RENALSOFT

Software

Reference Guide

Baxter

The purpose of this reference guide is to provide you guidance on some basic and advanced functions in the RenalSoft Software.

Table of Contents
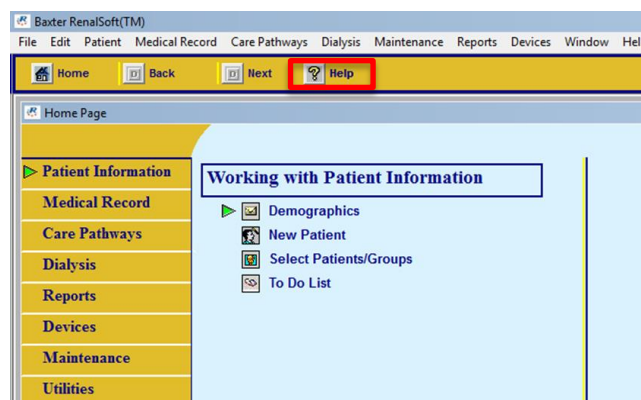
Basic Features

Advanced Features

Navigate Help

The Help feature provides detailed descriptions of the RenalSoft Software components.

Step 1: Access Help

- On the Home page, click the **Help** button on the tool bar at the top of the screen.
  Note: There are three ways to search for the help content, which is through the **Contents** tab, **Index** tab, and the **Search** tab.

Search for Help via the Contents Tab

- Click the **plus** sign icon next to a relevant topic on the **Contents** tab to view the sub-topics.

- Click the **plus** sign icon next to a sub-topic to view the list of topics.

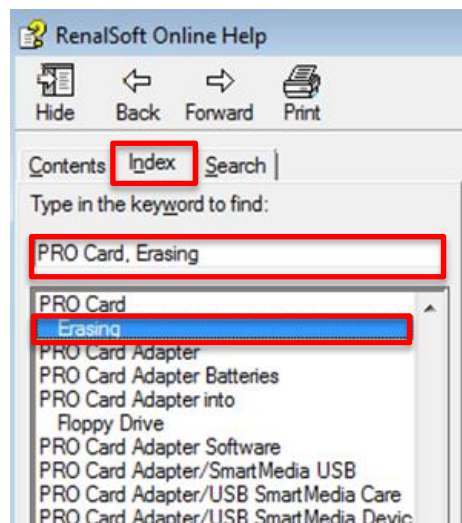- Click a relevant topic to view the specific help topic.
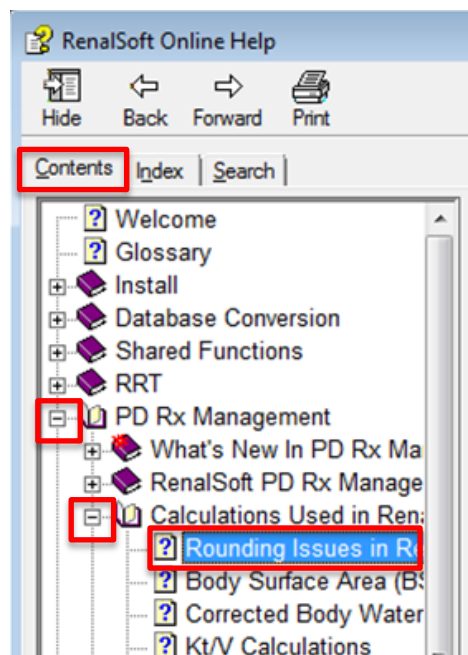
Search for Help via the Index Tab

- Click the **Index** tab.

- Enter the relevant keyword, for example, *PRO,* in the **Keyword** field. The list of topics displays.

- Click the topic name to view the specific help topic.

Search for Help via the Search Tab

- Click the **Search** tab.

- Enter the keyword, for example, *Erase PRO Card,* in the **Keyword** field.

- Click the **List Topics** button to view related topics.

- Click the relevant topic to view it.
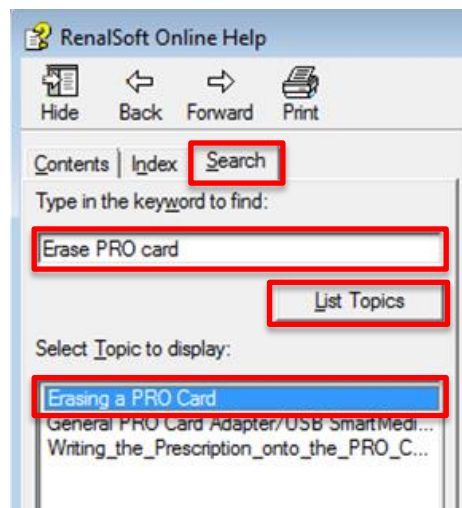
For more information about navigating help, refer to the following Help sections in the RenalSoft Software:

Shared Functions → Using Online Help → Help Organization

Administration – Set Up Favorites

Favorites offer shortcuts to frequently used features and information. There are three sections within Favorites: My Favorites, My Reports, and My Patient Groups.

Step 1: Set Up My Favorites

- Locate the feature to add to your favorites.

- Right-click the feature name. A pop-up displays.

- Click **Add to Favorites** in the pop-up.

- Confirm the feature has been added to the **My Favorites** window.
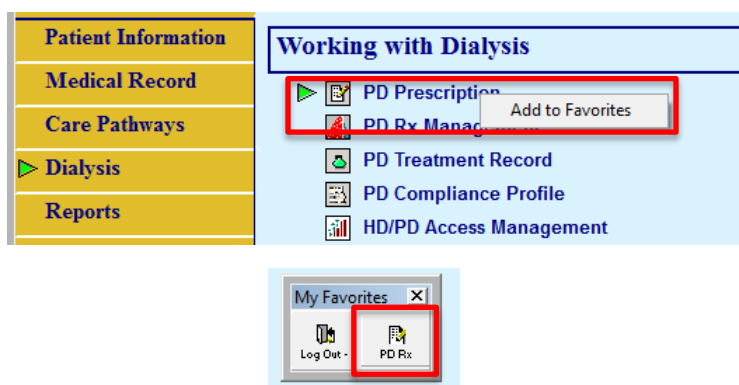
Step 2: Set Up My Reports

- Click **Reports** in the left Navigation menu. The **Working with Reports** menu displays.

- In the **Working with Reports** menu, click the **plus** and **minus** signs besides each folder to expand or collapse the folders and locate the desired report.

- Right-click the Report name. A pop-up window displays.

- Click **Add to Favorites** in the pop-up window.

- Confirm that the feature has been added to the **My Reports** window.
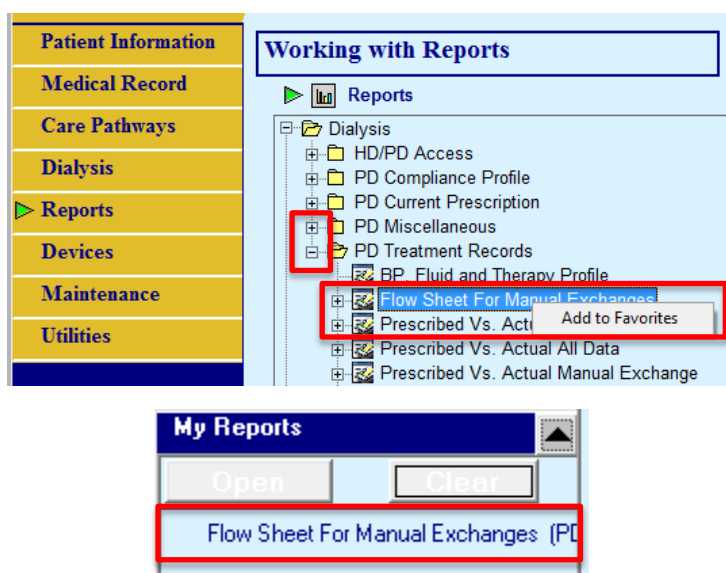
Step 3: Set Up My Patient Groups

My Patient Groups allows you to quickly locate patients.

- Locate the **My Patient Groups** window on the Home Page and click the down arrow. The **My Patient Groups** window expands.

- Right-click an unassigned patient group icon. A pop-up window displays.

- Click **Assign Group** in the pop-up window. The **Patient Groups** pop-up window appears.

- Select the desired Patient Group from the **Patient Groups** pop-up window.

- The selected group displays in the **My Patient Groups** window.

- Right-click the group and select the **View Patient List** option to view the list of patients in the group. Selecting a patient from the list puts that patient in context in the RenalSoft Software.
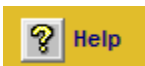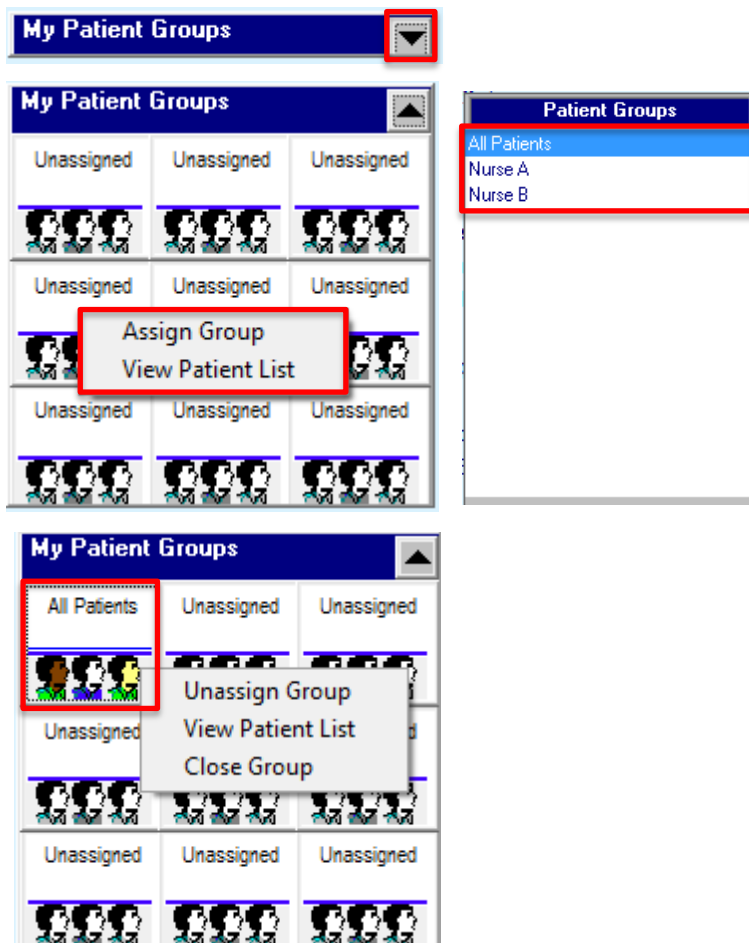
For more information about setting up favorites, refer to the following Help sections in the RenalSoft Software:

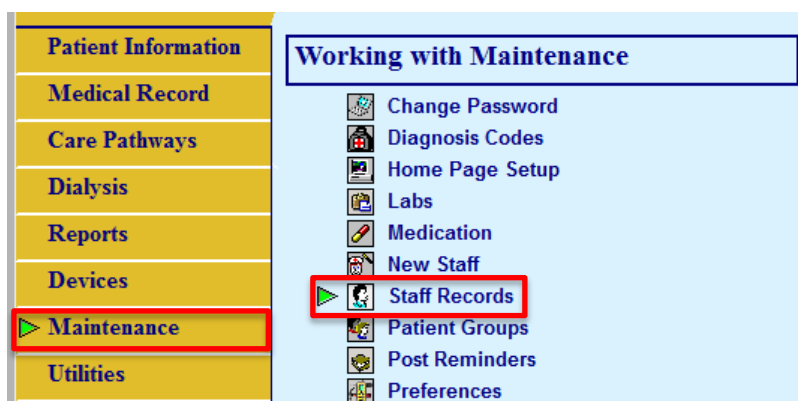User Guide → General → Home Page Orientation

Administration – Manage/Edit Staff

Step 1: Access Staff Record

- Click **Maintenance** in the left Navigation menu. The **Working with Maintenance** menu displays.

- Click **Staff Records** in the **Working with Maintenance** menu. The **Staff Records** screen displays.

Step 2: Edit Address (optional)

- On the **Staff Records** screen, click the **Address** tab.

- Modify the address, as required.

- Click the **Save** button.
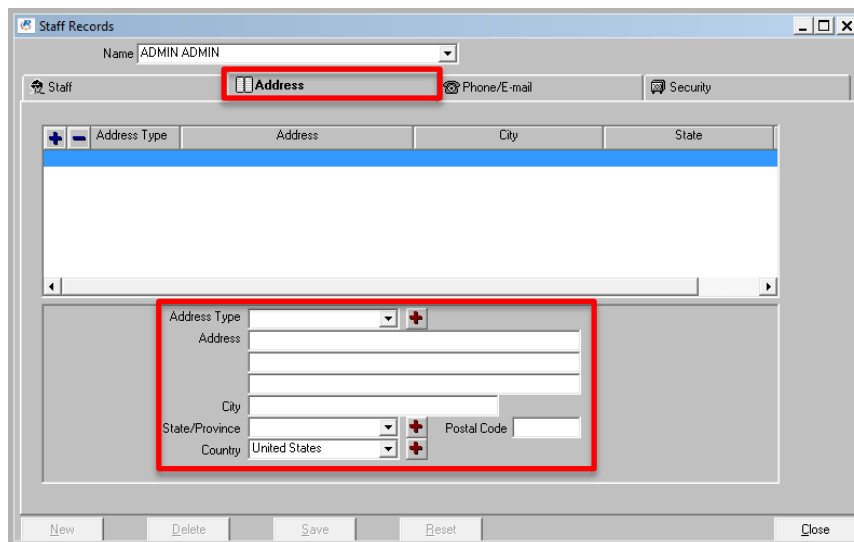
(!) Quick Tip   Custom values can be added to any drop-down list by clicking the ✚ button next to the drop-down. This displays **Select Lists Maintenance** window, where by clicking the **New** button you can enter a customer value. Remember to click the **Save** button to commit the changes.

Step 3: Edit Phone/Email (optional)

- On the **Staff Records** screen, click the **Phone/E-mail** tab.

- Modify the phone and email details, as required.

- Click the **Save** button.

Step 4: Edit Security Details

- On the **Staff Record**s screen, click the **Security** tab.

- Modify the security details, as required.

- Click the **Save** button.

For more information about editing staff information, refer to the following Help sections in the RenalSoft Software:

Shared Functions → Administrator Only Functions → Staff Information → Staff Records → Add/Modify/Delete Staff Records

PD Treatment Record

PD Treatment Record is an important report/document showing the report of treatment on a daily basis. There are three main tabs in the PD Treatment Folder: Therapy Summary Tab, Messages Tab, and the Reports Tab.

Step 1: Access PD Treatment Record

- Click **Dialysis** in the left Navigation menu. The **Working with Dialysis** menu displays.

- Click **PD Treatment Record** in the **Working with Dialysis** menu.
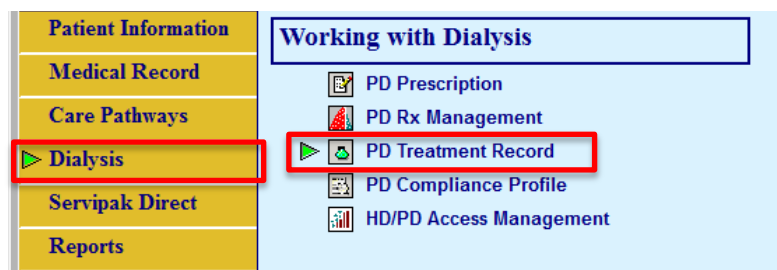
Step 2: Select Patient

- Click the **Name** drop-down list to look for and select a patient.

- If the desired patient cannot be found in the drop-down list, click the folder icon next to the drop-down field to search for the patient.
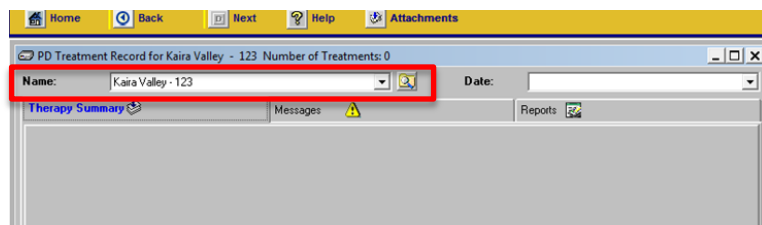
Step 3: Review Therapy Summary

Therapy Summary Tab

- The most recent Therapy Summary displays.

- The view defaults to the **Therapy Parameters** sub-tab, which compares the prescribed treatment parameters with the actual treatment parameters.

- To view historic treatment summaries, click the **Date** drop-down.

- Discrepancies between what was prescribed and the Actual therapy administered will appear highlighted in Yellow.

- Click the **Therapy Details** sub-tab to view the actual treatment details on a cycle-by-cycle basis.

- To view the Therapy Details, click Night or Day, if available, otherwise continue.

Step 3: Review Therapy Summary (continued)

- Click the **Optional Manual Exchange Info** sub-tab to enter the required parameters for manual exchanges.

- Click the **Additional Rx Information** sub-tab to view pre and post therapy lab information, as well as the Machine Serial Number.

Step 4: Review Device Messages

- The Message tab displays any alarms received during the treatments.

- Enter **Start** and **End** dates, and then click the **Display** button to view messages for a specific date range.

- The Messages Displayed can be viewed by

  – All

  – Therapy Related (such as Caution: Neg UF, Fill/Drain Not Finished, Low Drain Volume, Therapy Aborted), or by

  – Specific Type of message.
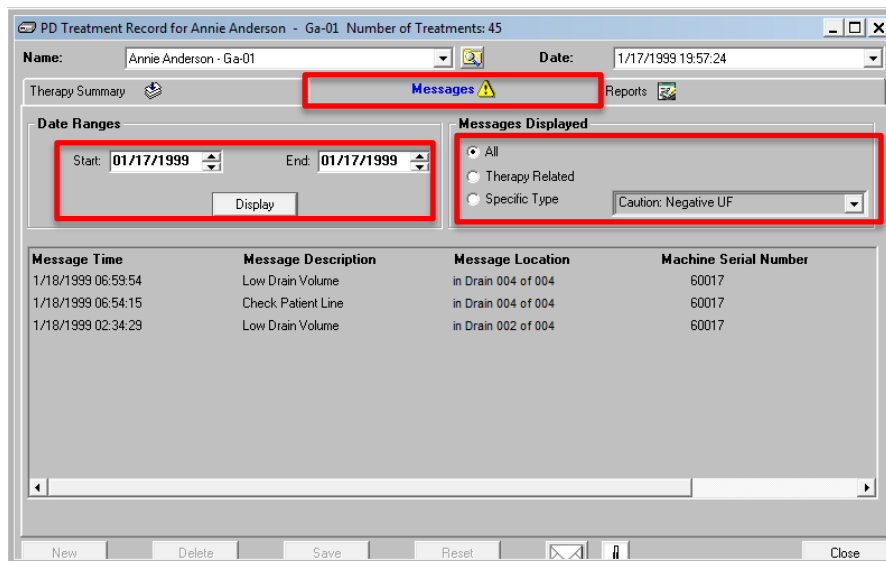
  For more information about PD Treatment Record, refer to the following Help sections in the RenalSoft Software:
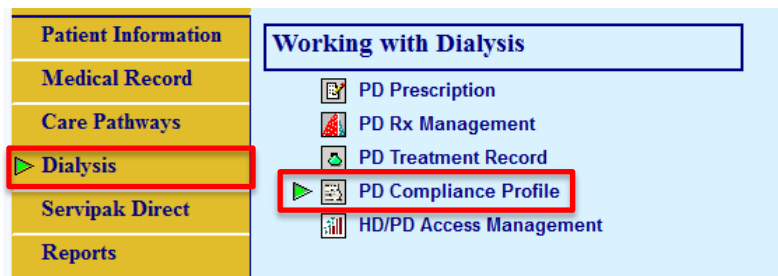
PD → PD Results Folder

PD Compliance Profile

The PD Compliance Profile provides a snapshot of patient treatments over a period of time.
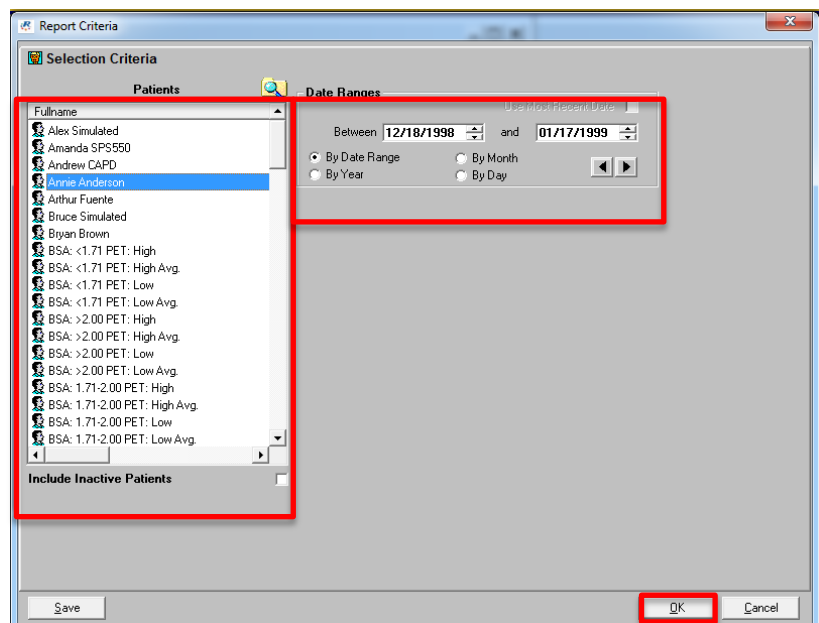
Step 1: Navigate to PD Compliance Profile

- Click **Dialysis** in the left Navigation menu. The **Working with Dialysis** menu displays.
- Click **PD Compliance Profile** in the **Working with Dialysis** menu. The **Report Criteria** window displays.

Step 2: Select Report Criteria

- Select desired Patient or Patient Group.
- Specify the desired **Date Range**.
- Click the **OK** button.

Step 3: Review Compliance Profile

- Review **Compliance Calendar**.

- If desired, select one or more reports to view or print.

- To view a different patient, click the **Reselect** button.

 For more information about PD Compliance Profile, refer to the following Help sections in the RenalSoft Software:

PD → PD Compliance Profile folder

PD Rx Management

This section is used to calculate, model, and predict the adequacy of different PD therapy regimens. This will aid you in selecting the best PD prescription for the patient.

Step 1: Navigate to PD Rx Management

- Click **Dialysis** in the left Navigation menu. The **Working with Dialysis** menu displays.

- Click **PD Rx Management** in the **Working with Dialysis** menu. The **RenalSoft PD Rx Management** window displays.
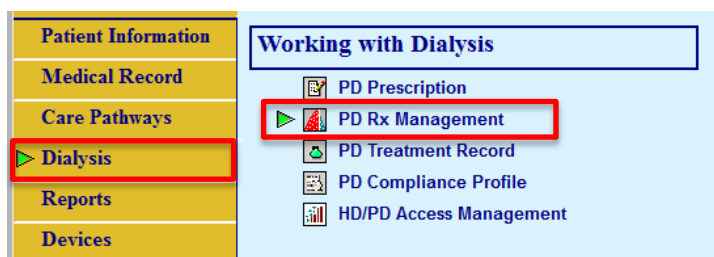
Step 2: Select Patient

- In the **Patient** section, locate the desired record.

- Click the record to select it. Note that a collection record exists in the **Collection** section.

- To only display Active patients in the list, select the **View PDRxMgt Active Patients** checkbox.
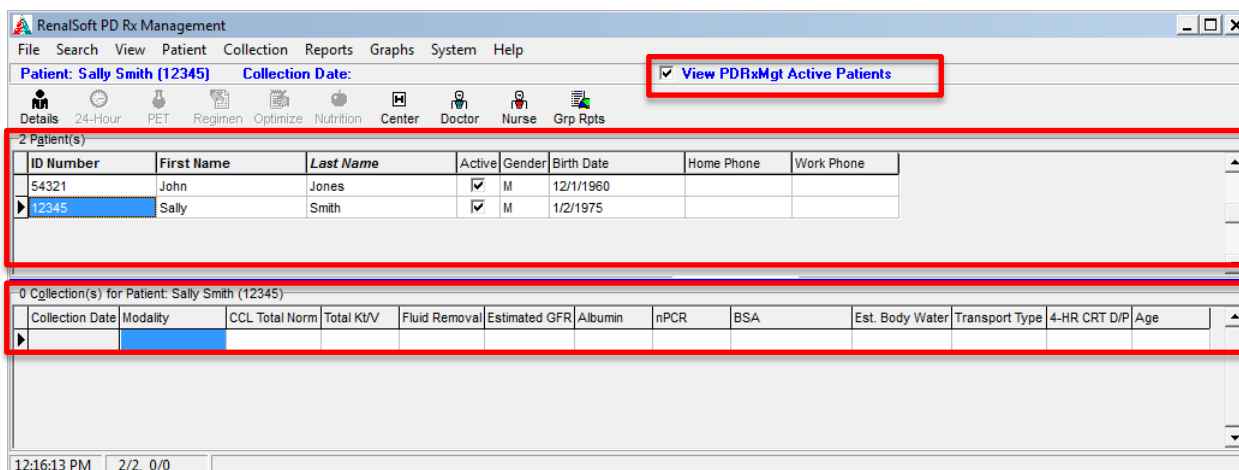
Step 3: Enter Lab Values

- Click the **Collection** menu and select the **New Collection…** option. The **New Collection** window displays.

- Type the date of collection, or accept the current date in the **Collection Date** field.

- Complete the optional fields on the **New Collection** window, as desired.

- Click the **OK** button to save the changes. The **24-Hour Collection** window displays.

Step 4: Enter 24-Hour Collection Information

Note: Required fields on this window are noted in blue.

- Enter relevant values in the **Serum Concentration** section.

- Enter relevant values in the **24-Hours Dialysate Collection** section.

- Click the **Calculate** button to populate the values in the Calculated Values section.

- Click the **OK** button to save changes and close the window.

For more information about importing setting up 24-Hour Collection, refer to the following Help sections in the RenalSoft Software:

PD Rx Management → Collection Record Tasks → Creating a New 24-Hour Collection Record

Step 5: Enter PET Information

- Click the **Collection** menu and select the **PET…** option. The **PET** window displays.

- Enter the following PET information:

    - Enter the PET Date.

    - Enter Overnight Exchange values.

    - Enter Four Hour Equilibration values.

    - Enter Data values.

    - Add the Correction Factor.

    - Check Typical Values to use 1.0 in the Fluid Absorption (mL/min) and 10% in the Residual Dialysate Volume (mLs).

- Click **Calculate** to calculate the Fluid Absorption and Residual Dialysate Volume fields.

    - Click the **Fluid Absorption…** button to view the calculation details.

- Click **OK** to save the record.

 For more information about importing setting up PET records, refer to the following Help sections in the RenalSoft Software:

PD Rx Management → PET-related Tasks → Adding a PET Record

 WARNING! *RenalSoft* **PD Rx Management** requires accurate data for the overnight and four-hour drain volumes and dwell times. The data must be entered into the PET window very carefully from the test results. These values are extremely important since they provide the information used to calculate accurate predictions of patient clearance and ultrafiltration for various dialysis regimens.

Step 6: Model Treatment

- Click the [Regimen] menu icon. The **Regimen Data** window displays.

- Click the desired regimen type in the **Create New Regimens** section.

NOTE: If an existing prescription is imported by clicking the **Import from PD Prescriptions…** button in the Regimen Data window, the Current Rx checkbox will be checked in the Regimen Details window.

- The selected **Regimen Details** window displays.

- Enter the information for the desired regimen.

- Click the **Continue** button. The **Regimen Predictions** window displays.

- The newly created regimen displays along with other previously created regimen predictions.

- Click the **Save** button to save the prediction.

Step 6: Model Treatment (continued)

- Click the **Print Details** or **Print Summary** buttons to print the respective report.

- A preview of the report displays in a new window.

- Click the **Print** button to print the report.

- Click the **Close** button to close the report and return to **Regimen Predictions** window.

Help

For more information about importing setting up PET records, refer to the following Help sections in the RenalSoft Software:
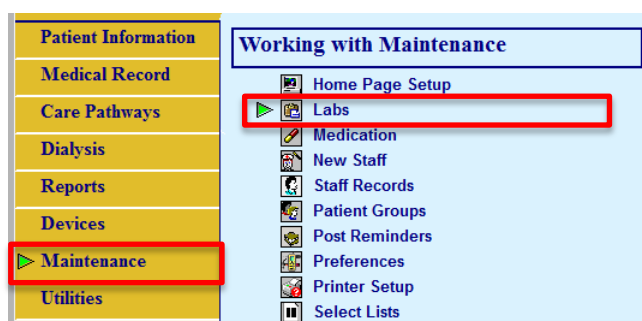
PD Rx Management → Regimen Tasks

HD/PD Access Management – Lab Set Up

HD/PD Access Management helps you to track the creation of an access, infections, hospitalizations, details, assessments and medications related to an access.
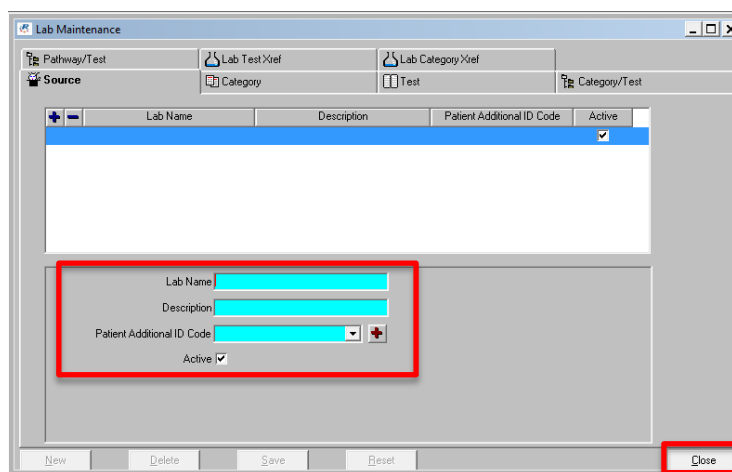
Step 1: Navigate to Labs

- Click **Maintenance** in the left Navigation menu. The **Working with Maintenance** menu displays.

- Click **Labs** in the **Working with Maintenance** menu.

Step 2: Set up Labs

The **Lab Maintenance** window displays.

- On the **Source** tab, type Test Lab in the **Lab Name** and **Description** fields.

- Select the relevant patient ID code from the **Patient Additional ID Code** drop-down list.

- Click the **Save** button.

- When prompted, type the password, and click the **Close** button.

For more information about lab setup, refer to the following Help sections in the RenalSoft Software:

Shared Functions → Administrator Only Function → Lab Maintenance

HD/PD Access Management – Add Access

This folder is intended to allow the user to track the creation of an access, infections, hospitalizations, details, assessments and medications related to an access.
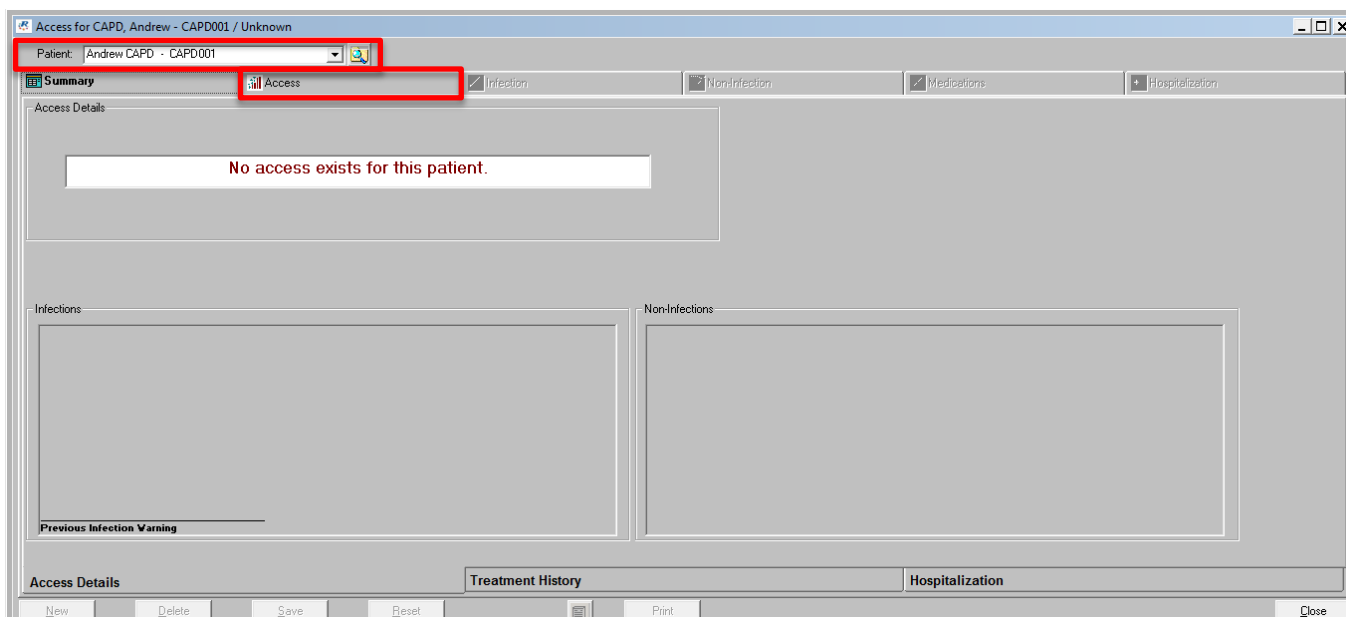
Step 1: Navigate to HD/PD Access Management

- Click **Dialysis** in the left Navigation menu. The **Working with Dialysis** menu displays.

- Click **HD/PD Access Management** in the **Working with Dialysis** menu. The **Access** window displays.
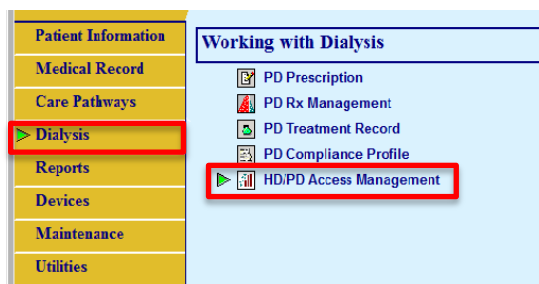
Step 2: Add Access Details

- Select a Patient.

- Click the **Access** tab. The **Access Details** sub-tab displays.

Step 2: Add Access Details (continued)

- Click the **New** button. The **Implant Details** sub-tab displays.

- Verify the PD that is selected.

- Select the Access Type from the drop-down list.

- Complete the required fields in aqua.

- Complete desired optional fields in white.

- Click the **Save** button.

- The **Authenticate Signoff** window displays.

- Enter your name and password and click the **OK** button.

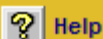For more information about adding an access, refer to the following Help sections in the RenalSoft Software:

HD/PD Access Management → Access Tab

HD/PD Access Management – Infection

Step 1: Add Infection details

Note: If the patient has more than one access, click the **Access** tab and select the desired Access from the list at the top of the screen.

- Click the **Infection** tab.

- Click the **New** button.

- Enter the **Infection Type**. Click the **plus** sign icon to add a new Infection Type to the list.

- Enter the infection information in the required fields.

- Select the **Relapse / Recurrence** checkbox if appropriate.

- Click the **Save** button. The **Authenticate Signoff** window displays.

- Enter your user name and password and click the **OK** button.

Step 2: Add Intervention and Culture/Labs

- Click the blue **plus** sign icon in the **Interventions** section.

- Enter Intervention details.

- Enter the Final Diagnosis details.

- Click the **Save** button.

- Click the **Close** button.

For more information about adding an infection, refer to the following Help sections in the RenalSoft Software:
HD/PD Access Management → Infection Tab

HD/PD Access Management – Non-Infection

Step 1: Access Non-Infection Tab

- Click the **Non-Infection** tab.

- Click the **New** button.

- Enter the non-infection information in required fields.

- Click the **Save** button. The **Authenticate Signoff** window displays.

- Enter your user name and password and click **OK**.

 For more information about adding non-infection information, refer to the following Help sections in the RenalSoft Software:

HD/PD Access Management → Access Tab

For more information about other Access Management features, refer to the following Help sections in the RenalSoft Software:

HD/PD Access Management → Medication Tab

HD/PD Access Management → Hospitalization Tab

RENALSOFT Software

Reporting

The Reports menu contains commands to access Group Reporting, Individual Reports for current patient data and Administrative Reports.

Step 1: Navigate to Reports

- Click **Reports** in the left Navigation menu. The **Working with Reports** menu displays.

- In the **Working with Reports** menu, click the plus and minus icons besides each folder to expand or collapse the folders and locate the desired report.

- Double-click the desired report name.
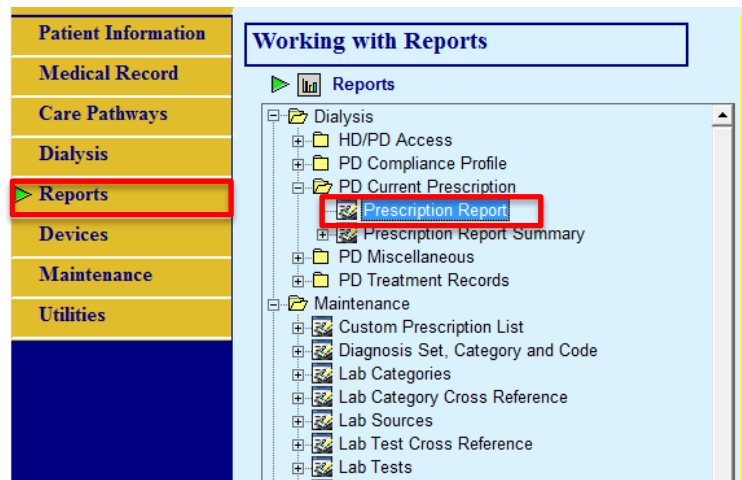
Step 2: Enter Report Selection Criteria & Generate Report

- In the **Selection Criteria** window, select All Patient(s), Patient Group(s), or individual patients.

- Select the Date Range, Sort and/or Filter, and Reporting Criteria, if required.

- Click the **OK** button. The report displays in a new window.
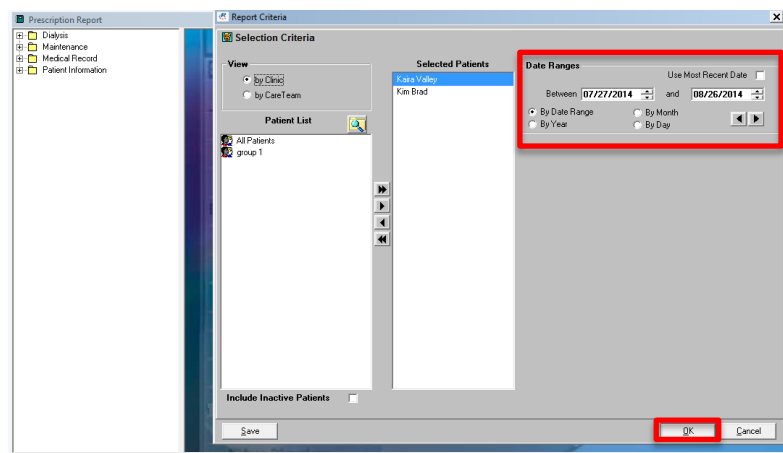
For more information about reports, refer to the following Help sections in the RenalSoft Software:

Shared Functions → Creating Reports

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