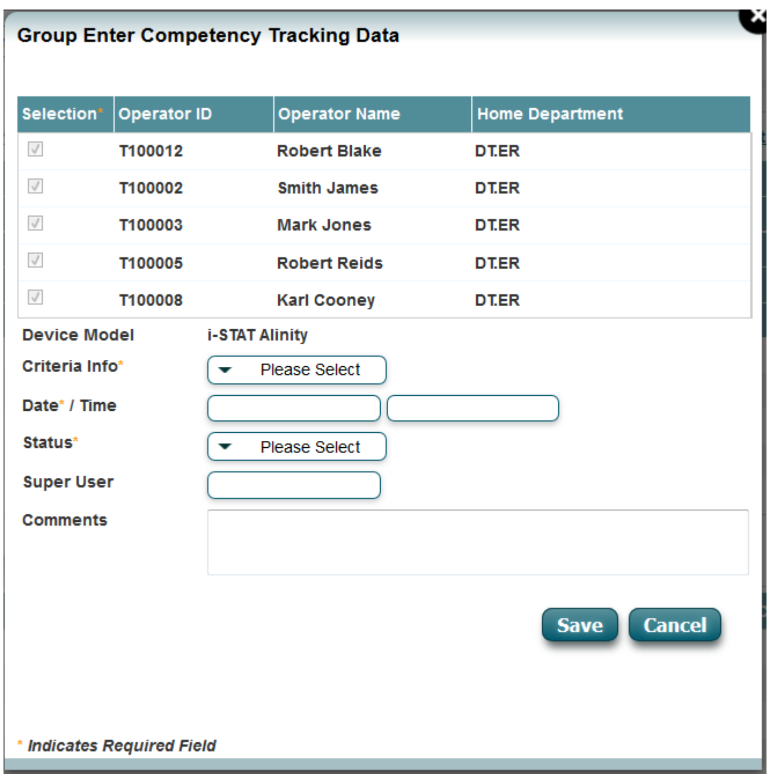
Enter competency tracking data for a group of operators

Competency data can be entered for a group of operators using the Group Enter Competency Tracking Data action on the Competency Tracking secondary tab.

To add competency data, complete the following steps:

1. Click the Operators primary tab.
2. Click the Competency Tracker secondary tab.
3. Select the operators that you want to add competency data to.
4. In the toolbar, click . The Group Enter Competency Tracking Data dialog box opens.

Figure 5-30: Group Enter Competency Tracking Data dialog



5. In the **Criteria Info** drop-down list, select the criterion that you want to record the operator status for.
6. The **Date* / Time** fields display widgets for the date and time when they are clicked on. Then click the first field and select the date that the criterion was completed from the calendar widget. Optionally, click on the second field and select the time that the criterion was completed.
7. In the **Status** drop-down list, select Passed or Failed as appropriate.
8. Optional. In the **Super User** field, enter the identifying information for the supervisor or trainer. Maximum length, 30 characters.

9. Optional. In the **Comments** field, enter any notes or comments regarding the competency data entered. Maximum length, 130 characters.
10. Click Save.

5.8 Manage operator certification with OCM

You can manage operators' certification for i-STAT Alinity on the Competency Tracker secondary tab. It can also be done separately, see *Manage operator certification*.

The following sections describe how to grant and manage each operator's certification for i-STAT Alinity using the OCM feature.

Grant operator certifications for i-STAT Alinity with OCM

Operators can be certified individually or in groups. The following sections describe how to certify and recertify operators, and how to extend an existing certification for i-STAT Alinity, using OCM.

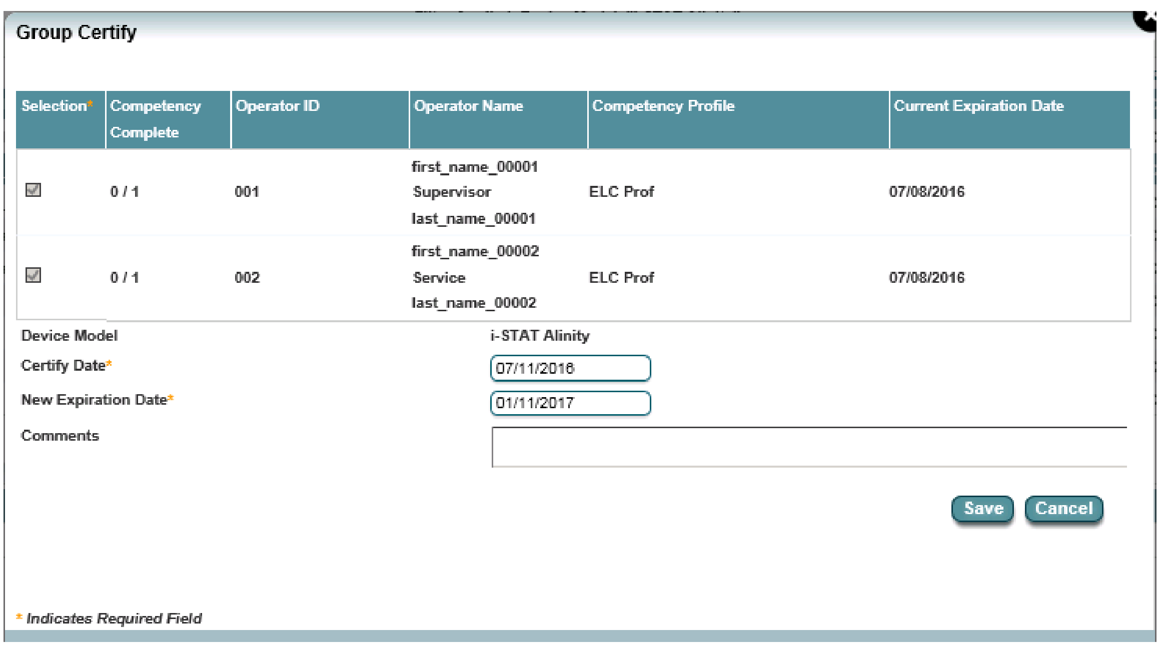
Certify or recertify one or more operators for i-STAT Alinity using OCM

Operators can be certified or recertified individually or in a group at any competency status. For group certifications, all of the operators must be following the same certification profile.

To certify or recertify one or more operators for i-STAT Alinity using OCM, complete the following steps:

1. Click the Operators primary tab
2. Click the Competency Tracker secondary tab.
3. Select one or more operators to certify for i-STAT Alinity.
4. In the toolbar, click . The Group Certify dialog opens.

Figure 5-31: OCM Group Certify dialog



5. If needed, adjust the Certify Date and New Expiration Date.
6. Optional. Enter comments regarding the certification. Maximum 130 characters.
7. Click Save. The following actions are completed:

- If this is the initial certification for operators, their certification is generated with the Certify Date and New Expiration Date entered in the Group Certify dialog box.
- If this is a recertification for operators, their certification is updated with the Certify Date and New Expiration Date entered in the Group Certify dialog box.
- An entry is added to the audit trail for the certification action.

5.9 Manage operator certification

Operator certifications can be managed for i-STAT Alinity devices using the Operator Competency Management (OCM) feature if it is enabled. Certifications can also be managed without OCM for both i-STAT 1 and i-STAT Alinity device certifications.

The following sections describe how to grant and manage each operator's certification for i-STAT 1 and i-STAT Alinity devices outside of OCM.

Grant operator certifications

Operators can be certified individually or in groups. The following sections describe how to certify and recertify operators, and how to extend an existing certification.

Certify an individual operator

When an operator successfully completes all required competencies for a device model, an authorized user can certify the operator on the device model.

Follow these steps to certify an operator:

1. Click the Operators tab to display the **Operators** secondary tab.
2. Locate and select the desired operator.
3. Click .
   The **Group Certify** dialog box displays the certification information for the selected operator.
4. By default, **Certify Date** (when the certification becomes effective) is set to today and **Expiration Date** field is preset to expire the certification 6 months from today. If necessary, click the **Expiration Date** box and use the calendar widget to select a different expiration date.
5. In the **Comment** field, enter a comment related to this certification action.
6. In the lower portion of the dialog box, check the device models for which to recertify the operator.
7. Click Save.
8. Click OK in the confirmation box.
   Info HQ Manager certifies the operator for the selected device models.

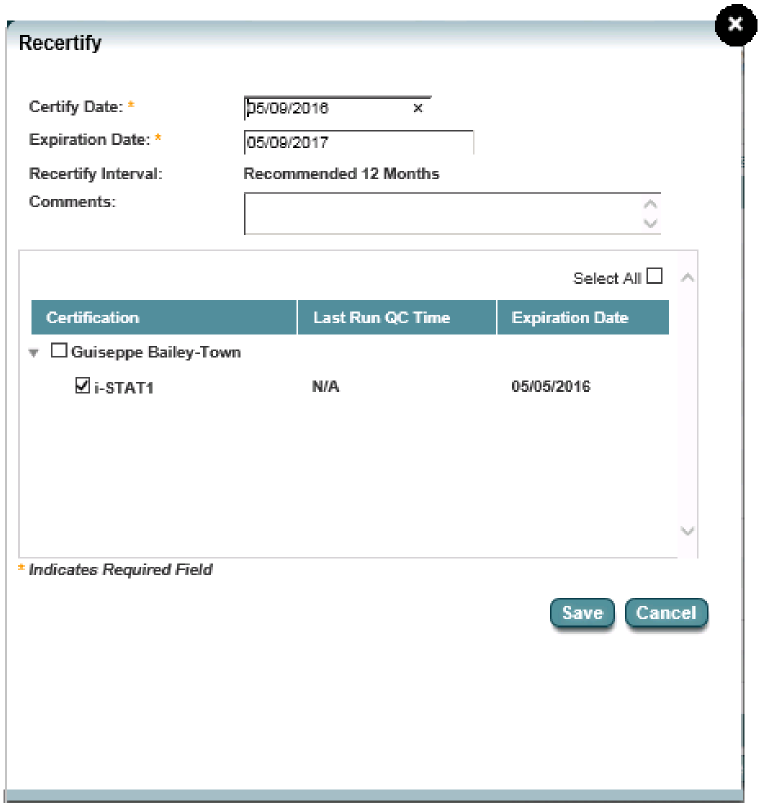
Recertify an individual operator

Follow these steps to recertify an operator:

1. Click the Operators tab. The **Operators** secondary tab is displayed by default.
2. From the list of operators, select the operator whose certification is to be recertified. In the Details area, the **Certificate** tab is displayed automatically.
3. On the **Certificate** tab, select the device or devices for which the operator is to be recertified.
4. Click 

.

Figure 5-32: Recertify dialog box



5. By default, **Certify Date** (when the recertification becomes effective) is set to today and **Expiration Date** field is preset to expire the certification 12 months from today. If necessary, click the **Expiration Date** box and use the calendar widget to select a different expiration date.
6. In the **Comment** field, enter a comment related to this recertification action.
7. In the lower portion of the dialog box, check the device models on which to recertify the operator. Checking an operator's name will automatically check all device models.
8. Click **Save**.
9. Click **OK** in the confirmation box.
   Info HQ Manager recertifies the operator for the selected device models.

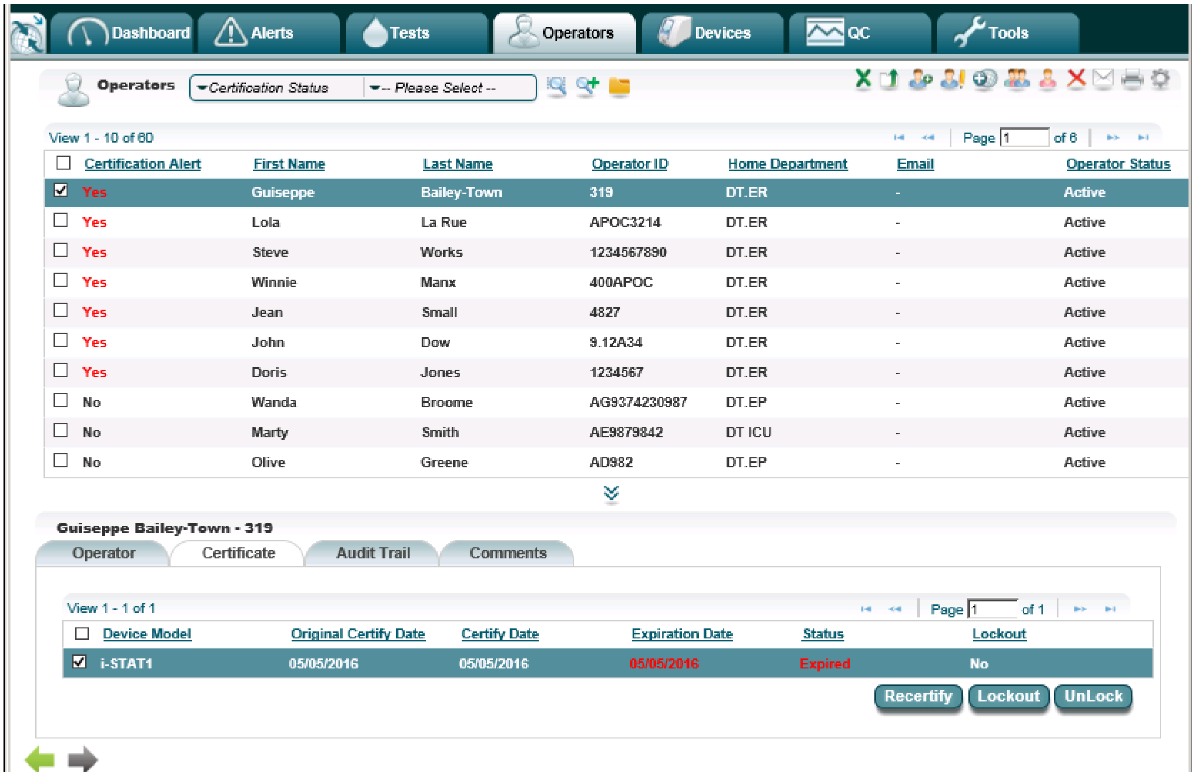
Certify a group of operators

To certify an individual operator, refer to *Certify an individual operator*.

To certify a group of operators, follow these steps:

1. Click the Operators tab.
   The **Operators** screen opens, as shown.

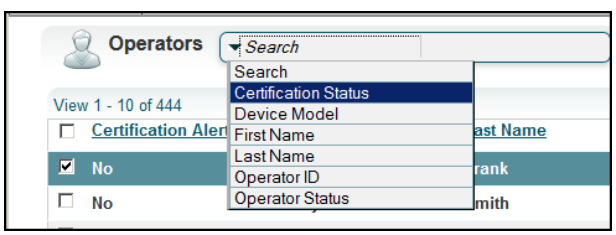
Figure 5-33: Operators screen



The List pane lists all operators registered in Info HQ Manager. The Certificate tab in the Details pane displays the operator's current certification status for each device.

2. Filter the operator list as follows (see *Filter results using drop-down lists* for detailed information on filtering):
   a) Click the filter drop-down and select **Certification Status**, as shown.

Figure 5-34: Certification Status search filter



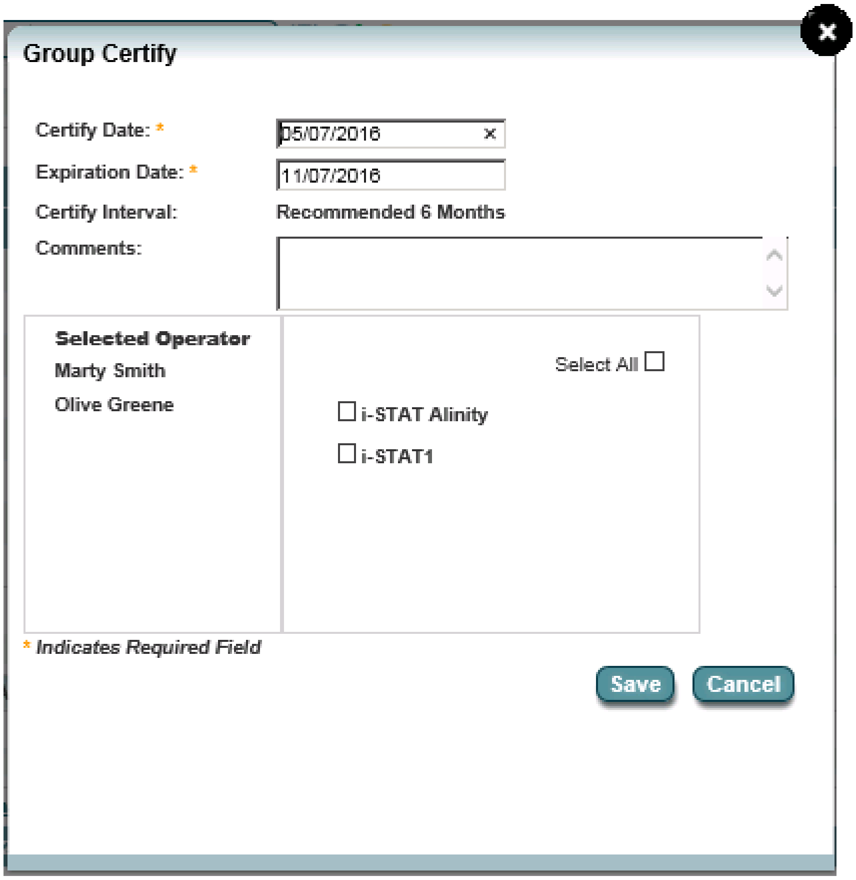
   b) Click the filter drop-down to the right of **Certification Status** and choose **Never**.
   The **Operator** screen refreshes and displays all operators who have never been certified.

3. In the Operators list, select one or more operators by clicking the boxes in the left-hand column, or use the select all box (at the top of the column) to select all operators in the current view.

   Note: If group certification is being done as a result of a training session, use the training completion records (likely in paper form) to identify which operators to select.

4. Click .
   The **Group Certify** dialog box opens. The selected operators are listed in the bottom-left of the box and the devices available and registered with Info HQ Manager are listed in the bottom-right.

Figure 5-35: Group Certify dialog box



5. By default, the **Expiration Date** field is preset to expire the certification in 6 months. If necessary, click the date and use the calendar widget to select a different expiration date.
6. In the **Comment** field, enter a comment related to this certification action.
7. In the list of devices, check the devices for which to certify the operators. Click the **Select All** box to select or deselect all devices at the same time.
8. Click **Save**.
9. Click **OK** in the confirmation box.
   Info HQ Manager certifies the selected operators for the selected devices, updates their certification status to Certified, and removes them from the currently filtered list of operators.
10. Filter the Operators tab for a Certification Status of Certified to see the newly certified operators.

Recertify a group of operators

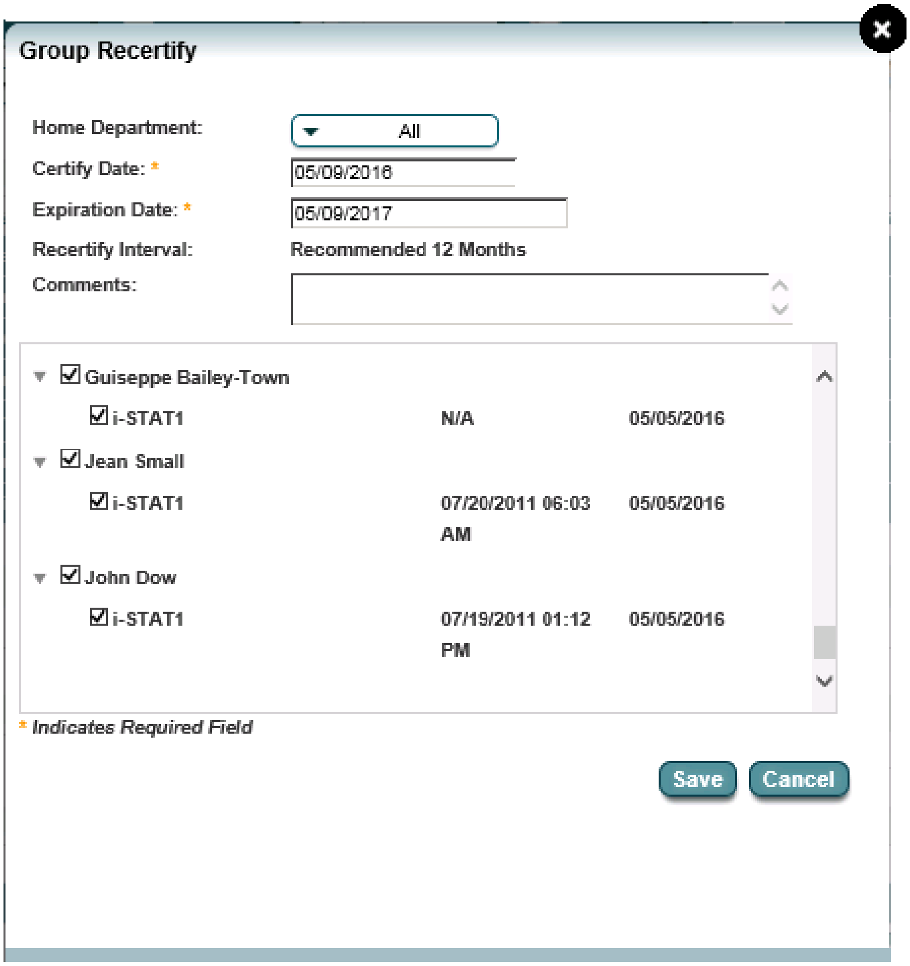
Follow these steps to recertify a group of operators on one or more devices:

1. Click the Operators tab.
   The **Operators** screen opens, as shown in *Figure 5-9: Operators screen*. The List pane lists all operators registered in Info HQ Manager, and the Certificate tab in the Details pane displays current certification status for each device.

2. Click. 

   The **Group Recertify** dialog box opens, as shown. The lower portion of the dialog box lists all operators from all locations.

Figure 5-36: Group Recertify dialog box



3. If desired, use the **Home Department** drop-down list to filter and narrow the list of operators to a specific location.
4. By default, the **Expiration Date** field is preset to expire the certification in 12 months from today. If necessary, enter a different expiration date.
5. In the **Comment** field, enter a comment related to this recertification action. Comments are optional.
6. In the lower portion of the dialog box, click the arrow to the left of the operator to expand the operator and allow selection of a specific device model.

   Then check the device models for which the operator is to be recertified. Checking an operator automatically checks all device models for the operator.
7. When finished checking the device models for all the operators being recertified, click **Save**. Info HQ Manager recertifies the selected operators.
8. Click **OK** in the confirmation box.

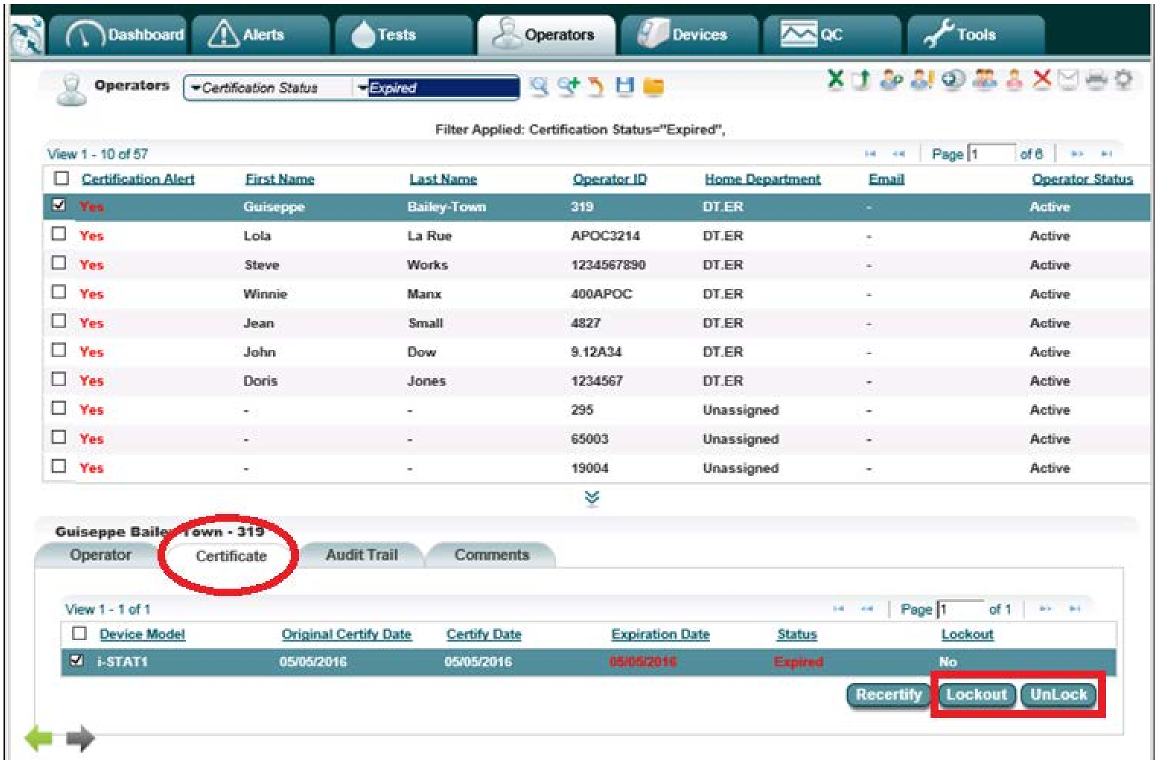
Lock or unlock a device model for an operator

In Info HQ Manager, an authorized user can place a lock on a certification for an operator to prevent him or her from running patient tests on a particular device model. In addition, authorized users can also unlock a device model for an operator.

To lock or unlock a device model for an operator:

1. Click the **Operators** tab, and select the operator.

Figure 5-37: Certificate tab



2. Click the **Certificate** tab in the Details pane.

3. Ensure that the device model is selected, then click Lockout to lock the device model UnLock to unlock it.

Change the notification time for expiring certifications

Info HQ Manager can be configured to automatically send a daily email notification to an operator and the operator's manager when the certification on a device model is nearing expiration or has expired.

The *Certification Email Notification* configuration setting determines whether Info HQ Manager will send email to notify the operator and manager that a certification has expired or is about to expire. The default value is No. If the *Certification Email Notification* setting is Yes, then the notifications are sent based on the *Certification Expiring Notification* setting.

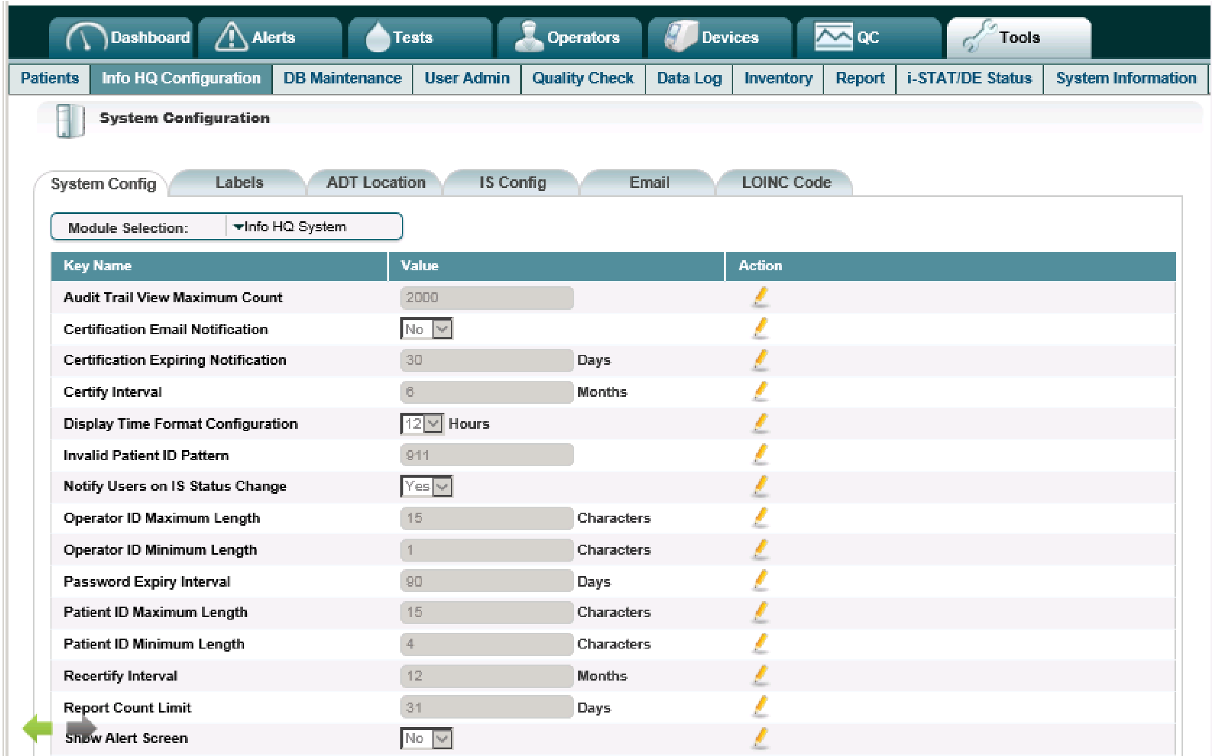
The *Certification Expiring Notification* configuration setting specifies when an operator certification is due to expire. If the *Certification Email Notification* setting is Yes, then the *Certification Expiring Notification* also specifies the, number of days in advance of the expiration that an alert will be generated and an email notification sent to the operator and manager.

Perform these steps to change the number of days in advance to receive email notification and alerts for expiring certifications:

1. Click the Tools tab.

   The **Info HQ Configuration** screen opens.

Figure 5-38: Info HQ configuration screen



2. If Certification Email Notification is set to No, click , and change the value to Yes.
3. Locate **Certification Expiring Notification** under the **Key Name** column, then click . The **Value** field becomes active.
4. In the **Value** field, enter the number of days for advance notification of a certificate that will expire.
5. Click .

5.10 Generate an operator report

Basic reports — based on search filters, the current date range, and the selected location (if applicable) — can be generated from the main screens within Info HQ Manager.

Info HQ Manager can generate the basic Operator List Report, which provides information about all operators in the system.

To generate a basic report, follow the steps in *Generate a report* in section 1, *Getting started*. For advanced reporting features, refer to section 11, *Reports*.

5.11 Email operator information

Info HQ Manager can send pre-scripted email messages to the administrator account and to selected operators and their managers. The message contains basic information about the operator, including the operator's certification data.

Before emails can be sent, this functionality must be enabled and configured within the Info HQ Manager configuration. See the *Info HQ Manager Implementation Guide* for instructions on using the email configuration settings.

Click the Operators tab, then refer to *Email data* in section 1, *Getting started*, for steps on how to send an email message.

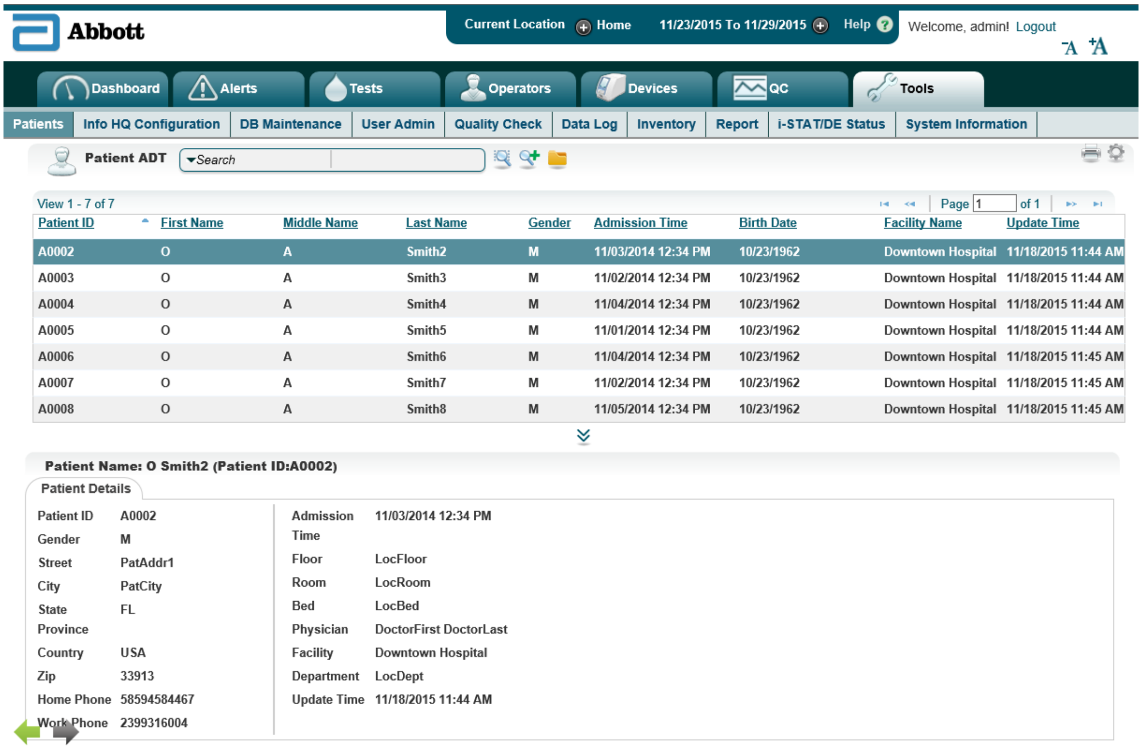
6 - Patient management

Info HQ Manager can be configured to receive patient Admission, Discharge, & Transfer (ADT) data from an HIS or EMR system. This section describes how to view and manage patient information when Info HQ Manager is configured to receive ADT data.

6.1 View patient information

Info HQ Manager receives patient ADT data from an HIS system. To review the ADT information for patients, click the Tools tab and then the Patients secondary tab.

Figure 6-1: Patients ADT screen



The List pane lists basic information about patients, including the patient ID and the admission date and time. If necessary, use the Search drop-down list to filter the list.

The Details pane has a Patient Details tab that provides detailed information about the patient who is selected in the List pane.

6.2 Generate a patient report

Basic reports — based on search filters, the current date range, and the selected location (if applicable) — can be generated from the main screens within Info HQ Manager.

If configured to receive ADT data, Info HQ Manager can generate the basic Patient List report, which lists all patient results received from an HIS or EMR system.

To generate a basic report, follow the steps in *Generate a report* in section 1, *Getting started*. For advanced reporting features, refer to section 11, *Reports*.

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7 - Device management

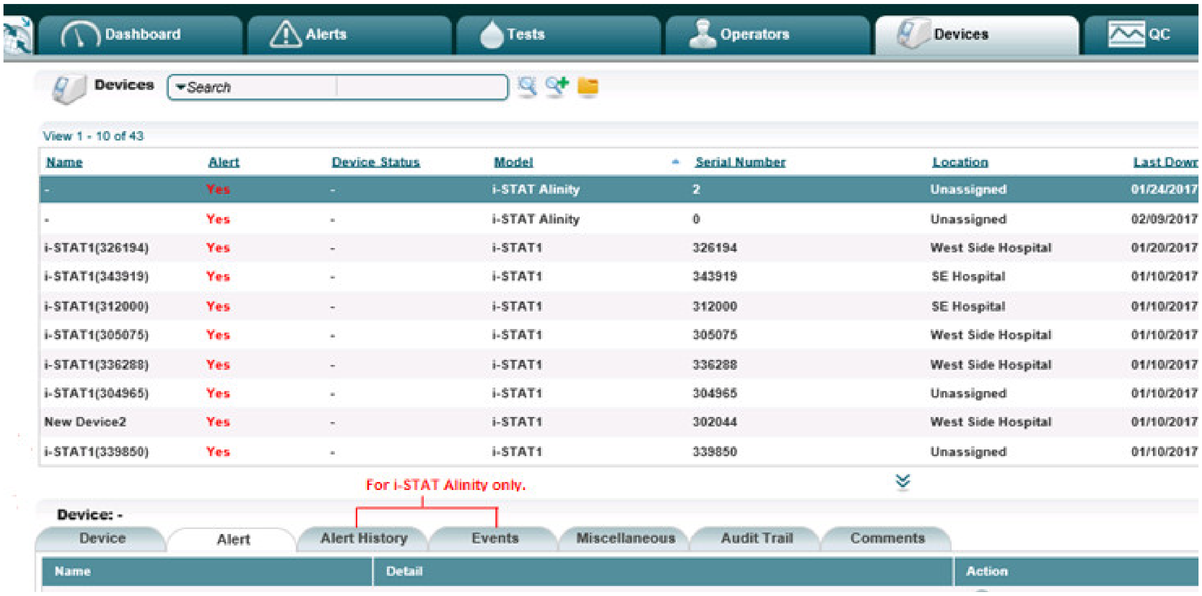
Info HQ Manager can manage data received by hundreds of point-of-care testing (POCT) devices in the healthcare organization. In addition, Info HQ Manager can be configured to notify the POCC if a device has been disconnected or if the device has not sent patient testing data to Info HQ Manager within a specified length of time. (See the *Info HQ Manager Implementation Guide* for information on how to configure Info HQ Manager.)

This section describes how to manage POCT devices registered in the Info HQ Manager system, and how to view the connection status of all information system devices.

7.1 View a summary of POCT devices

Click the Devices tab to review a list of all POCT devices registered and monitored in Info HQ Manager.

Figure 7-1: Devices screen



The List pane of the **Devices** screen displays the following information for each device:

Table 7-1: Devices screen: Columns displayed in the List pane

Column	Description
Name	Name of the device.
Alert	Whether the device has associated alerts. The Alert tab in the Details pane provides more information about the type of alert.
Device Status	Current status of the device.
Model	Model of the device.
Serial Number	Serial number of the device.
Location	Location within the organization to which the device is assigned.

Column	Description
Last Download Time	Last time Info HQ Manager received patient, liquid control, or electronic quality control test results from the device.
In Service Time	Date and time that the device was initially registered or added to Info HQ Manager.
Test Count	Cumulative number of patient, electronic QC, and Liquid QC tests that have ever been performed with the device.

The Details pane contains the following tabs that provide additional information for the device that is selected in the List pane:

Table 7-2: Devices screen: Tabs displayed in the Details pane

Tab	Description
Device	Detailed information about the device, for example its model, serial number, IP address, and location within the healthcare organization.
Alert	Any alerts associated with the device.
Alert History	Details about past alerts for the device. This tab is displayed only for i-STAT Alinity devices.
Events	Not currently supported.
Miscellaneous	Additional information about the device, for example whether it is marked for repair.
Audit Trail	All audit trail records for the device. See *View the audit trail* for more information.
Comments	Comments added by users. See *Add comments* for more information.

Sort the results

Use the column headings to sort the list of devices. For more information about how to sort, see *Sort the results* in section 1, *Getting started*.

Search for a device

The list of devices in the **Devices** screen might span multiple pages, depending on how many devices are registered with Info HQ Manager. If a device is not listed on the first page, search the list based on:

Device model Model of the device.

Device name Name assigned to the device.

Device serial number Serial number of the device.

Last download location Last location from which results were received. This is useful to help find a device that has been misplaced.

To search for a device, refer to *Filter the results* and *Filter results using search strings* in section 1, *Getting started*.

7.2 View details about a specific device

Follow these steps to view details about a specific device:

1. Click the Devices tab to display the **Devices** screen.

2. Select the desired device in the List pane.

3. Click through each of the tabs in the lower Details pane to display information about the device.

7.3 Add an individual device

Complete this task to add an individual device to Info HQ Manager. For information about uploading a group of devices, see section *Add a group of devices*.

Prerequisites:

Obtain the following information from the person or team responsible for configuring the device:

- Device model name, for example i-STAT1
- Serial number of the device to distinguish it from other devices of the same type
- For an i-STAT 1 downloader device, obtain the static IP address of the downloader
- The location (department or area) within the healthcare system where the device resides. For example, DT.ER is the ER department in the Downtown Hospital.
- **Important:** For i-STAT 1 or i-STAT 1 downloader devices only, ensure that i-STAT/DE has been configured to communicate with Info HQ Manager.

Follow these steps to add a device to the Info HQ Manager system:

1. Click the Devices tab.

2. Click , near the top-right of the screen.

Figure 7-2: Location of the Add Device icon

The **Add Device** dialog box opens.

Figure 7-3: Add Device dialog box

3. Complete the dialog box as follows:

- Use the data gathered under *Prerequisites* to complete the **Model**, **Name**, **Serial Number**, and **Location** fields.
- In the **Model** drop-down list, select the model of the device to be added, for example, i-STAT1.
- In the **Name** field, enter a name to associate with the device. Device names cannot include the ampersand (&) or tilde (~) characters.
- The **IP Address** field is used only when adding an i-STAT 1 downloader device. Enter the static IP address of the downloader.
- In the **Location** field, click , and select a location (department or area) for the device.
- It is not necessary to complete the **Port** field, which is read-only.
- The **Reporting Type** field specifies how an i-STAT 1 handheld device will report test results, and the location from which it will receive customizations.
  - The Reporting Type drop-down list is available only for i-STAT 1 devices.
  - When **Logical** (the default) is selected, the handheld device will always report results and receive customizations at the location where it exists in the Info HQ Manager hierarchy.
  - When **Physical** is selected, the handheld device will report test results and receive customizations based on the location of the downloader device from which it transmits data. This means that the **Physical** setting can be used to support a handheld device that roams from one department to another.

4. Click **Save**.

The new device is added. Note that the new device might not be listed on the first page of listed devices. If not, use the page widget near the upper-right of the screen, as shown, to scroll through the pages to locate the new device.

Figure 7-4: Widget for selecting pages

Note: i-STAT 1 downloaders are not displayed in the list of devices by default. To view the downloader, use the Search filter and the Device Model option to display a list of all i-STAT 1 downloaders.

Note: Connectivity between Info HQ Manager and an i-STAT device differs depending on the device model. For i-STAT 1, communication occurs through the i-STAT/DE system, while i-STAT Alinity and Info HQ Manager communicate directly with one another. For detailed information about connectivity between Info HQ Manager and i-STAT devices, see the *Info HQ Manager Implementation Guide*.

7.4 Add a group of devices

When there are multiple devices to add to the Info HQ Manager system, it might be faster and easier to add them all at once using the upload function.

Info HQ Manager includes a devices template, in spreadsheet format (.csv), for automating the addition of multiple devices to the system. The first few steps of this procedure provide instructions on how to download and prepare the template. Here is an example of the template populated with sample device data.

Figure 7-5: Example device template

DeviceModel_Name	Name	SerialID	IPAddress	Location_Name
i-STAT1	i-STAT1(317028)	317028		DT.ER
i-STAT Downloader	Auto Assigned 1		10.10.90.47	DT.PED
i-STAT Alinity	i-STATAlinity(316531)	316531		DT.CARD

<u>Download the template</u>.

1. Click the Devices tab.
2. Click to export the device template file.
3. From the drop-down list, select a template file, for example DeviceExcelTemplate. Then click **Generate**.
4. In the Open dialog box, choose **Save File** and click **OK**.
   The template file is saved to the current computer's Downloads folder. It has a .csv file extension.

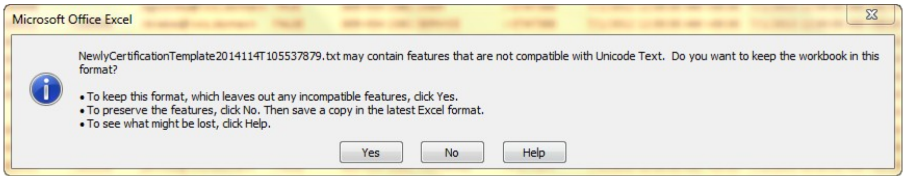
<u>Prepare the template file.</u>

5. Locate and open the template file in Microsoft® Excel® or a similar spreadsheet program.
6. In the template, locate the first blank row below the column headings.
7. Using the example in *Figure 7-5: Example device template* as a guide, enter the data for each device to be added. Note the following when entering the information:

- Each device must be on a separate row.
- Device names cannot include the ampersand (&) or tilde (~) characters.
- The device serial number must not exceed 16 characters.
- Device names and IP addresses must not exceed 20 characters each.
- The name entered for the Device Model must be spelled exactly as it appears in Info HQ Manager, but it is not case-sensitive.
- The Device Name is a descriptive name to be associated with the device, such as *ICU i-STAT*.
- The serial number of the device must be entered to distinguish it from other devices of the same type.
- For an i-STAT-1 downloader device, enter the static IP address of the downloader under the IPAddress column. For other devices, this column can be left blank.
- The Location Name is the primary department or area within a department in which the device resides. It must be spelled exactly as it appears in Info HQ Manager, but it is not case-sensitive. Note that the Location Name must not exceed 20 characters.

8. Save the template file.
If presented with a dialog box similar to the one shown here, click **Yes**.

Figure 7-6: Microsoft® Excel® compatibility dialog



Upload the completed template file to Info HQ Manager, which uses the data in the file to add the specified devices.

Note: Adding a new device with a serial number that matches a deleted device, it will activate the deleted device and update it with all of the information for the new device, such as device name, model, and location.

9. In the Info HQ Manager **Devices** screen, click to display the **Upload** dialog box.

10. Click **Browse**, navigate to the folder containing the device template file, then click **Open** in the dialog box.

11. Click **Submit**.
Depending on how many devices are added, there might be a delay as the devices are added. A completion message inside the **Upload** dialog box indicates the number of devices that were successfully added.

12. Close the **Upload** dialog box.

<u>Verify the results.</u>

13. Click the Devices tab to refresh the **Devices** screen and view the list of devices.

Note that the new devices might not be listed on the first page of listed devices. If not, use the page widget near the upper-right of the screen, as shown, to scroll through the pages to locate the new device.

Figure 7-7: Widget for selecting pages

Note: i-STAT 1 downloaders are not displayed in the list of devices. To view the downloaders, use the Search filter and the Device Model option to display a list of all i-STAT 1 downloaders.

Note: Connectivity between Info HQ Manager and an i-STAT device differs depending on the device model. For i-STAT 1, communication occurs through the i-STAT/DE system, while i-STAT Alinity and Info HQ Manager communicate directly with one another through the POCT1-a communication protocol. For detailed information about connectivity between Info HQ Manager and i-STAT devices, see the *Info HQ Manager Implementation Guide*.

7.5 Change a device location

A device might be moved from one location to another within an organization, facility, or department.

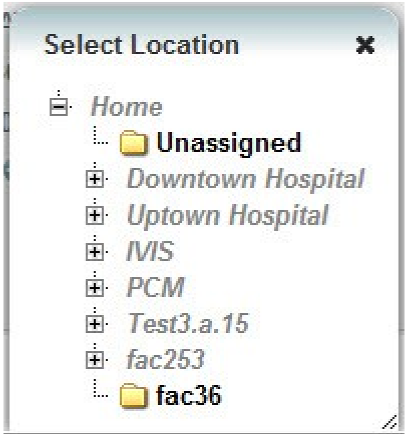
1. Click the Devices tab.

2. In the List pane, select the device to change. Note that the device might not be listed on the first page of listed devices.

3. In the Details pane, click the Device tab.

4. Click to display the **Select Location** pop-up.

Figure 7-8: Select Location pop-up



5. Click the plus icon to expand the location hierarchy until the desired location is listed, then click the location to select it.

   The **Devices** screen refreshes and updates the device information with the new location.

7.6 Mark a device for repair

When a device is in maintenance for repair, it should be marked as such in Info HQ Manager. When a device is marked for repair, Info HQ Manager suspends monitoring of the device and does not report alerts for the device, for example an alert that the device is disconnected or that it has not downloaded results.

Follow these steps to mark a device for repair:

1. Click the Devices tab.
2. In the List pane, select a device.
3. In the Details pane, click the Miscellaneous tab.
4. Check the **Mark for Repair** box.
5. Click **OK** in the confirmation box.

The device is marked for repair. No alerts will be generated for the device until the **Mark for Repair** box is unchecked.

Note: To view devices marked for repair, click **In Repair** on the Dashboard screen.

7.7 Delete a device

Devices can be deleted from the Info HQ Manager. An alternative to deleting a device, when the device has test results, is to mark the device for repair. Refer to *Mark a device for repair* for more information.

Perform the following steps to delete a device from the Info HQ Manager system:

1. Click the Devices tab.
2. In the List pane, select a device.
3. Click .
4. Click **OK** to delete the device.

7.8 Generate a device report

Basic reports — based on search filters, the current date range, and the selected location (if applicable) — can be generated from the main screens within Info HQ Manager.

Info HQ Manager can generate the basic Devices List Report, which provides information about all devices registered in the Info HQ Manager system.

To generate a basic report, follow the steps in *Generate a report* in section 1, *Getting started*. For advanced reporting features, refer to section 11, *Reports*.

7.9 Email device information

Info HQ Manager can send pre-scripted email to a specified individual for the selected device record.

To email device information to an individual, click the Devices tab. Then refer to *Email data* in section 1, *Getting started*, for steps on how to send an email message.

7.10 Check the connection status of Information System devices

Use the **System Information** screen to view the status of all information systems that communicate with Info HQ Manager.

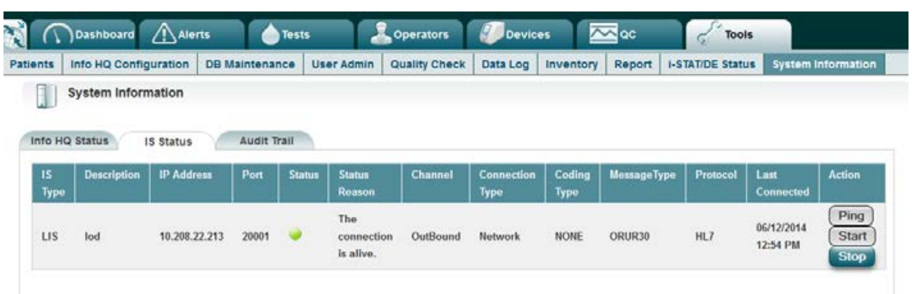
To check Info HQ Manager's connection status to all HIS and LIS systems, follow these steps:

1. Click the Dashboard tab.
2. Click the **LIS** or **ADT** status text as shown.

Figure 7-9: Information System indicators

The **System Information** screen opens, with the IS Status tab selected by default.

Figure 7-10: System Information screen: IS Status tab



The IS Type, Description, and IP Address columns identify the information system, and the Status column displays a status indicator representing the connection status. The following table describes each status indicator color.

Table 7-3: IS connection status indicators

Indicator color	Description
Green	Connection to the information system is up.
Red	Connection to the information system is down.
Yellow (HIS only)	Connection to the information system is idle, and Info HQ Manager has not received data within the expected time period. The default is 30 minutes. (See the *Info HQ Manager Implementation Guide* section on system configuration settings for information about changing the HIS Allowable Inactivity Period setting.)

Each connection type has a **Start** and **Stop** button. Use these buttons to temporarily start or stop a connection to the information system.

Each connection type also has a **Ping** button. Use this button to check the network availability of the connection, when the connection between Info HQ Manager and the information system is a network connection (not a serial connection).

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8 - Inventory management

The following sections provide instructions for viewing the current cartridge lot inventory, adding cartridge lots, and editing information about cartridge types and cartridge lots.

8.1 View cartridge lot inventory

The cartridge lot inventory shows all of the cartridge lots that Info HQ Manager is managing. When the Cartridge Lot QC feature is enabled, additional information is displayed. The Cartridge Lot QC feature is enabled by default when Info HQ Manager is installed. For more information about the Cartridge Lot QC Enabled setting, see the *Implementation Guide*. Cartridge Lot QC is a feature that provides a means of managing the quality of i-STAT Alinity cartridge lots in the system, and communicating cartridge lot quality statuses to the device. The Cartridge Lot QC feature supports the following actions:

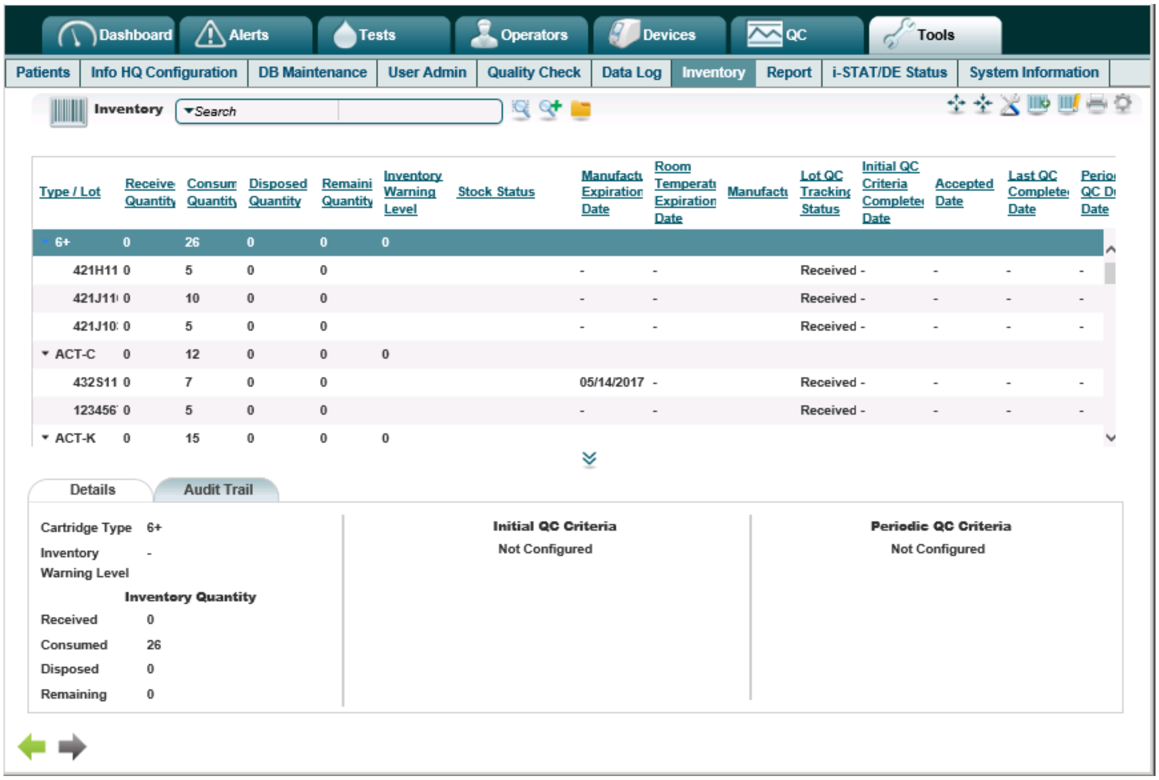
- Cartridge lot QC criteria configuration
- Cartridge lot QC status management
- Uploading cartridge lot status to the i-STAT Alinity device

To view the current cartridge lot inventory and QC data, complete the following steps:

1. Click the Tools tab.
2. Click the Inventory secondary tab.

   Note: The following image shows the Inventory screen with Cartridge Lot QC enabled.

Figure 8-1: Cartridge Lot Inventory screen



Use the vertical scroll bar to move up and down the list. Click the arrow next to the name of a cartridge type to collapse or expand the list of cartridges for that type.

The List pane displays the following information:

Table 8-1: Cartridge Lot Inventory screen: Columns displayed in the List pane

Column	Description
Type/Lot	Cartridge type or lot number as scanned from the barcode on the cartridge lot pouch. Expand the cartridge type to see the corresponding lot numbers.
Received Quantity	Total count of cartridge lots (per lot number or cartridge type) that have been received.
Consumed Quantity	Total count of cartridge lots (per lot number or cartridge type) that have been consumed by running tests on medical devices, like i-STAT 1.
Disposed Quantity	Total count of cartridges (per lot number or cartridge type) that have been consumed for reasons other than running tests on medical devices (for example, expired or thrown away).
Remaining Quantity	Total count of in-stock cartridge lots per lot number or cartridge type. This is automatically updated by the system. Remaining quantity for cartridge lots = Purchased - Consumed - Disposed – Manufacturer Expired Remaining quantity for cartridge type = Purchased - Consumed - Disposed – Manufacturer Expired - Rejected
Inventory Warning Level	User-defined count per cartridge type. For example, if the remaining quantity for EC8+ is smaller than its warning level, stock status is alerted with red color. Otherwise, stock status is displayed with green color.
Stock Status	Graphical display for the selected cartridge type based on values of remaining quantity, warning level, and total quantity. For example, if the total quantity for EC8+ is 5215, its remaining quantity is 342, and its warning level is set as 100, the stock status is displayed with green color because 342 > 100. 
Manufacturer Expiration Date	The manufacturer's expiration date. It is customizable while could be automatically updated if it is available during communication with i-STAT Alinity.
Room Temperature Expiration Date	The customized date that indicates when the cartridges will expire when stored at room temperature.
Manufacturer	Manufacturer of the cartridge lot.
Acceptance Status	The stage in the acceptance process the cartridge lot is in. The default value is Received

Column	Description
Lot QC Tracking Status	Indicates where the cartridge lot is in the tracking process: received, Initial QC in Progress, QC Requirement Met, etc.
Initial Criteria Complete Date	The date that the initial cartridge lot QC testing was completed and accepted.
Accepted Date	The date that the cartridge lot was accepted.
Last QC Completed Date	The date that the last cartridge lot QC testing was passed.
Periodic QC Due Date	The date that the cartridge lot is due to be retested for performing patient test.

The lower part of the screen displays the following information about the cartridge lot that is selected in the List pane.

Figure 8-2: Cartridge Lot Inventory screen: Details view

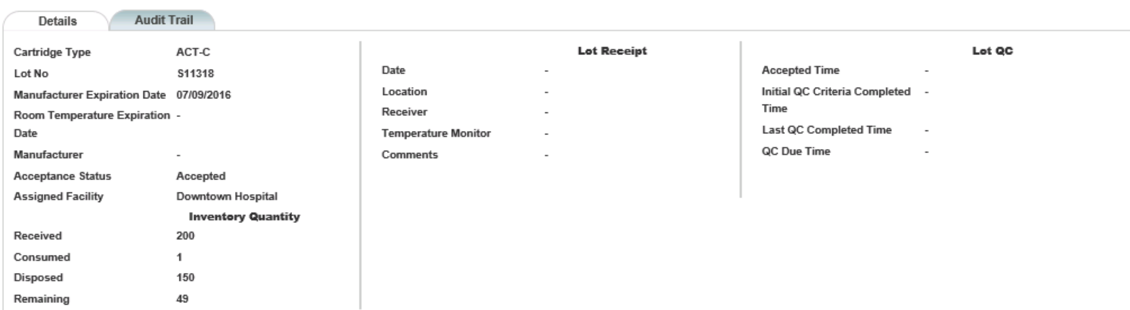


Table 8-2: Tabs displayed in the Details pane

Tab	Description
Details	• When a cartridge type is selected, displays details about the selected cartridge type. • When a cartridge lot is selected, displays details about the selected cartridge lot.
Audit Trail	Details about actions performed on the selected cartridge type or cartridge lot — including time and date, who performed the action, and other details.

Figure 8-3: Cartridge Lot Inventory screen: Details view for i-STAT Alinity

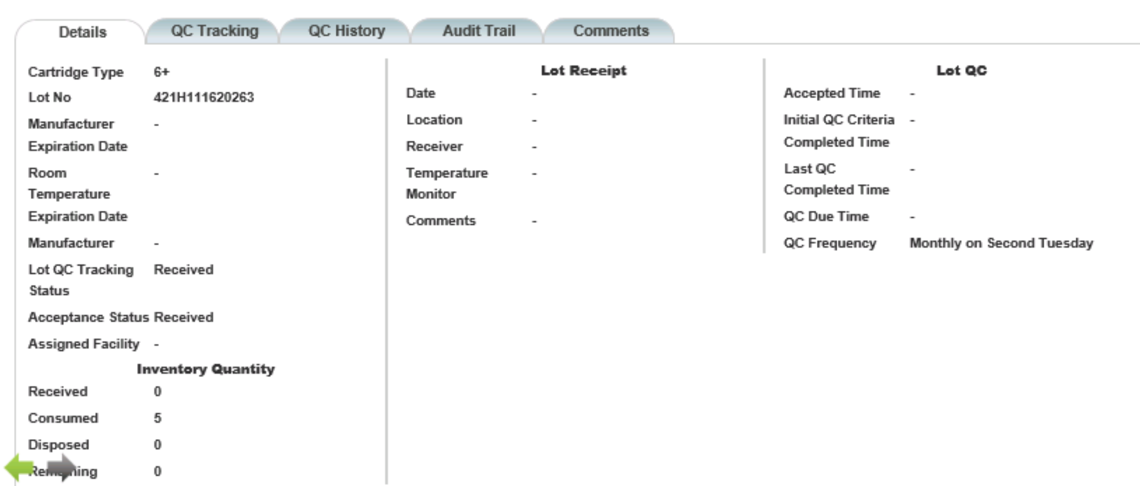


Table 8-3: Cartridge Lot Inventory screen: Tabs displayed in the Details pane for i-STAT Alinity

Tab	Description
Details	• When a cartridge type is selected, displays details about the selected cartridge type. • When a cartridge lot is selected, displays details about the selected cartridge lot.
QC Tracking	Details about cartridge lot current QC compliance.
QC History	Displays cartridge lot QC compliance history.
Audit Trail	Details about actions performed on the selected cartridge type or cartridge lot — including time and date, who performed the action, and other details.
Comments	Comments regarding selected cartridge lot.

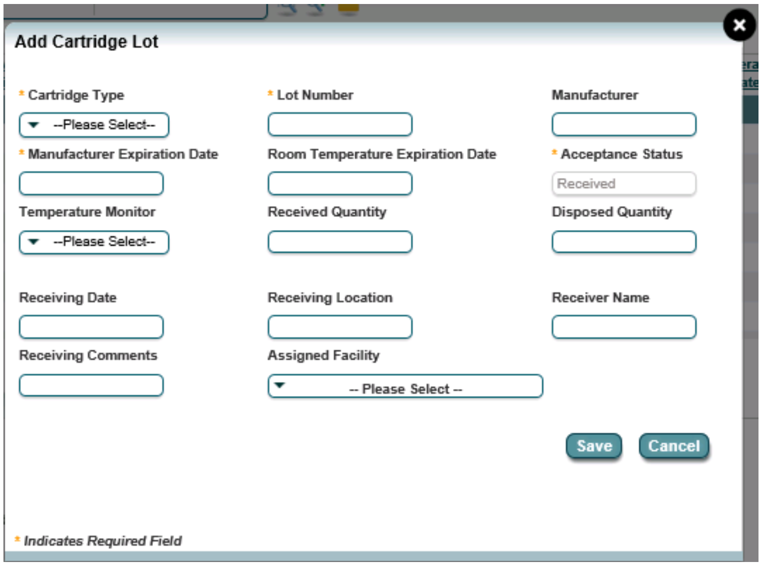
8.2 Add a cartridge lot to the inventory

A best practice for adding cartridge lots to the Info HQ Manager system is to run a successful control test and upload it to automatically register a cartridge lot. Note that the lot number printed on the cartridge box or pouch is just a portion of the full lot number that Info HQ Manager requires.

To add a cartridge lot to the inventory:

1. Click the **Tools** tab.
2. Click the **Inventory** secondary tab.
3. Click .
   The **Add Cartridge Lot** dialog box opens.

Figure 8-4: Add Cartridge Lot dialog box



4. Describe the new cartridge lot by completing the fields as follows.
   Note: Fields marked with an asterisk (*) are required.
   a) Select a cartridge type using the drop-down list.
   b) Enter text to identify the **Lot Number**.
   c) Supply the **Manufacturer Expiration Date** and, optionally, the **Receiving Date** by

clicking on each field and using the calendar widget.

d) If your facility requires verification of the cartridges' temperature upon receipt, select the appropriate value using the **Temperature Monitor** drop-down list: Pass, Fail, or Undefined.

e) Complete other fields as needed.

5. Click **Save**.
The **Add Cartridge Lot** dialog box closes, and the new cartridge lot is added to the main list in the **Inventory** screen.

8.3 Edit a cartridge lot in the inventory

To edit a cartridge lot in the inventory:

1. Click the Tools tab.
2. Click the Inventory secondary tab.
3. In the List pane, select the cartridge type to edit.
4. Click .
   The **Edit Cartridge Lot** dialog box opens.

Figure 8-5: Edit Cartridge Lot dialog box

Note: Fields marked with an asterisk (*) are required.

5. Update fields as needed, then click Save.

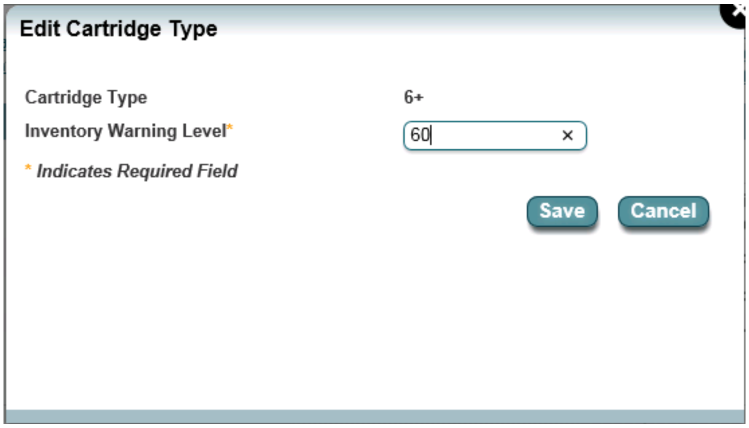
8.4 Edit the inventory warning level in inventory

To edit a cartridge type in the inventory, complete the following steps:

1. Click the **Tools** primary tab.
2. Click the **Inventory** secondary tab.
3. In the List pane, select the cartridge type to edit.

4. In the toolbar, click . The Edit Cartridge Type dialog opens.

Figure 8-6: Edit Cartridge Type dialog



5. In the Inventory Warning Level field, specify the minimum number of remaining cartridges (0-60) that must exist in a lot before a warning is displayed in the Stock Status column of the List view. For example, in the previous screen shot, the Cartridge Type is 6+, and the Inventory Warning Level is 60. This will cause the warning to display when a cartridge lot of type 6+ has fewer than 60 remaining cartridges which are not manufacturer expired or rejected.

6. Click Save

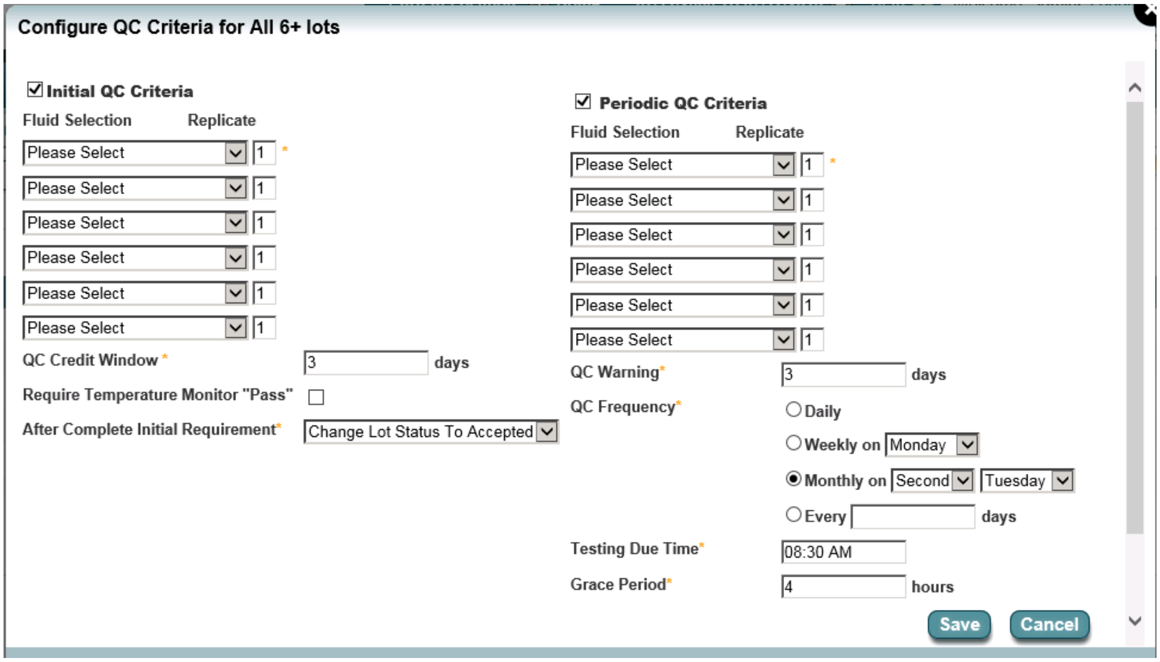
8.5 Configure cartridge lot QC criteria

Cartridge lot QC criteria are the requirements that a cartridge lot must meet before it can be accepted for performing patient test.

To configure cartridge lot QC criteria, complete the following steps:

1. Click the Tools tab.
2. Click the Inventory tab.
3. In the toolbar, click . As an example, dialog box of Configure QC Criteria for All 6+ Lots opens.

Figure 8-7: Configure QC Criteria for All 6+ Lots dialog



4. Select the **Initial QC Criteria** check box.
   a. Under **Fluid Selection for the Initial QC Criteria**, select up to six types of fluids for QC, and specify the number of times the QC test must be replicated. QC tests can be repeated 3 times maximum per fluid selection.
   b. In the **QC Credit Window** field, type the number of days within which the QC test must be credited.
   c. Optional. Select the **Require Temperature Monitor "Pass"** check box.
   d. In the **After Complete Initial Requirement** drop-down list, select the action to be taken after the initial QC criteria requirements are all met.
5. Optional. Select the **Periodic QC Criteria** check box, and complete the following fields. These fields are valid only if the Periodic QC Criteria check box is selected.
   a. Under **Fluid Selection**, select up to six types of fluids for QC, and specify the number of times the QC test must be replicated.
   b. In the **QC Warning** field, type the number of days. If it is set as 5, Periodic QC Due warning will be generated 5 days before QC Due date.
   c. In the **QC Frequency** field, specify how often the cartridge lot should be retested.
   d. In the **Testing Due Time** field, specify the time when the testing is due.
   e. In the **Grace Period** field, specify the number of hours past the QC Due Time while the patient test can still be performed.
   f. Click 

. The criteria are displayed in the Details area on the Details tab.

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9 - Quality control management

This section describes how to manage quality control (QC) to ensure that a given device and any cartridges it uses have been tested and shown to meet quality standards for reliable and accurate patient testing.

9.1 View QC tests

Click the QC tab to review QC tests from any device that Info HQ Manager is monitoring. The **QC** screen opens.

Figure 9-1: QC screen overview

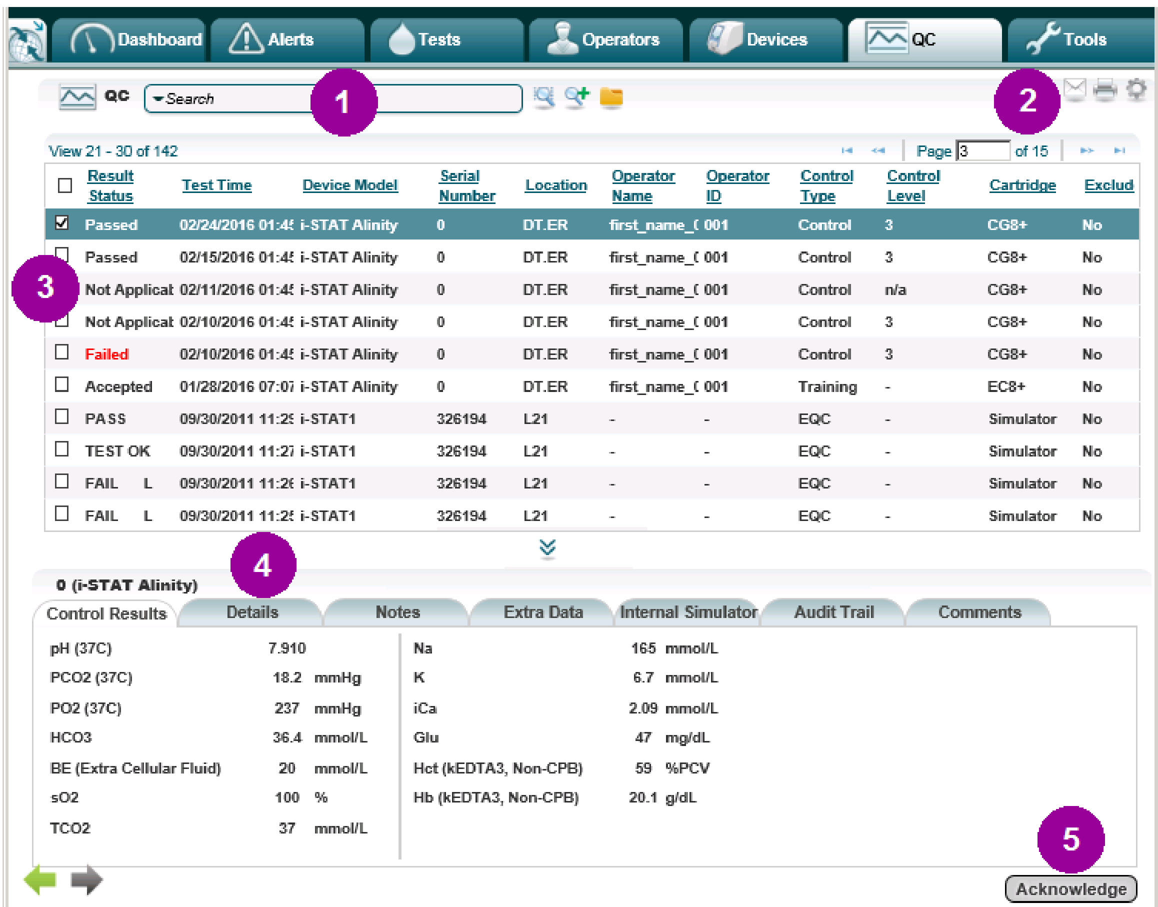


Figure 9-2: QC screen overview — i-STAT Alinity EQC tests

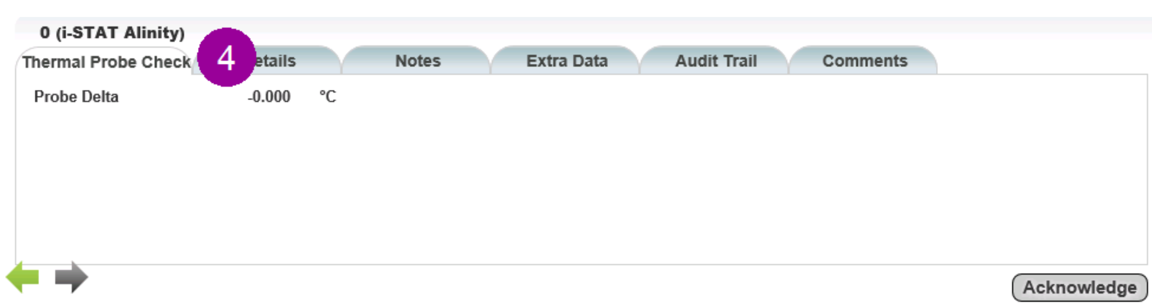


Table 9-1: QC screen overview

Item	Description
1	Search. See ***Filter the results*** and ***Filter results using search strings*** for more information.
2	Icons that perform tasks related to QC test results. Roll the mouse over an icon for a description.
3	Results list. To narrow the display, select filtering criteria from the Search drop-down list.
4	Details pane containing the following tabs that provide additional information for the selected test: • **Control Results tab:** Detailed panel-by-panel measurements for the test record that is selected in the main list. • **Thermal Probe Check:** Displayed only for i-STAT Alinity EQC test results. Provides the results of a thermal probe check on the cartridge. • **Details tab:** Detailed information about the test including type of test, time and date, operator information, device information, and associated alerts. • **Notes tab:** (i-STAT Alinity only.) Any comments entered by users before, during, or after running a test, and critical callbacks. • **Extra Data tab:** Additional information about the selected QC test record — for example control and cartridge lot information; environmental data (temperature and pressure); the firmware version currently installed in the device model; and for i-STAT 1, internal simulator results. i-STAT Alinity displays these results on the Internal Simulator tab. **Note:** The content of the Extra Data tab depends on the selected QC control type. • **Internal Simulator tab:** (i-STAT Alinity only.) Displays the results from i-STAT Alinity's internal simulator. • **Audit Trail tab:** Events associated with the selected QC test record. See *View the audit trail* for more information. • **Comments tab:** A list of comments that were added to the selected test. New comments can also be added. See *Add comments* for more information.
5	When a failed QC test is selected, click this button to acknowledge the alert associated with the failed QC test.

List pane

The List pane of the **QC** screen displays the following information:

Table 9-2: QC screen: Columns displayed in the List pane

Column	Description
Result Status	Whether the device passed or failed a given QC test.
Test Time	The date and time the QC test was performed.
Device Model	The equipment type or model.
Serial Number	The unique number assigned to the device.
Location	The location where the QC test was performed.
Operator Name	The Name of the operator who performed the QC test.
Operator ID	The ID of the operator who performed the QC test.
Control Type	The type of QC test performed, for example Control, Cal-Ver, or Proficiency.
Control Level	The level of control used in the QC test, for example **Low**, **Normal**, and **High**.
Cartridge	The type of cartridge used in the QC test.
Excluded	Whether the QC test result has been excluded (see *Exclude QC test results*)

QC test types

Info HQ Manager monitors the following categories of QC tests.

Table 9-3: QC test types monitored by Info HQ Manager

QC test type	Verifies
Control	Device and cartridge are within known target values and acceptable limits.
Proficiency	Facility is proficient for running tests.
Electronic Simulator (EQC)	Device passes electronic QC tests.
Calibration Verification	Device is properly calibrated to measure results within known target values and acceptable limits.

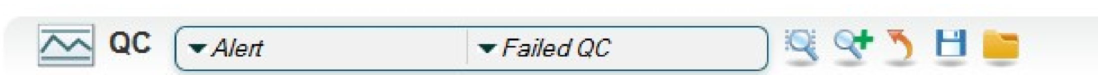
View all acknowledged or unacknowledged failed QC tests

Use Info HQ Manager to view acknowledged and unacknowledged failed QC tests.

To view a list of acknowledged or unacknowledged failed QC tests, perform these steps:

1. Click the **QC** tab.
2. In the Search drop-down list, select **Alert** and **Failed QC**.

Figure 9-3: Viewing failed QC test results



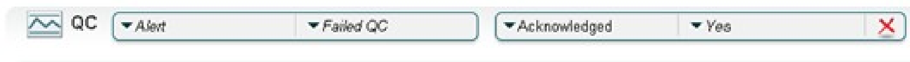
Note: Acknowledged QC tests are not included in the list of Failed QC alerts.

3. Click .

4. In the drop-down list to the right of **Failed QC**, select **Acknowledged**. Then choose one of the following:

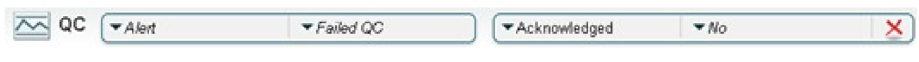
- **Yes** to display a list of failed QC tests that have been acknowledged.

Figure 9-4: Viewing failed QC tests that have been acknowledged



- **No** to display a list of failed QC tests that are not acknowledged.

Figure 9-5: Viewing failed QC tests that are not acknowledged



Acknowledge a failed QC test

Info HQ Manager can acknowledge failed QC tests to remove them from the Failed QC alerts list. For steps on how to acknowledge failed QC tests, see *Acknowledge a Failed QC alert* in section 3, *Alert management*.

Exclude QC test results

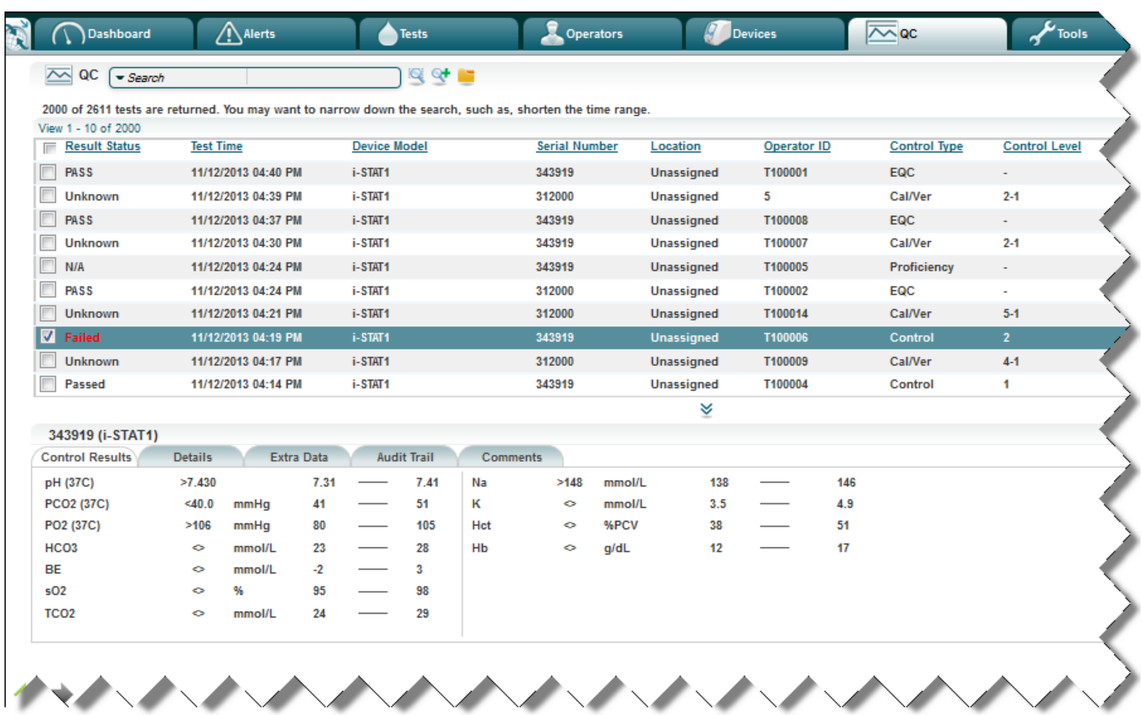
The POCC might want to exclude QC test results when it is known that the test results are erroneous. For example, when running a QC test the operator mistakenly scanned a control lot barcode that was not used in the QC test. The test results do not match the expected test results for the control solution used.

QC test results with a status other than *passed* can be excluded.

To exclude one or more QC test results, perform these steps:

1. Click the QC tab.
2. In the List pane, place a check mark in the box next to the QC test to be excluded.
   The details of the test results are displayed in the Control Results tab at the bottom of the screen.

Figure 9-6: Selecting a QC test to exclude



3. Click the Details tab. The following screen is displayed.

Figure 9-7: QC Details pane: Details tab for i-STAT 1

4. Check the **Exclude from Reports** box.
5. Click **OK** to confirm.
   Note: The test result is still displayed in the main QC list, but it is marked as excluded.
6. Repeat the process to exclude additional QC test results.

9.2 Generate a QC report

Reports — based on search filters, the current date range, and the selected location (if applicable) — can be generated from the main screens within Info HQ Manager.

Info HQ Manager generates reports for QC test results as listed in the following table.

Table 9-4: QC test reports

Report type	Description
QC Test Result Report	Results for the selected QC tests.
QC Test Result List Report	All QC tests in a list.
Extended EQC Report	A .csv file that displays all extra data items for Electronic Simulator results within the global date range and location. This report returns information only for i-STAT 1 devices.
PV Data Extract QC	Liquid quality control and cal/ver test results used for performance verification. **Note:** This report is available only if **PV Data Extract Enabled** is set to **Yes** in the system configuration settings.

To generate a report, follow the steps in *Generate a report* in section 1, *Getting started*. For advanced reporting features, refer to section 11, *Reports*.

Export QC test results to a file

Info HQ Manager can export test results to a Microsoft® Excel® spreadsheet file, a comma-separated file, a PDF file or .zip folder. See the information in *Generate a report* in section 1.

9.3 Send QC results to the LIS

Info HQ Manager sends QC test results to the LIS either automatically or as the result of an action by an Info HQ Manager user. This feature is enabled using the system configuration parameter *Send QC Results to LIS.* See the *Info HQ Implementation Guide* section on system configuration. Results are sent for liquid control, proficiency, and calibration verification tests.
Note: ORU R31 type messages and LOINC coding are not supported for QC results sent to the LIS.

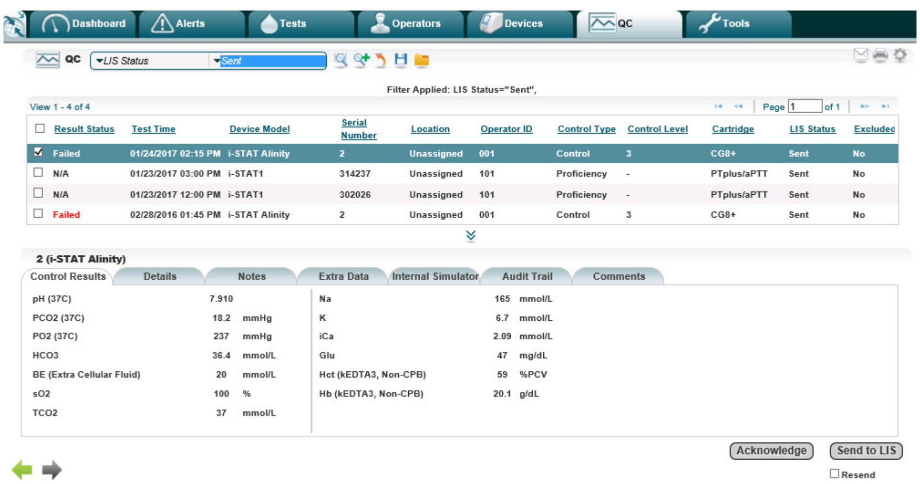
Table 9-5: Methods to send test results to the LIS

Method	Description and behavior
Automatic Send	Info HQ Manager automatically sends QC test results to the LIS based on system configuration settings. Test results are sent as soon as Info HQ Manager receives them.
Manual Send	The Info HQ Manager user selects the test and clicks the **Send to LIS** button.

Follow these steps to send QC test results to the LIS manually:

1. Click the QC tab to display a list of QC test results.

Figure 9-8: List of QC test results



2. Select a test result to send to the LIS by clicking the check box to its left.
3. If a test result is selected, and that test result was previously sent to the LIS, check the **Resend** box to activate the **Send to LIS** button.
4. Click **Send to LIS**.
5. Click **Yes** in the confirmation box.

The selected test results are sent to the LIS. The test results remain in the display. The value in the **LIS Status** column changes to *Pending*. The value then refreshes indicating where the test results are in the process of transferring to the LIS. See the following table for information about the LIS transfer status messages that are displayed in Info HQ Manager.

Table 9-6: LIS status messages

LIS transfer status	Description
Pending	The QC test results are queued for sending to the LIS.
Awaiting Response	The QC test results have been sent, and Info HQ Manager is waiting for an acknowledgement from the LIS to indicate they were received.
Sent	The LIS has indicated that the QC test results have been received and accepted without error.
Rejected	The LIS has received the QC test record, but cannot process it.
Not Sent	The QC test record was not successfully sent manually or automatically.

9.4 Cartridge lot status transfer to i-STAT Alinity

When Cartridge Lot QC feature is enabled, Info HQ Manager transfers cartridge lot status information to i-STAT Alinity devices upon receiving a request from the device.

Table 9-7: Cartridge lot processing directive codes

Status code	Description
USE	Cartridge lot is ready for use in patient testing.
QCO	Cartridge lot is only for QC purposes.
QCV	Cartridge lot is ready for use in patient testing, but an expiration warning could be given. This status is only given when the Periodic QC Criteria is configured.
REJ	Reject when used for patient testing.

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10 - Info HQ Manager system management

This section provides information and procedures for managing and maintaining the Info HQ Manager system. See the *Info HQ Manager Implementation Guide* for system configuration information.

10.1 Check the connection status to the i-STAT/DE software

i-STAT 1 devices are directly managed by the i-STAT/DE web service, which is the communication and customization software for i-STAT 1 devices. To check Info HQ Manager's connection status to i-STAT/DE, follow these steps:

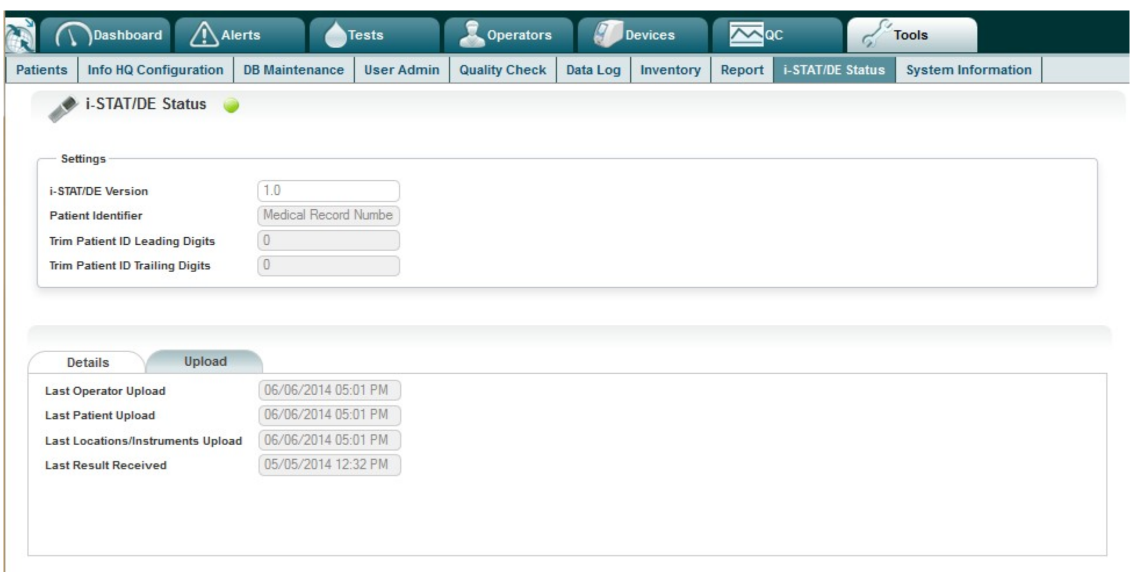
1. Click the Dashboard tab.
2. Click the **i-STAT/DE** text, as shown.

   (The green status indicator shows that the connection is normal.)

Figure 10-1: Information System indicators

The **i-STAT/DE Status** screen opens, with the Details secondary tab selected by default.

Figure 10-2: i-STAT/DE Status screen



General information about the connection to i-STAT/DE is displayed, along with a status indicator located near the top-left of the screen. Green indicates that the connection between Info HQ Manager and i-STAT/DE is working properly. Red indicates that there is an issue with the connection to i-STAT/DE.

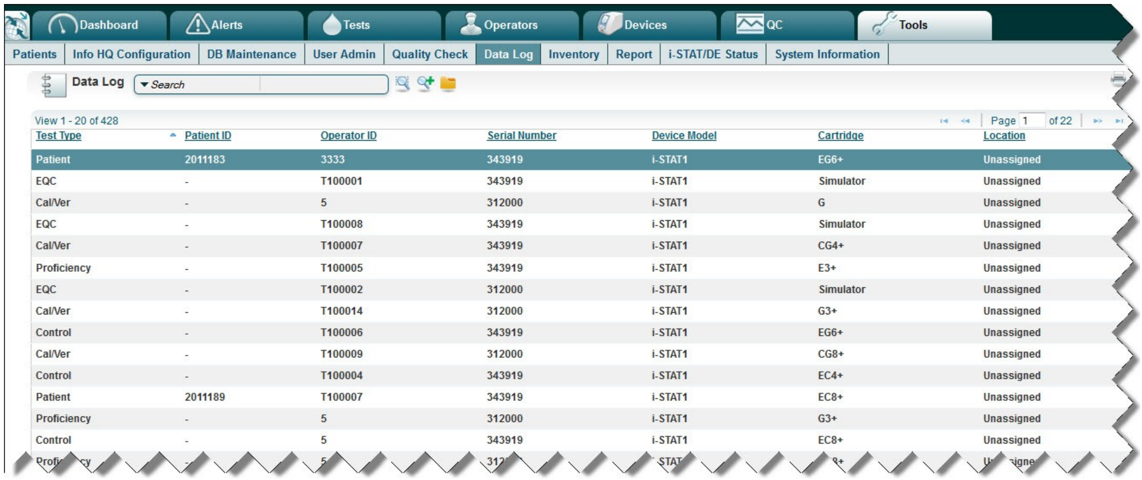
10.2 View the system data log

The system data log keeps records of all types of tests performed on devices and transmitted to Info HQ Manager.

To view the system data log:

1. Click the Tools tab.
2. Click the Data Log secondary tab to display the system data log.

Figure 10-3: Data Log screen



Use the Search options to narrow the list to display just those records based on the search criteria. For example, search by patient name to narrow the list to display only records for that specific patient name.

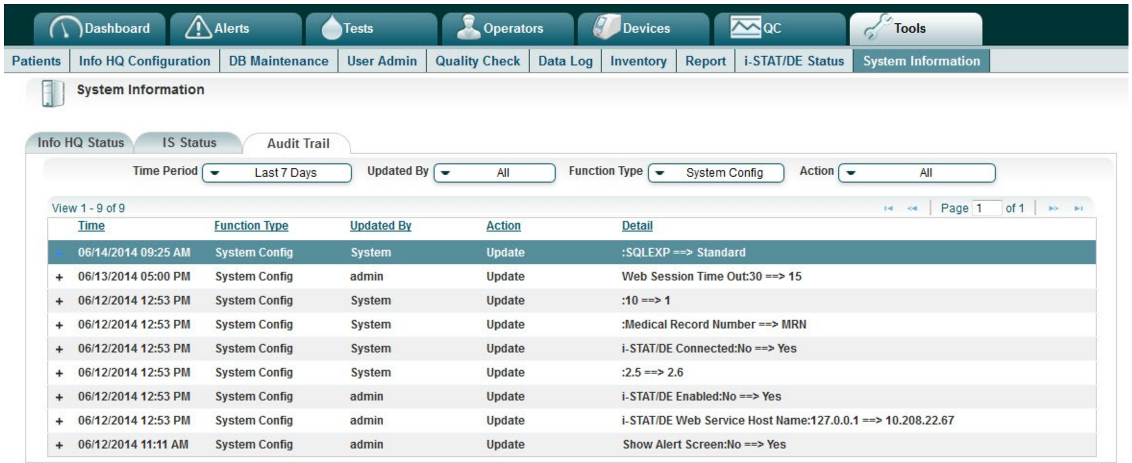
10.3 View the system audit trail

Info HQ Manager keeps an audit trail of all system events and exception errors, including all actions performed by Info HQ Manager users and all changes made by them. These changes include, for example, acknowledgements of test results, changes to operators, and changes to consumables (cartridges and lots). The system audit trail is not affected by the global date or location items.

To view the system audit trail:

1. Click the Tools tab.
2. Click the System Information secondary tab.
   The **System Information** screen opens, with several system-related tabs.
3. Click the Audit Trail tab to display the system audit trail.

Figure 10-4: System Audit Trail



4. Optionally, use filters at the top of the list to facilitate viewing of the audit trail. The list can be filtered in the following ways:

Time Period	List all events or list only events for today, the last 7 days, or the last 30 days.
Updated by	List actions performed by a specific user.
Function Type	List actions related to a specific system function, for example patient tests or database backups.
Action	List only actions of a specific type.

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11 - Reports

Basic reports can be generated from most functional areas of Info HQ Manager. For example, a report of patient test results can be generated from the Test tab. More advanced report generation and viewing, including options for filtering and scheduling reports in advance, is explained in the following sections.

Note: The SQL Server Agent service must be running to use advanced reporting features. Verify with the Info HQ Manager IT team that this system service is running.

11.1 Types of reports

Info HQ Manager provides the following types of reports from the Report page:

Table 11-1: Types of reports available from the Report page

Report	Description	Functional area
Audit Trail	All actions performed by the user or the system.	Audit Trail
Data Log List	Every patient or QC test result transaction captured by Info HQ Manager.	Data Log
Devices List	All devices registered in Info HQ Manager.	Device
Invalid Patient LIS	Patient test results with corrected patient IDs and the LIS status associated with them.	Patient Tests
LIS Failure	Patient test results that were rejected by the LIS, along with corresponding LIS messages.	Patient Tests
LIS Summary	Number and percentage of patient test results with corrected or manually entered patient IDs that were sent to the LIS. The data is organized by testing area.	Patient Tests
Locations	List of the facilities, departments, and areas within the system.	Location Hierarchy
Monthly Summary	Summary information about patient test results, QC test results, alerts, and invalid patient IDs with performance indicators per department.	Summary Report
Monthly Summary by Operator	Summary list of patient test results, QC test results, alerts, and invalid patient IDs, organized by operator.	Summary Report
Operator Certification	Active operators with a certification status of certified and/or expired on specific devices.	Operator
Operator Current Competency Status	All operators’ current competency status for i-STAT Alinity.	Competency Tracker

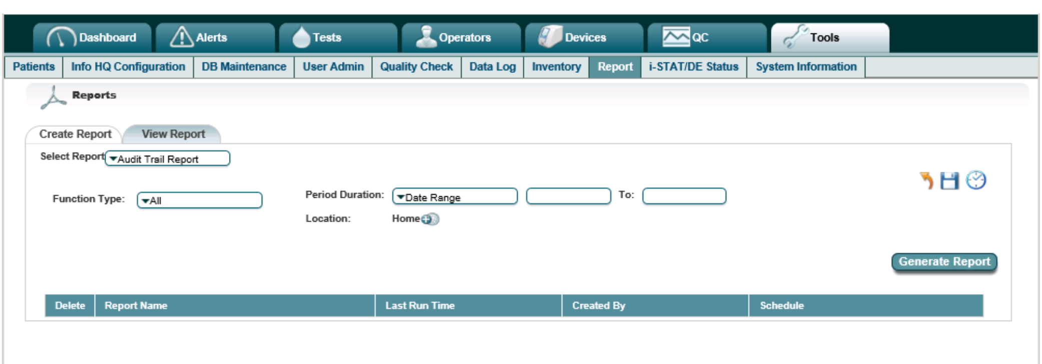
Report	Description	Functional area
Operator History Competency Status	Displays all of the operator competency criteria and status for active operators. Credited criteria are displayed on the top by time in descending order. Uncredited criteria are displayed on the bottom alphabetically.	Competency Tracker
Operator List	All operators in the system.	Operator
Patient List	All patients received from an HIS or EMR system. (Available only if Info HQ Manager is configured to receive ADT data.)	Patient Tests
Patient Test Result List	All patient test results.	Patient Tests
QC Test Result List	All QC tests, liquid and electronic, in a list.	QC
QCC by Location	Summary count of test results and quality check codes for a specified location, over a specified span of time.	Quality Check Code
QCC by Location and Operator	Summary count of test results and quality check codes by operator and location, over a specified span of time.	Quality Check Code
Quality Check List	All occurrences of a specified quality check code.	Quality Check Code
Reagent Cartridge Lot Inventory	Cartridge lot consumption and inventory summary report.	Inventory
Reagent Usage	Summary count of cartridges, test results, and quality check codes by cartridge type.	Summary Report

11.2 Generate reports

Follow these steps to generate a report using advanced filtering options:

1. Click the Tools tab.
2. Click the Report secondary tab.
   The **Reports** screen opens. The Create Report tab is selected by default.

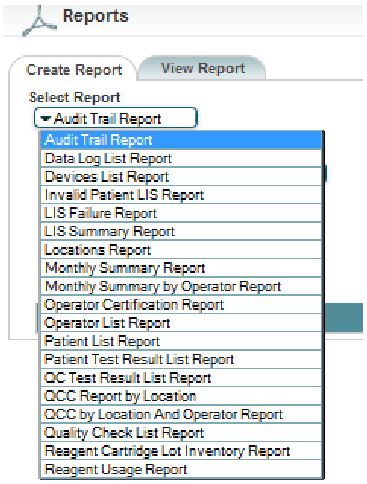
Figure 11-1: Reports screen with Create Report tab



3. In the **Select Report** field, select the type of report from the drop-down list.

   Refer to *Types of reports* for a description of each report.

Figure 11-2: Select Report drop-down list

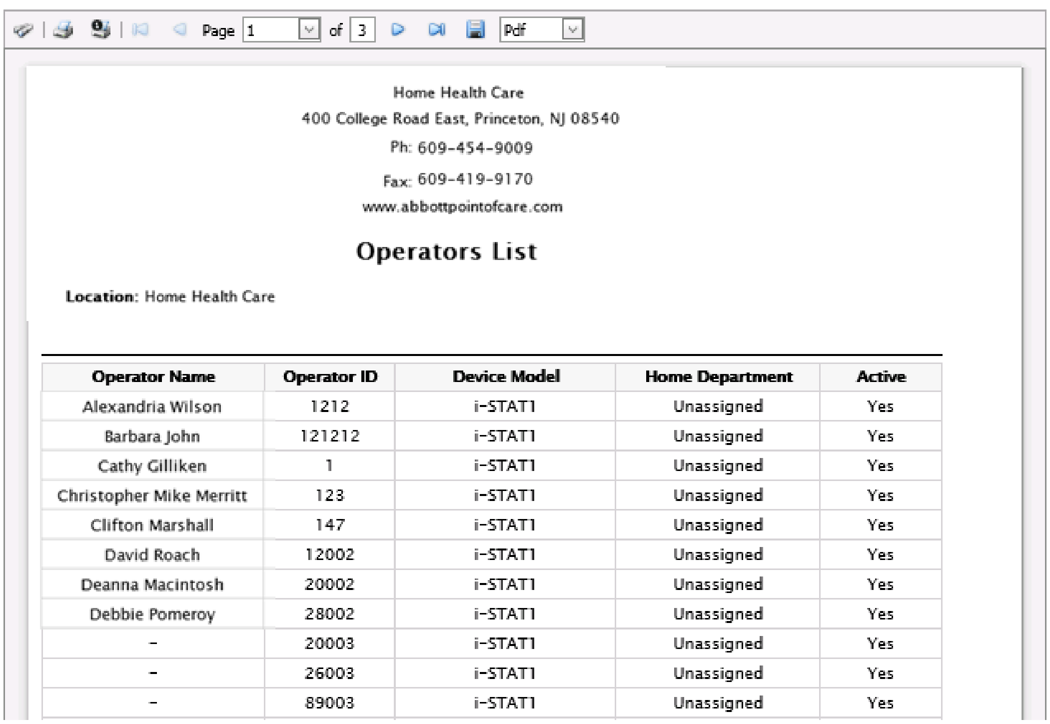


   The screen updates and displays fields and filters for the report. The fields and filters that are presented vary, based on the report type that is selected.

4. Complete the fields and filters for the selected report type.
5. Click **Generate Report**.

   The report opens in a browser window, as shown.

Figure 11-3: Example: Operators List Report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Home Health Care
400 College Road East, Princeton, NJ 08540
Ph: 609-454-9009
Fax: 609-419-9170
www.abbottpointofcare.com

Operators List

Location: Home Health Care

Operator Name	Operator ID	Device Model	Home Department	Active
Alexandria Wilson	1212	i-STAT1	Unassigned	Yes
Barbara John	121212	i-STAT1	Unassigned	Yes
Cathy Gilliken	1	i-STAT1	Unassigned	Yes
Christopher Mike Merritt	123	i-STAT1	Unassigned	Yes
Clifton Marshall	147	i-STAT1	Unassigned	Yes
David Roach	12002	i-STAT1	Unassigned	Yes
Deanna Macintosh	20002	i-STAT1	Unassigned	Yes
Debbie Pomeroy	28002	i-STAT1	Unassigned	Yes
-	20003	i-STAT1	Unassigned	Yes
-	26003	i-STAT1	Unassigned	Yes
-	89003	i-STAT1	Unassigned	Yes

   In this example, the location is set to *Home Health Care*.

   Note: Reports are displayed in a separate browser window from the Info HQ Manager user interface.

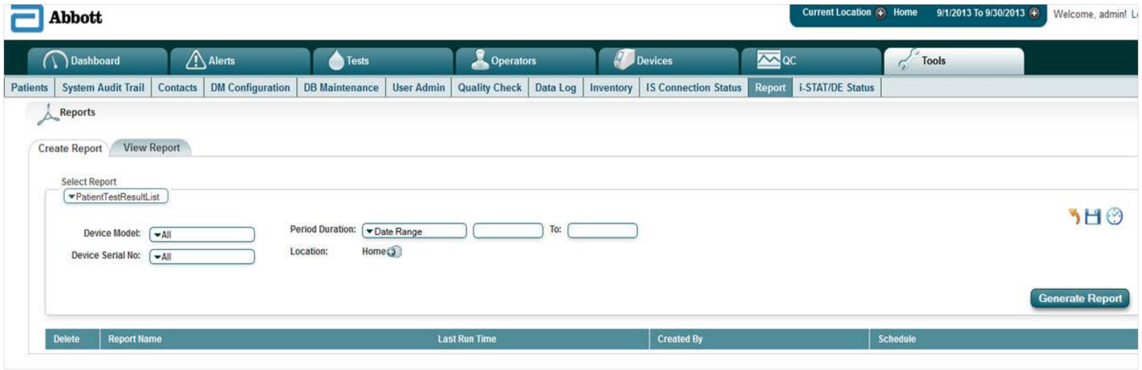
6. Use the controls at the top of the report to scroll through the report, print it, and save it to a file (PDF is the default format). When finished, close the browser window.

11.3 Create a report schedule

Reports can be automatically generated using a report schedule. A report schedule specifies the day, time, and frequency that a report is to be automatically generated. Multiple report schedules can exist, each having different criteria for a report. A report schedule can be a one-time occurrence or it can be a recurring event. Perform the following steps to create a report schedule:

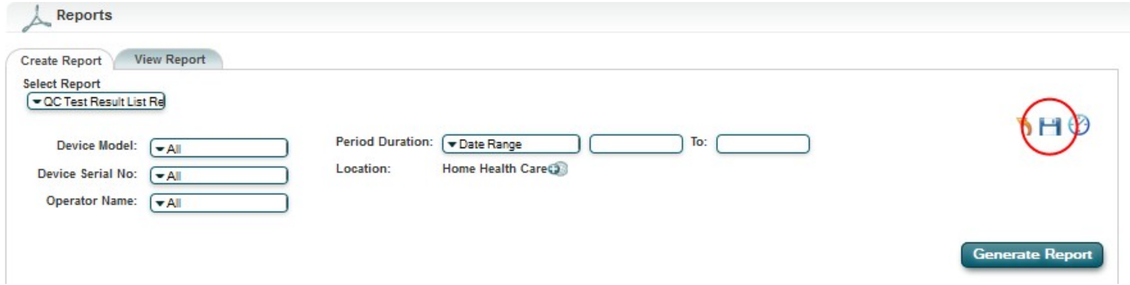
1. Click the Tools tab.
2. Click the Report secondary tab.
   The **Reports** screen opens. The Create Report tab is selected by default.

Figure 11-4: Reports screen with Create Report tab



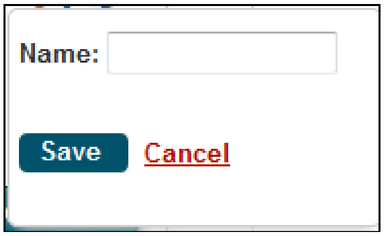
3. In the **Select Report** field, select the type of report from the drop-down list.
4. Complete the fields and filters for the selected report type.
5. Click to the right of the fields on the screen, as shown.

Figure 11-5: Create Report tab: Location of the Save icon



A pop-up opens, for saving the report schedule.

Figure 11-6: Pop-up for saving the report template for scheduling

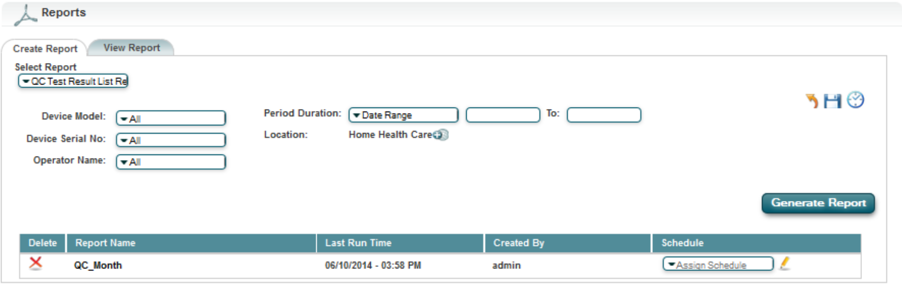


6. Enter a name to assign this report schedule.

   Choose a name that will be helpful to identify this report *schedule*. It is not the same as the report type.
7. Click **Save**.
8. Click **OK** in the confirmation box.

The saved report schedule is displayed in the lower half of the **Reports** screen, along with other report schedules that were created previously (if any).

Figure 11-7: Create Report tab showing saved report templates for scheduling



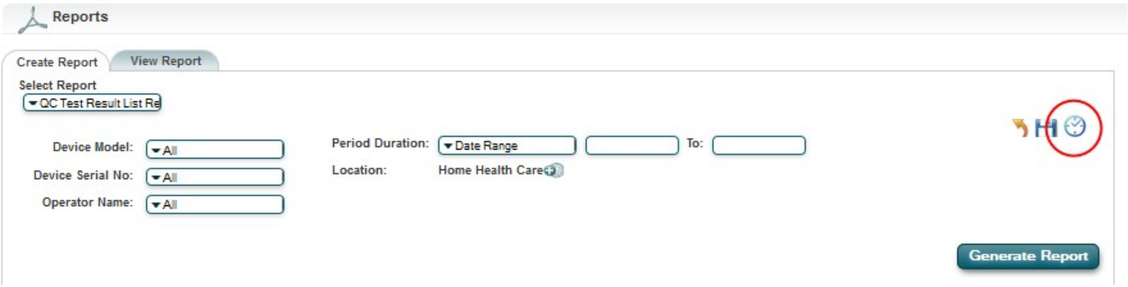
9. The next step is to assign a schedule to the newly created report.

   Assigning the schedule specifies when and how often the report is to be generated. An existing schedule can be assigned, or a new schedule can be created then assigned to this report.

   - To assign an existing schedule, proceed to Step *15*.
   - To create a new schedule, continue to Step *10*.

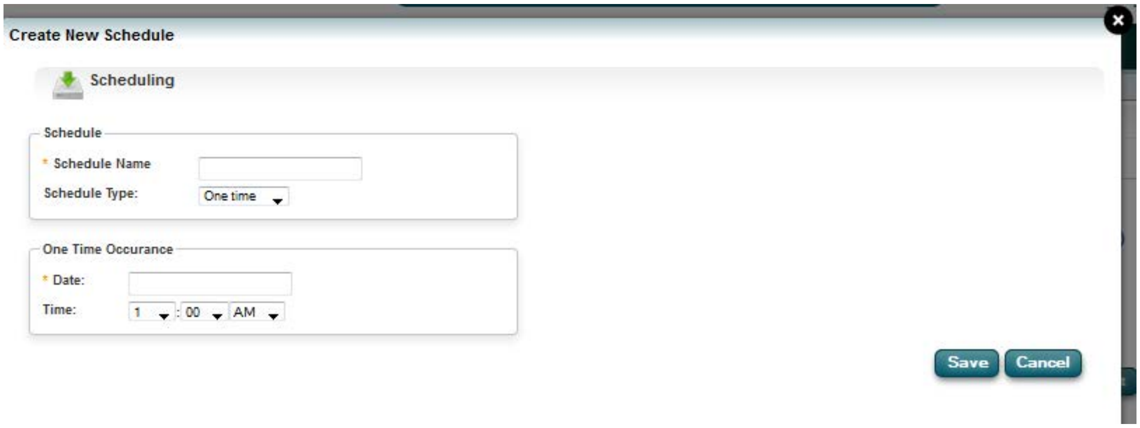
10. Click to the right of the fields on the screen, as shown.

Figure 11-8: Create Report tab: Location of the Create New Schedule icon



The **Create New Schedule** dialog box opens.

Figure 11-9: Create New Schedule dialog box

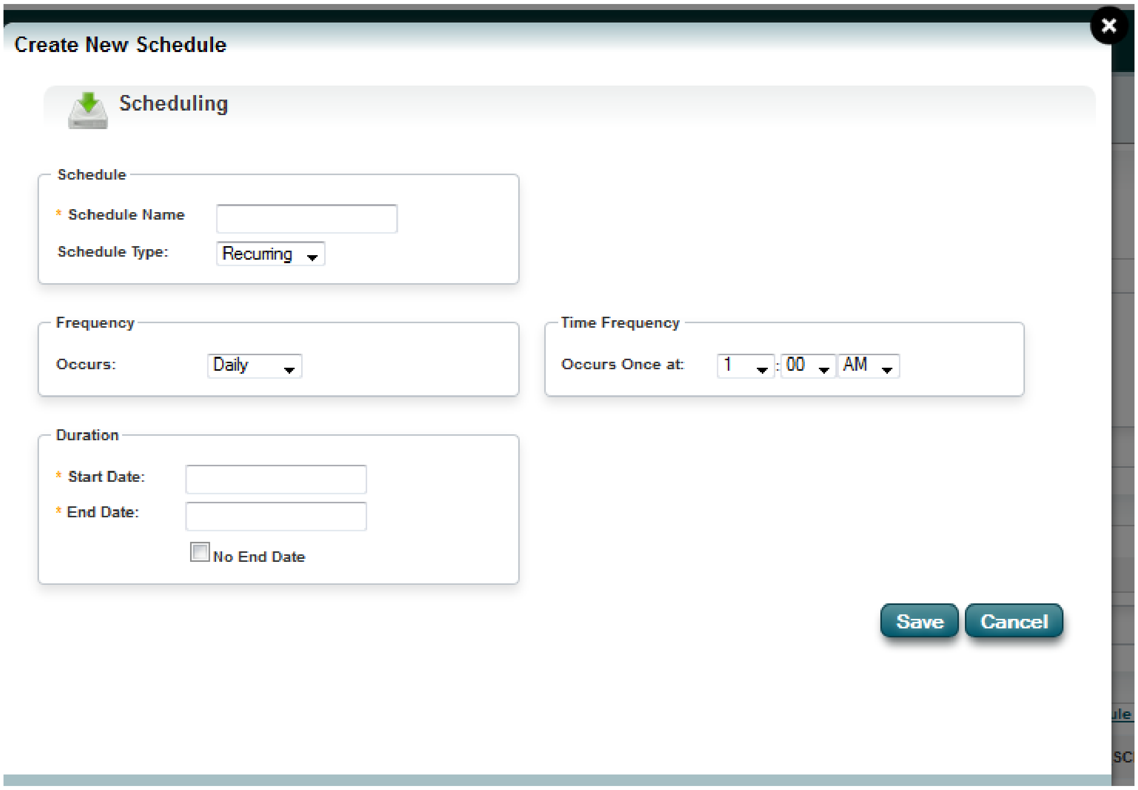


11. In the **Schedule Type** field, select one of the following:

    - One time — Generates the report one time.

- Recurring — Generates the report on a recurring basis. When this option is selected, the dialog box updates with varying fields, as shown.

Figure 11-10: Create New Schedule for recurring event



12. Complete the remaining fields. If *Recurring* was selected in Step 11, note the following:

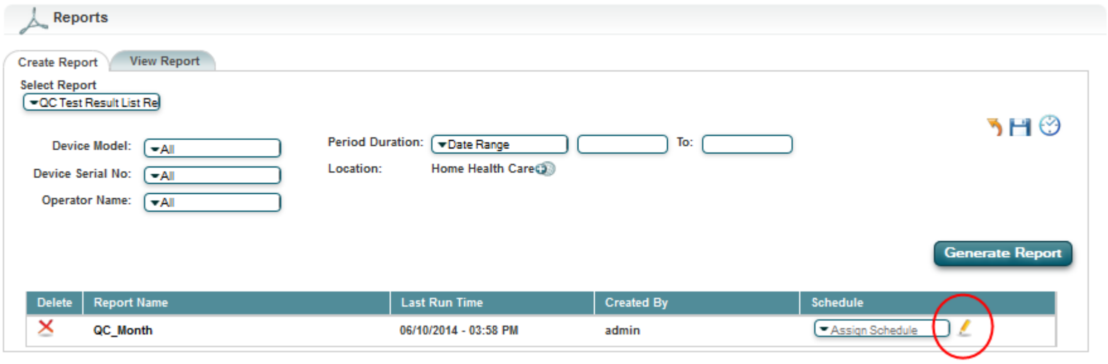
- Enter information for the Schedule, Frequency, Daily/Weekly/Monthly Frequency, and Duration fields.
- In the Duration field, use the calendar widget to enter the date the reporting schedule is to take effect, followed by the date the reporting schedule is to no longer run. Click the No End Date box if the reporting schedule is to run indefinitely.

13. Click **Save**.

14. Click **OK** in the confirmation box.
Info HQ Manager creates the schedule and makes it available from the **Assign Schedule** drop-down list that will be used in Step 16.

15. Click next to the newly created report.

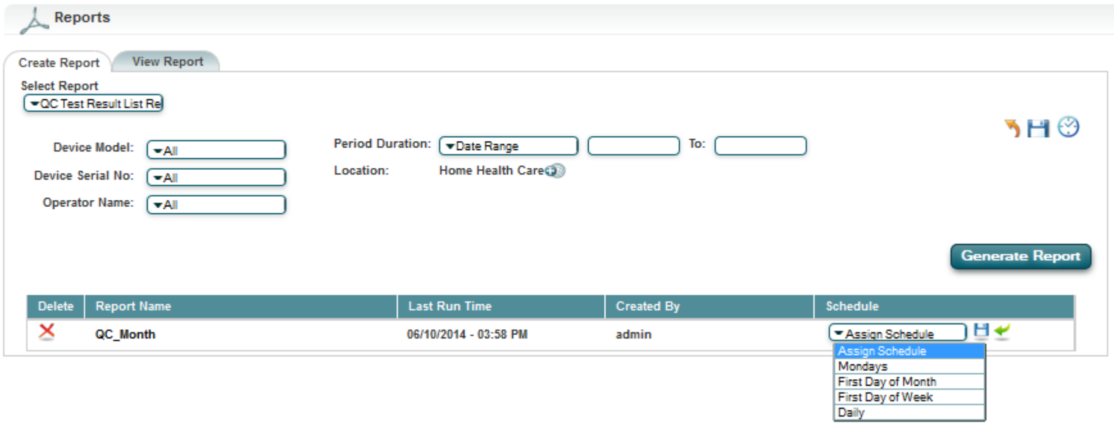
Figure 11-11: Create Report tab: Location of the Edit icon



16. Click the **Assign Schedule** drop-down list and select the schedule to be assigned.

If a new schedule was created (Steps *10* through *14*), it appears in this drop-down list and can be selected.

Figure 11-12: Create Report tab: Drop-down list for assigning a schedule



17. Click to the right of the **Assign Schedule** field, or

18. Click **OK** in the confirmation box.

The schedule is assigned and the report will be generated automatically, based on the time and frequency specified in the schedule.

If a saved report is not available on the Create Report tab it might be available in the View Report tab, or users might have to select the specific report type from the **Select Report** drop-down list.

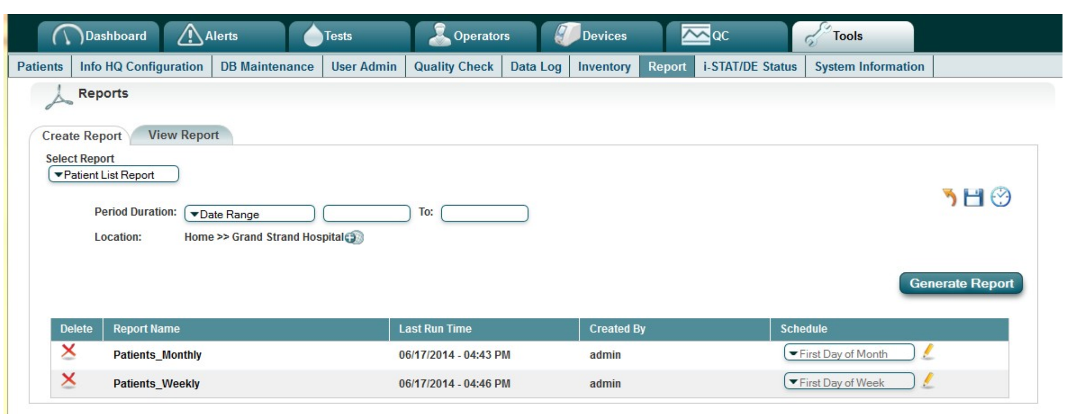
11.4 Delete a scheduled report

Reports can be deleted when they are no longer required. This might be the case due to changes in reporting criteria, duplicate reports, or simply basic housekeeping.

Follow these steps to delete a report schedule:

1. Click the Tools tab.
2. Click the Report secondary tab.
   The **Reports** screen opens. By default, the Create Report tab is displayed and lists the previously created report schedules displayed in the lower half of the screen.
3. In the **Select Report** drop-down, select a report type.
   A list displays at the bottom of the screen, showing all saved reports for the selected report type.

Figure 11-13: Create Report tab: List of saved report templates for scheduling



4. Click next to the name of the report to be deleted.

5. Click **OK** in the confirmation box.
All scheduled instances of the report are deleted.

11.5 View reports

The View Report tab displays a list of all report schedules that were created (using the Create Report tab), including report schedules that have not yet executed. This list of reports can grow over time, so use the **Function**, **User**, and **View Name** filtering options to narrow the list of reports displayed.

The View Report tab displays the following information for each report schedule:

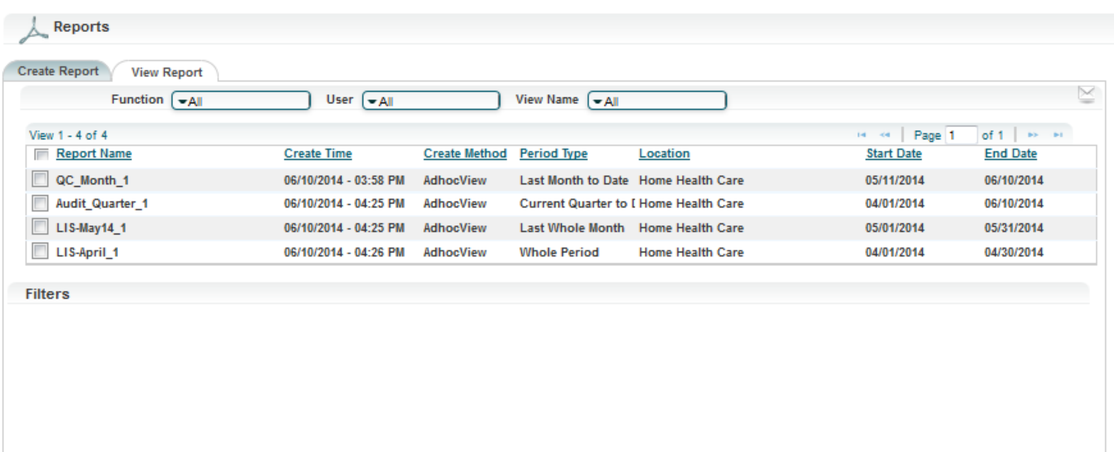
Table 11-2: Information in the View Report tab

Column	Description
Report Name	Name of the report that was created using the Create Report tab. The number at the end of the report name indicates the number of times the report has been generated.
Create Time	Date and time when the report was created.
Create Method	Method used to create the report.
Period Type	Defined time period specified for the report.
Location	Defined location specified for the report.
Start Date	Start date defined for the report.
End Date	End date defined for the report.

To view a report that has run, perform the following:

1. If necessary, display the **Reports** screen:
   a) Click the Tools tab.
   b) Click the Report secondary tab.
2. Click the View Report tab.
   Info HQ Manager displays a list of reports created as a result of report schedules that ran. Use the **Function**, **User**, and **View Name** drop-down lists to filter the list to find the desired report more easily.

Figure 11-14: View Report tab: List of scheduled reports that were created



3. Double-click the name of a report to open the report in a browser window.

Note: Reports are displayed in a separate browser window from the Info HQ Manager user interface.

4. Use the controls at the top of the report to scroll through the report, print it, and save it to a file (PDF is the default format).

   When finished, close the browser window.

11.6 Email reports

Info HQ Manager can send a report to an individual as an attachment. To email a report, perform these steps:

1. Click the Tools tab.
2. Click the Report secondary tab.
3. Click the View Report tab to display a list of all reports.
4. Check the report that is to be sent.
5. Click .
   The **Send Email** dialog box opens, with the selected report attached.
6. In the **To** box, enter one or more email addresses to receive the email, separated by semicolons.
7. Optionally, enter text in the **Subject** and **Content** boxes.
8. Click **Send** to send the email.
   An information box indicates that the email message has been submitted to the email server's queue for outbound email.
9. Click **OK**.

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12 - Technical support

Abbott Point of Care and its distributors are committed to helping you resolve problems with Abbott Point of Care software, hardware, or testing equipment. For technical assistance within the United States, please call Technical Services at 800-366-8020 toll free. Outside the U.S., please contact your local i-STAT distributor.

Information needed

Please have the following pertinent information available for review with the technical support representative:

- Description of problem
- When problem first occurred and what has been done so far to resolve the problem
- Serial number of the system or component(s)
- Displayed message and code number
- Frequency of the problem
- Software version
- System and/or environmental conditions (such as OS, VM, or physical server for example)
- Remote access information, if appropriate

Limitation of service

A technical support specialist may be able to assist in restoring the backup file if the file is available and in good condition (that is, not corrupted). In the event that a database backup is not available, additional time and resources will be needed to recover the Info HQ Manager system. Each backup replaces the previous one.

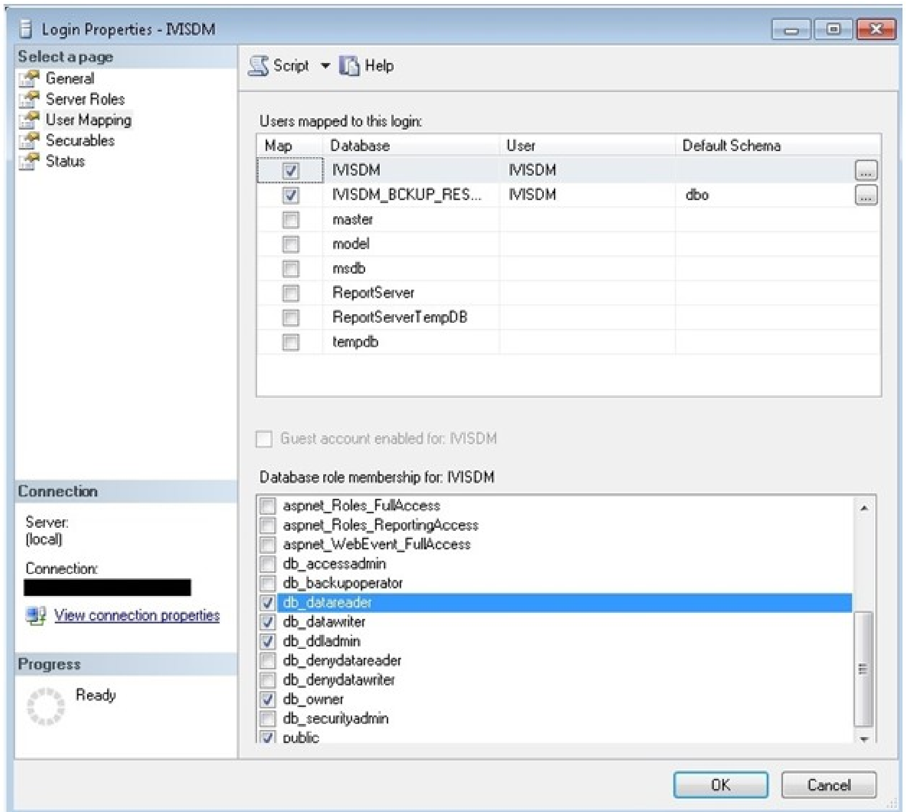
Backup or restore job times depend on the size of the database. Jobs can take just a few minutes but have been known to take as long as 30 minutes or more.

Requirements checklist

When troubleshooting problems, ensure that the system meets all of the following requirements:

- LIS outbound port and HIS listening point
- 20Mbps network bandwidth
- Java Scripting enabled
- Info HQ Manager IP address as proxy exception
- DE IP address as proxy exception
- User has admin privileges to install Info HQ Manager
- IIS installed
- SQL installed
- .NET installed
- Browser supported for the i-STAT/DE configuration installed. See the Info HQ Manager Specification sheet for a list of configurations and supported browsers.
- For database backup and restore, both IVISDM and IVISDM_BACKUP_RESTORE must have the following access levels and permissions:
    - db_datareader
    - db_datawriter
    - db_ddladmin
    - db_owner
    - executor
    - Public

Figure 12-1: Example of permissions (shown for IVISDM)



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