

Care Pathways

Dialysis

Reports

Device

Quick Start Guide

RENALSOFT



Software



This guide will help you to get started doing simple tasks in RenalSoft Software.

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Administration – New Staff Set Up



The first step in RenalSoft Software configuration is to set yourself up as an Administrator and add users of the software.

Step 1: Navigate to RenalSoft Software

• Double-click the **RenalSoft** Software icon on the desktop.

Step 2: Access Login

- Type *admin* in the Login ID field.
- Type *admin* in the **Password** field.
- Click the **OK** button.

Step 3: Navigate to New Staff

- Click **Maintenance** in the left Navigation menu.
- Click New Staff from the Working With Maintenance menu.
- The Staff Wizard window displays.





RenalSo v.2.0.1



Step 4: Set up New Staff

- Enter user information on each screen.
- Required fields are noted in aqua color.
- Use buttons at the bottom of the screen to navigate.
- On the **Staff** screen, set **Status** as **Active**.
- Click the **Next** button until the **Security** screen displays.



- On the Security screen, complete the fields
 - Set **Profile** as **PDFULLADMIN**.
 - Select Login Status as Active.
 - Select the Authorize for Signoff checkbox.

Note: Password must be at least 7 characters.

- Click the **Finish** button to complete set up.
- A response message displays indicating the new staff record was created successfully.

🖉 Staff Wizard - Test User	×
Security	
Login Name	
Password	
Verify New Password	
Profile	
View All Patients 🔽	
Login Status	▼
Authorized for Sign off	
JDE Account Number	Clinic JDE Account Number
Initial Home Page Setup ① Default Setup ⑦ Copy Existing Setup 	
Process Bar 🔽 Patient Group	Favorites Enroll Pick Up View
Menu Favorites Report Favori	tes
	Import Export
<u>R</u> eset	<u>≪ B</u> ack <u>N</u> ext>>

Note: After setting yourself up as an administrator, you can logout and log back in with your own Login Name.

REALSOFT Software

UQuick Tips – Staff Set Up

- Additional Staff Create records for Nurses, Physicians, Surgeons and any other staff who will access the application or need to be associated to a patient record.
 - If the staff member does not need access to the application, but will be associated to a patient, then there is no need to complete the **Security** screen.

• Select the **Nephrologist** checkbox if the Doctor is a nephrologist . Nephrologist .

- Add a Surgeon On the Staff screen, locate the Professional Designation field and click the red plus sign icon.
 - Professional Designation
 - The Select List Maintenance screen displays. Click the **New** button, enter **Surgeon** in the **Professional Designation** field.
 - Click the Save button, then click the Close button to close.

Note: The above process can be used to add other designations as necessary for your clinic.

🧟 Sele	ct List Maintenance		×	🥙 Sel	ect List Maintenance		×	×
	Category				Category			
û 🖟	Professional Designation	Active	Close	<u></u>	Professional Designation	Active	Close	
	Nurse	V			Surgeon			
8	Physician	V	New	6	Nurse	V	New	
8	Physician Assistant	v		8	Physician	✓		
8	Nurse Practitioner	V	 Delete	8	Physician Assistant	V	Delete	
8	Registered Nurse	V	 Save	8	Nurse Practitioner	V	Save	
8	Licensed Practical Nurse/Licensed Vocational Nu	V	 	8	Registered Nurse	V		
8	Dietician	v		8	Licensed Practical Nurse/Licensed Vocational Nu	V		

- On the Staff screen, select **Surgeon** in the **Professional Designation** field.
- Complete New Staff set-up.



For more information about New Staff set up, refer to the following Help sections in the RenalSoft Software:

Shared Functions→Administrator Only Functions→Staff Information→New Staff (Staff Wizard)

Shared Functions \rightarrow Administrator Only Functions \rightarrow Security Profiles



Administration – Clinic Configuration

HOME

It is necessary to configure RenalSoft Software specifically to the needs of your clinic.

Step 1: Login

- Enter the admin login you created for yourself in the **Login ID** field.
- Enter your password in the **Password** field.
- Click the **OK** button.

Step 2: Navigate to Clinic Configuration

- Click **Maintenance** in the left Navigation menu.
- Click Administration: Clinic
 Configuration in the Working with
 Maintenance menu.
- The Clinic Configuration window displays.

Login	ID:	
Passwo	ord:	
ОК	Logout	Cancel





Step 3: Configure Clinic

Note: Required fields are noted in aqua color.

- General Information
 - Review information and update as desired.

Name Baxter Dialysis Cent	er - Chicago						
rvipak Direct	The Communications Setur	p	Nizards			🔓 Support Setting	s
eneral Information	🔋 Security Defaults		Facilities			🚇 PD Setup	
Clinic Na	ame Baxter Dialysis Cente	er - Chicago					
Database Backup							
Database Backup Direc	tory C:\Program Files (x88	5)\Baxter Hea	thcare\RSSv50	\DBBackup			
Dual Database Backup Enab	oled 🔽						
Dual Backup Direc	tory						
Known As Name Configura	ation	Units of	Measure				
Last Name followed by First Na	ime 🔿			Weight	Height	Temperature	
First Name followed by Last Na	ime 💿	U.S. Star	ndard	۲	۲	۲	
Patient List Display Option	1	Metric		0	0	•	
Include Primary ID in Patient Li	st 🔽	Lab Rest	ults	U.S.	Standard	\odot International	
Previous Infection Warnin	g	Regiona	l Options				
Number of Infections:	1	Locale	Engli	sh (United Sta	tes)	•	Default
Number of Months:	1	Registry	(Non	e)			•
ompleted by 'training useradmin' on Frid	lay, July 25, 2014 at 12:29:40 pm						

- Security Defaults
 - Remove all checkmarks from the Secured Signoffs section.

Note: Field names in grey cannot be removed.

- Enter required information in the Security Defaults fields.
- Click the **Save** button.

Clinic Configuration				_ 🗆 🗙
Name Baxter Dialysis Cer	nter - Chicago	•		
🔠 Servipak Direct	The Communications Setup	A Wizards	🔓 Support Settings	
General Information	🔋 Security Defaults	Facilities	🚇 PD Setup	ĺ
Secured Signoffs PD Required Care Plan Required RRT Preparation Required [Clinical Encounter Required Clinical Pathway Required Meds/Labs/Other Required Demographic Required HD/PD Access Management f HD Required Completed by 'training useradmin' on Fir	Required	Security Defaults Password exp Password non Password expiry v Pass Inactivity lengt Sign Digital certificate De-Identification Cons	piration days 365 reuse count 3 warning days 7 sword length 7 th in minutes 30 non attempts 10 e expiry days 30 sent Enabled	
New Delete	Save	Reset		Close



Step 3: Configure Clinic (continued)

PD Setup	Clinic Configuration			
	Name Baxter Dialysis C	enter - Chicago	•	1.2
 In the 	Servipak Direct	The Communications Setup		Support Settings
Concentrations	General Information	Security Defaults	Facilities	PD Setup
Display section,	Types of HomeC Japanese Yume Pi	hoice Machines	Display OCPD or High Dose OptiChoice OCPD High Dose	•
concentrations to display in the	PD Compliance M Enforced Purge Treatment Older than	Aonitoring Volume Data 1825 day(s) Purge	Concentrations Display 2 Dextrose 0.5% 0.55%	% Glucose
RenalSoft Software.	Servipak Direct Enabled			
Click the Save button	Two Chamber Ba Enabled	g Prompt		
to commit changes.		Completed by 'training useradmin	' on Monday, August 04, 2014 at 3:12:42 pm	
Click the Close	General Setup 🔁		PD Compliance 다)	

For more information about Clinic Configuration, refer to the following Help sections in the RenalSoft Software:

Save

Reset

Shared Functions \rightarrow Administrator Only Functions \rightarrow Clinic Configuration

Step 4: Navigate to Preferences

Click Maintenance in the left
 Navigation menu.

😵 Help

• Click **Preferences** in the **Working With Maintenance** menu.

Patient Information	Working with Maintenance
Medical Record	Change Password
Care Pathways	Diagnosis Codes
Dialusia	Home Page Setup
Dialysis	😢 Labs
Reports	Medication
Devices	New Staff
Devices	Staff Records
⊳ Maintenance	Patient Groups
TICHAL	Post Reminders
Otinues	▶ 🕂 Preferences
	Printer Setup

Close



Step 5: Configure Preferences

- Miscellaneous tab
 - In **PD Options**, define PRO Card Drive preferences.
 - To locate ProCard Drive,
 - Plug the PRO Card into Computer USB port.
 - Click the Windows icon.
 - Click Computer.
 - Note the letter of the PRO Card drive and then enter it in the ProCard Drive field in the RenalSoft Software.

Miscellaneous Patient Taskbar Report Miscellaneous Settings Show Date and Time Show Date and Time Show Windows Taskbar warning on Startup Show Windows Taskbar warning on Startup Exit With Database Backup Clinic URL http://www.baxter.com/ PD Options Prompt to write PR0 Card for new Prescription Select Servipak Direct Tab when a Pending Prescription Exists ProCard Log File Location C:\Program Files (x86)\Baxter Healthcare\RSSv50\ProCard ProCard Drive A	Reminders	Attack	hments	Mous	e Pointer	Home Page	
Miscellaneous Settings Show Date and Time Show Windows Taskbar warning on Startup Exit With Database Backup Clinic URL http://www.baxter.com/ PD Options Prompt to write PRO Card for new Prescription Select Servipak Direct Tab when a Pending Prescription Exists ProCard Log File Location C:\Program Files (x86)\Baxter Healthcare\RSSv50\ProCard ProCard Drive A	Aiscellaneous		Patient	۲ T	askbar	Report	
Show Date and Time Show Windows Taskbar warning on Startup Exit With Database Backup Clinic URL http://www.baxter.com/ PD Options Prophytic to write PRO Card for new Prescription Select Servipak Direct Tab when a Pending Prescription Exists ProCard Log File Location [C:\Program Files (x86)\Baxter Healthcare\RSSv50\ProCard ProCard Drive A	– Miscellaneous Settin	ns					
Show Windows Taskbar warning on Startup Exit With Database Backup Clinic URL http://www.baxter.com/ PD Options Prompt to write PRO Card for new Prescription Select Servipak Direct Tab when a Pending Prescription Exists ProCard Log File Location [C:\Program Files (x86)\Baxter Healthcare\RSSv50\ProCard ProCard Drive A	Show Date and 1	Fime:					
✓ Exit With Database Backup Clinic URL http://www.baxter.com/ PD Options ✓ Prompt to write PRO Card for new Prescription ✓ Select Servipak Direct Tab when a Pending Prescription Exists ProCard Log File Location C:\Program Files (x86)\Baxter Healthcare\RSSv50\ProCard ProCard Drive A	Show Windows 7	 Faskbar wa	arning on Startup				
Clinic URL http://www.baxter.com/ PD Options ✓ Prompt to write PRO Card for new Prescription ✓ Select Servipak Direct Tab when a Pending Prescription Exists ProCard Log File Location C:\Program Files (x86)\Baxter Healthcare\RSSv50\ProCard ProCard Drive A	Evit With Databa	se Backur					
Clinic URL http://www.baxter.com/ PD Options ✓ Prompt to write PRO Card for new Prescription ✓ Select Servipak Direct Tab when a Pending Prescription Exists ProCard Log File Location C:\Program Files (x86)\Baxter Healthcare\RSSv50\ProCard ProCard Drive A			,				
PD Options ✓ Prompt to write PR0 Card for new Prescription ✓ Select Servipak Direct Tab when a Pending Prescription Exists ProCard Log File Location C:\Program Files (x86)\Baxter Healthcare\RSSv50\ProCard ProCard Drive A	Clinic URL	http://	www.baxter.com/				
 Prompt to write PRO Card for new Prescription Select Servipak Direct Tab when a Pending Prescription Exists ProCard Log File Location C:\Program Files (x86)\Baxter Healthcare\RSSv50\ProCard ProCard Drive A 	- PD Options						
✓ Select Servipak Direct Tab when a Pending Prescription Exists ProCard Log File Location C:\Program Files (x86)\Baxter Healthcare\RSSv50\ProCard ProCard Drive A							
ProCard Log File Location C:\Program Files (x86)\Baxter Healthcare\RSSv50\ProCard	Prompt to write P	RO Card fo	or new Prescription				
ProCard Drive A	 ✓ Prompt to write Pl ✓ Select Servipak I 	RO Card fo Direct Tab	or new Prescription when a Pending Pres	cription	Exists		
	 Prompt to write P. Select Servipak I ProCard Log File Loc 	RO Card fo Direct Tab ation C	or new Prescription when a Pending Pres :\Program Files (x86)\	cription Baxter ⊢	Exists ealthcare\RSSv5	0\ProCard	
	 Prompt to write P Select Servipak I ProCard Log File Loc ProCard Drive 	RO Card fo Direct Tab ation C A	or new Prescription when a Pending Pres :\Program Files (x86)\ 	cription Baxter H	Exists ealthcare\RSSv5	0\ProCard	
	 Prompt to write P Select Servipak I ProCard Log File Loc ProCard Drive 	RO Card fo Direct Tab ation C: A	or new Prescription when a Pending Pres :\Program Files (x86)\	cription Baxter H	Exists ealthcare\RSSv5	0\ProCard	
OK Canad	 Prompt to write P Select Servipak D ProCard Log File Loc ProCard Drive 	RO Card fo Direct Tab ation C: A	or new Prescription when a Pending Pres :\Program Files (x86)\	cription Baxter H	Exists ealthcare∖RSS√5	0\ProCard	

% Help

For more information about Clinic Configuration, refer to the following Help sections in the RenalSoft Software:

User Guide \rightarrow General \rightarrow Basic Program Setup for the Administrator \rightarrow Preferences



Create Patient

HOME

Step 1: Navigate to Patient

- Click **Patient Information** in the left
 Navigation menu.
- Click New Patient in the Working with Patient Information menu. The Patient Wizard window displays.

Working with Patient Information
Demographics
▶ 🛐 New Patient
Select Patients/Groups
Model To Do List

Step 2: Complete Personal Information

Note: Required fields are noted in aqua color.

- Complete all required fields on the **Personal** screen.
- Click the Next button to continue. The Patient Groups page displays.

🧟 Patient	Wizard						X
A.	Per	sonal					
1	<u> (62) _</u>						_
	Clinical Status	Dialysis	•	Birth Date			
	Primary Doctor		-	Gender	Male	C Female	
	Primary ID			Patient Status	Active	C Inactive	
	Secondary ID			Inactive Date			
	Last Name			Inactive Reason		-	
	First Name		M.I.	Marital Status		•	
	Known As			Race		-	
	Maiden Name			Ethnic Origin			
	Transferred			Spoken Language		•	
				First In Center Date			
							_
	1						
<u><u> </u></u>	eset		<< <u>B</u> ack	<u>N</u> ext>>		<u>Einish</u>	e



Step 3: Set Patient Group (Optional)

- Click the **plus** sign icon to add a group.
 - The New Group pop-up displays.
- Enter the name of the group to create in the New Group pop-up, and then click the OK button.

Note: When a New Patient Group is created, it automatically moves to the **Selected Groups** section.

• Click the **Next** button to continue.

+	All Groups	
New Group Enter the name of the new	group you want to create below:	<u>c</u>]
Patient Wizard - John Smith	25	<u>×</u>
All Groups	Cricup 1	Selected Groups
Reset	<< Back Next >>	<u> </u>

Step 4: Other Patient Information (Optional)

- Complete information on the following screens, if desired:
 - Address
 - Phone / Email
 - Additional ID
 - Care Team
- Click the Finish button to create the patient record.



Step 5: Define Patient Modality

- Click Medical Record in the left Navigation menu.
- Click Meds/Labs/Other in the Working with Medical Record menu. The Meds/Labs/Other window displays.
- Patient Information

 ▶ Medical Record

 ▼ Clinical Encounter

 ▶ Television

 Dialysis

 Reports
- Click the **Modality Status** tab located in the top left of the screen.
- Enter required information. Click the **Save** button.
- In the Authenticate Signoff window, enter your password, then click the OK button.
- Click the **Close** button.

🧟 Meds/Lab	os/Other for Patient John Jor	nes - 54321					_ 🗆 🗙
Patient	John Jones - 54321	_					<u>I</u> o Do
Summary		A Medications	Allergies		📥 Lab Results	Despitalization	
📋 Modality	y Status	Diagnosis	Infections		nedical Information	🔊 Transplant History	
+-	Start Date	End Date	Clinical Status	Modality		System	
		Dialysis					
System D) otaile.						
	Clinical Status Dialysis	_	Start Date				
	Modality		Start Reason				
	Location	-	Reason Detail 1	*			
	System			_			
9	Secondary Modality		End Date				
	Secondary System	▼	Reason Detail 1				
D	aily Connection By	▼ ♦	,				
Maur	Dalata	faur Brut	1				Claus
New	<u>U</u> elete	<u>Dave</u> <u>H</u> eset	<u>I</u>	zint			Liose

💡 Help

For more information about creating new patients, refer to the following Help sections in the RenalSoft Software:

Shared Functions → Patient Information → New Patient (Patient Wizard)

Shared Functions \rightarrow Meds/Labs/Other \rightarrow Meds/Labs/Other Folder



Add Prescription

HOME

Step 1: Navigate to Prescription

- Click **Dialysis** in the left Navigation menu.
- Click PD Prescription in the Working with Dialysis menu.
- The PD Prescription Folder window displays.
- Click the Name drop-down menu and select the desired Patient from the list.
- Click the icon to search for Patient records.
- Click the **New...** button to open the PD Prescription Wizard.

Step 2: Set-up Prescription

- To Navigate the Wizard
 - Select the desired screen from the Navigation menu.
 - Click the buttons at the bottom of the window.

Patient Information	Working with Dialysis
Medical Record	▶ 📴 PD Prescription
Care Pathways	PD Rx Management
⊳ Dialysis	D Treatment Record
Reports	PD Compliance Profile III HD/PD Access Management
Devices	



Navigation Modes/Ordered By Therapy Parameters Solutions/Manual Exchange Nurse's Menu Make Adjustments Prompts/Special Fields Additional Rx Information			
<u>R</u> eset << <u>B</u> ack	<u>N</u> ext>>	<u>F</u> inish	<u>C</u> ancel



- Modes/Ordered By
 - Select the desired Therapy Mode radio button.
 - Select the desired **Fill Mode** radio button.
 - Select the ordering physician in the Ordered By drop-down list.
 - Click the **Next** button.

Navigation Modes/Ordered By Therapy Parameters	Modes Therapy Modes	Fill Modes
Soluinn:/Manual Exchange Nurse's Menu Make Adjustments Prompte/Special Fields Additional Rx Information	C HIGH DOSE CCPD C TIDAL C HIGH DOSE TIDAL C CAPD C QUANTUM	 G Standard C Low Fill
Calculated Cycles: Dwell Time: (hrs:min)	- Ordered By Ordered By	
Re-calculate		

Note: Therapy Mode selected will determine the prescription areas displayed in the Navigation list.

- Therapy Parameters
 - Enter the prescribed Therapy Parameters.
 - Therapy Parameters fields will be dependent upon the prescribed Therapy Mode.
 - Click the **Next** button.

B Welcome to the PD Prescription Wizard for John Jo	nes - 54321 CCPD IPD
Welcome to the PD Prescription Witard for John Jo Navigation Modes/Ordered By Hintogy Prescription Solutions/Manual Exchange Nutre's Manual Solutions/Manual S	Therapy Parameters
PD Rx Management	Reset << Back Next >> Finish Cancel



- Solutions/Manual Exchange (optional)
 - Enter Concentration of Therapy Solutions.
 - If Patient has prescribed Manual Exchanges, click the **plus** sign icon for each desired Manual Exchange.
 - Click the **Next** button.

Welcome to the PD Prescription Wizard for Sall	y Smith - 12345 CCPD IPD
Navigation	Therapy Solutions
Modes/Ordered By	Heater Bag
Therapy Parameters Solutions (Manual Exchange	Night Concentration 1
Nurse's Menu	Night Concentration 2
Make Adjustments Prompts/Special Fields	Night Concentration 3
Additional Rx Information	Last Fill Concentration
· · · · · · · · · · · · · · · · · · ·	Manual Exchanges 1
	l
Calculated	Manual Exchanges
Cycles: 4	Exchange Exchange Fill Volume Dwell Time Concentration
Dwell Time: 00:39 (hrs:min)	
Re-calculate	
PD Rx Management	
Import Hx Launch	Heset << Back Next >> Finish Cancel

Nurse's Menu

- Change desired information.

Note: If Tidal mode is selected, select Total Full Drains as Yes and then go to the Therapy Parameters screen to review and update, as appropriate, the Full Drains Every field.

- Click the **Next** button.

Navigation	Nurse's Menu
Modes/Ordered By Therapy Parameters Solutions (Manual Evolutions	
Nurse's Menu Market and Exchange	Min Drain Vol: 85 🍨 %
Prompts/Special Fields Additional Rx Information	Smart Dwels: © Yes C No
Calculated	Heater Bag Empty: 🔿 Yes 💿 No
Custon	Tidal Full Drains: 🔿 Yes 💿 No
	Language: English (US)
D'Weil Time:; (nrs:min)	Flush: 🖝 Yes 🔿 No
	Program Locked: 🔿 Yes 💿 No
Re-calculate	
PD Rx Management	



- Make Adjustments
 - Enter required information.
 - Click the **Next** button.

Modes/Ordered By Therapy Parameters Solution:Manual Exchange Nurse's Meru Addutal Brightness Prompts?Special Fields Additional Rk Information Addutal Rk Information Addutal Rk Information Addutal Rk Information Cycles: Dwell Time: Prompts Re-calculate	Navigation	Make Adjustments
PD Rx Management	Modes/Ordered By Therapy Parameters Solutions/Wanual Exchange Nutre's Menu Made Adductments Prompts/Special Fields Additional Rx Information Calculated Cycles: Dwell Time: (htts:min)	Adjust Brightness <mark>Level 3 ↓</mark> Adjust Loudness <mark>Level 3 ↓</mark> Auto Dim Yes ← No Initial Drain Alam © On ← Off Initial Drain Alam Value 1400 — ml Comfort Control 36 °C Last Manual Drain ← Yes ← No
PD Rx Management	Re-calculate	
	PD Rx Management	

- Prompts/Special Fields
 - Select the desired **Prompts**.
 - Select Log Patient Volume Data checkbox.
 - Click the **Next** button.





- Additional Rx Information (optional)
 - Enter information such as patient's blood pressure, dry weight, pulse, etc.
 - Night cycles and dwell times will be automatically calculated and displayed.

Navigation Modes/Ordered By Therapy Parameters Solution: Manual Exchange	Additional Rx Information
Nuce's Menu Make Adjuttments Prompte/Special Fields Additional Fix Information	Pre Therapy Post Therapy Blood Pressure / / / Dry Weight ● Ib ⊂ kg
Cycles: Cycles	Pulse FCC Temperature FCC Blood Sugar MI Urine Volume MI
PD Rx Management	

Note: Entering values in Dry Weight and UF Goal fields enhances reports and graphs.

- Click the **Finish** button.
- Enter **Password.**
- Click **OK** to continue.
- Click Yes to write the prescription to the PRO Card.

Note: Insert the PRO Card into the PRO Card Adapter and connect the adapter to the computer *before* clicking **Yes.**

- Click **No** to write the prescription to the PRO Card at a later time.
- The PD Prescription Wizard window closes and the PD Prescription Folder displays.

Auther	nticate Signoff	x
is accurate Si	a and has been properly reviewed. aff Member:	
P.	training useradmin	
Ľ		
	OK Cancel	
PD Presci	iption Folder [B8053]	
?	Do you wish to write this prescription	on to the PRO Card?
	Ver	No

Click the Write Rx button at the bottom of the PD Prescription Folder window to write the prescription to the PRO Card.



Close

Step 3: Verify Prescription Written to PRO Card

- In the PD Prescription Folder window, click
- Click **Devices** in the left Navigation menu.
- Click Verify Prescription in the Working with Devices menu.



Step 4: Print Report

- Click **Reports** in the left Navigation menu. The **Working with Reports** menu displays.
- Click the **Plus Sign** to expand the **Dialysis** folder.
- Click the **Plus Sign** to expand the **PD Current Prescription** folder.
- Double-click **Prescription Report**.



• Enter the Report Criteria and click the **OK** button. The report displays in the **Prescription Report** window.

😵 Help

For more information about topics in this section, refer to the following Help sections in the RenalSoft Software:

 $PD \rightarrow PD$ Prescription (RX) Folder



Import Information from PRO Card (Converted from PD Link Software)

<u>HOME</u>

Step 1: Set-up PRO Card for transfer

- Insert the patient's PRO Card into the PRO Card Adapter.
- Connect the PRO Card Adapter to the computer.



Step 2: Import Data

- Click **Devices** in the left Navigation menu.
- Click ProCard: Import Results in the Working with Devices menu.
- Patient Information

 Medical Record

 Care Pathways

 Dialysis

 Reports

 > Devices
- From the **Import Patient Results** window, in the **Import Data** section, select the **Card** radio button.
- Click the **Begin** button.





Step 3: Wait for Import to Complete

- The RenalSoft Software PD import utility will read and process the patient information and treatments found on the card.
- Patient Status will indicate
 ".....Processing" taking place.
- Once all files have been processed, a confirmation message will display.
- The Import Patient Results Statistics window will display the total number of treatment results successfully imported.



😵 Help

For more information about importing PRO Card data, refer to the following Help sections in the RenalSoft Software:

 $PD \rightarrow PRO \text{ Card} \rightarrow \text{Importing Results Via PRO Card}$

Step 4: Match and Merge Patient Records

Converted PD Adequest Software users should Match and Merge patient records after importing data from the PRO Card in order to minimize duplicate records and ensure data integrity.

Please see the <u>Match and Merge</u> section for further instructions.



Patient & Prescription Management (Converted from PD Adequest Software)



Step 1: Activate Patients

- Click **Dialysis** in the left Navigation menu.
- Click PD Rx Management in the Working with Dialysis menu.



- The RenalSoft PD Rx Management window displays.
- In the Patient section,
 - Active patients display in black text and have the Active field checked.
 - Inactive patients display in red text and have the Active field unchecked.
 - Select the View PDRxMgt Active Patients checkbox to hide / show inactive patients.
- To activate an inactive patient, double-click the Active checkbox for the appropriate patient record.

Å	Rei	nalSoft P	D Rx N	lanage	ment											
Ei	le	<u>S</u> earch	<u>V</u> iew	<u>P</u> atie	nt <u>C</u> ol	lection	<u>R</u> eports	<u>G</u> raphs	Syst	em	<u>H</u> elp		_			_
P	atie	nt: John	Jone	s (543)	21)	Collectio	n Date:						Г	View PDRxMg	t Active Patient	\$
	nîn.	Θ		8		١		H	h	2	B	2	_			
D	etails	s 24-Ho	ur I	PET	Regimen	Optimize	Nutrition	Center	Do	ctor	Nurse	Grp Rpts				
2	P <u>a</u> tie	ent(s)														
	ID N	lumber		First	Name		Last Nar	ne		Active	Gender	Birth Date		Home Phone	Work Phone	
•	543	21		John			Jones			V	М	12/1/1960				
	1234	45		Sally			Smith			L	F	1/2/1975				

Step 2: Import Prescription

If a patient has a regimen in PD Rx Management, it can be imported to PD Prescription.

- Click **Dialysis** in the left Navigation menu.
- Click PD Prescription in the Working with Dialysis menu.

Patient Information	Working with Dialysis
Medical Record	PD Prescription
Care Pathways	PD Rx Management
Dialysis	PD Treatment Record
Reports	PD Compliance Profile III HD/PD Access Management
Devices	



Step 2: Import Prescription (continued)

- The **PD Prescription Folder** window displays.
- Click the Name drop-down menu and select the desired Patient from the list.
 - Click the isometry icon to search for Patient records.
- Click the New... button to open the PD Prescription Wizard.
- In the Prescription Wizard window, click the Import Rx button to load the prescription.
- The most recent PD Rx Management regimen record will be imported into the PD Prescription Wizard.
- Follow the steps in <u>Patient Set-up</u>: Add <u>Prescription</u>, starting at Step 2, to make changes and complete the prescription.

- FU Pres	,				
ime:	Sally Smith - 12345	_ <u>N</u>	Date:		
Dialysis	Therapy 📇	Medications 🕜		Reports 🕎	
-				found for the	_
		ecription record	I WAS I	cound for the	
	NOTBIL	scription record			
	Norbrie	selected Pat	tient		
	Norbrie	selected Pat	tient		
	No i b i ic	selected Pa	tient		
	NOT DITIC	selected Pat	tient		
		selected Pat	tient		
A	uccess	selected Pat	tient	exists for this patient.	
A	iccess	Selected Pat	No access of the second	exists for this patient.	
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B Welcome to the PD Prescription Wizard for Sally Sm	nith - 12345 CCPD IPD		×
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😵 Help

For more information about topics in this section, refer to the following Help sections in the RenalSoft Software:

- PD Rx Management \rightarrow What's New in PD Rx Management
- PD Rx Management \rightarrow Viewing Information in RenalSoft PD Rx Management
- PD → Prescription (RX) Folder → Importing Rx From RenalSoft PD Rx Management

RENALSOFT

Software

Match and Merge (Converted PD Adequest Software)

Step 1: Navigate to Match and Merge

- Click **Maintenance** in the left Navigation menu.
- Click Match and Merge from the Working with Maintenance menu.
- The Match and Merge Manual Merge window displays.
- Click the **Yes** button to back up the database.



Step 2: Match & Merge

- Select the **Record Type** to merge.
- Locate the record to merge and click the Select button.
- The record will move from the **Submit Records to Merge** to the **Merge These Records...** section.

Match and Merg	ge - Manual Merges											_
	Recor	d Type Patient Records						•				
Select Record	ls to Merge									Find		
Source DB	Full Name	Last Name	First Name	M.I. Maiden Name	Primary ID	Secondary ID	Status	Sex	Birth	Death	Residence Street 1	Residence Street 2
RenalSoft	John Jones	Jones	John		54321			Male	12/1/1960			
RenalSoft	Sally Smith	Smith	Sally		12345			Female	1/2/1975			
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Merge These F	Records			Select			Deselect					
Source DB	Full Name	Last Name	First Name	M.I. Maiden Name	Primary ID	Secondary ID	Status	Sex	Birth	Death	Residence Street 1	Residence Street 2
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Mak This D.	ecord									Find		
with this ht												
Source DB	Full Name	Last Name	First Name	M.I. Maiden Name	Primary ID	Secondary ID	Status	Sex	Birth	Death	Residence Street 1	Residence Street 2
Source DB RenalSoft	Full Name Sally Smith	Last Name Smith	First Name Sally	M.I. Maiden Name	Primary ID 12345	Secondary ID	Status	Sex Female	Birth 1/2/1975	Death	Residence Street 1	Residence Street 2
Source DB RenalSoft RenalSoft	Full Name Sally Smith John Jones	Last Name Smith Jones	First Name Sally John	M.I. Maiden Name	Primary ID 12345 54321	Secondary ID	Status	Sex Female Male	Birth 1/2/1975 12/1/1960	Death	Residence Street 1	Residence Street 2
Source DB RenalSoft RenalSoft	Full Name Sally Smith John Jones	Last Name Smith Jones	First Name Sally John	M.I. Maiden Name	Primary ID 12345 54321	Secondary ID	Status	Sex Female Male	Birth 1/2/1975 12/1/1960	Death	Residence Street 1	Residence Street 2
Source DB RenalSoft RenalSoft	Full Name Sally Smith John Jones	Last Name Smith Jones	First Name Sally John	M.I. Maiden Name	Primary ID 12345 54321	Secondary ID	Status	Sex Female Male	Birth 1/2/1975 12/1/1960	Death	Residence Street 1	Residence Street 2
Source DB RenalSoft RenalSoft	Full Name Sally Smith John Jones	Last Name Smith Jones	First Name Sally John	M.I. Maiden Name	Primary ID 12345 54321 Merge!	Secondary ID	Status	Sex Female Male	Birth 1/2/1975 12/1/1960	Death	Residence Street 1	Residence Street 2
Source DB RenalSoft RenalSoft	Full Name Sally Smith John Jones	Last Name Smith Jones	First Name Sally John	M.I. Maiden Name	Primary ID 12345 54321 Merge!	Secondary ID	Status	Sex Female Male	Birth 1/2/1975 12/1/1960	Death	Residence Street 1	Residence Street 2
Source DB RenalSoft RenalSoft	Full Name Sally Smith John Jones	Last Name Smith Jones	First Name Sally John	M.I. Maiden Name	Primary ID 12345 54321 Merge!	Secondary ID	Status	Sex Female Male	Birth 1/2/1975 12/1/1960	Death	Residence Street 1	Residence Street 2
Source DB RenalSoft RenalSoft	Full Name Sally Smith John Jones	Last Name Smith Jones	First Name Sally John	M.I. Maiden Name	Primary ID 12345 54321 Merge!	Secondary ID	Status	Sex Female Male	Bith 1/2/1975 12/1/1960	Death	Residence Street 1	Residence Street 2
Source DB RenalSoft RenalSoft I Lo	Full Name Sally Smith John Jones	Last Name Smith Jones	First Name Sally John	M.I. Maiden Name	Primary ID 12345 54321 Merge!	Secondary ID	<u>Status</u>	Sex Female Male	Bith 1/2/1975 12/1/1960	Death Beset	Residence Street 1	Residence Street 2



Step 2: Match & Merge (continued)

• Select the record to merge with and then click the Merge button.

Match and Merg	e - Manual Merges													_ 0
	Rec	ord Type Patient Records							•					
Select Record	s to Merge										Find			
Source DB	Full Name	Last Name	First Name	M.I.	Maiden Name	Primary ID	Secondary ID	Status	Sex	Birth	Death	Residence Street 1	Residence Street 2	2
RenalSoft	John Jones	Jones	John			54321			Male	12/1/1960				
RenalSoft	Sally Smithe	Smithe	Sally			90780			Female	1/2/1975				
<u> </u>				_			_							_
Merge These F	lecords			Sel	ect			Deselect						
Source DB	Full Name	Last Name	First Name	M.L.	Maiden Name	Primary ID	Secondary ID	Status	Sex	Birth	Death	Residence Street 1	Residence Street 2	2
RenalSoft	Sally Smith	Smith	Sally			12345			Female	1/2/1975				
<u> </u>				_										
With This Re	ecord										Find			_
Source DB	Full Name	Last Name	First Name	M.I.	Maiden Name	Primary ID	Secondary ID	Status	Sex	Birth	Death	Residence Street 1	Residence Street 2	2
RenalSoft	Sally Smithe	Smithe	Sally			90780			Female	1/2/1975				
RenalSoft	John Jones	Jones	John			54321			Male	12/1/1960				_
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								<u> </u> 946			Deser		FIO26	

- When the merge is complete, the **Log** field will be updated with a summary of the merge.
- Click the **Save** button, enter your password, and click the **OK** button to commit changes.

Note: Merged Patient records will be combined into a single record.

lest Deced	to Maria	,									Find		
Seurce DR	s to Merge	Last Name	First Manage	мт	Maidan Mana	Drim and ID	Secondary ID	Chabus	Seu	Diale	Death	Desidence Street 1	Desidence Street 2
Source DB	rui name	Last Name	First Name	M.I.	Maiden Name	Frimary ID	Secondary ID	Status	Sex	10/1/1000	Death	Hesidence Street I	Hesidence Street 2
PenalSoft	Solly Smithe	Cmitho	Sollu			94321			Fomale	1/2/1/1360			
rienaisoit	Sally Strikt le	Similare	Jaiy			30700			remaie	17271373			
1													
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Source DB	Editional Contraction	LastMana	First Mana	MI	Maidan Mana	J Drimony ID	Secondau ID	Carton	C	Diale	Death	Desidence Chest 1	Devidence Over 2
	rui Name	Last Name	riist wante		Maiden Maine	Fillinary ID	Secondary ID	Status	Sex	Dirti	Digan	nesidence Sileet i	Hesidence Street 2
/ With This Be	cord	Last Name	Filst Maille		Maiden Maille	Phillip ID	Secondary ID	Status	56X	Ditti	Find	nesuence sueet 1	Hesidence Street 2
With This Re	cord	Last Name	First Name	M.L	Maiden Name	Primary ID	Secondary ID	Status	Sex	Birth	Find	Residence Street 1	Residence Street 2
With This Re Source DB RenalSoft	Fuil Name John Jones	Last Name Last Name Jones	First Name John	M.L	Maiden Name	Primary ID Primary ID 54321	Secondary ID	Status	Sex Sex Male	Birth 12/1/1960	Find	Residence Street 1	Residence Street 2
With This Re Source DB RenalSoft RenalSoft	Cord Full Name John Jones Sally Smithe	Last Name Jones Smithe	First Name John Sally	M.I.	Maiden Name	Primary ID 54321 90780	Secondary ID	Status	Sex Sex Male Female	Birth 12/1/1960 1/2/1975	Find	Residence Street 1	Residence Street 2
With This Re Source DB RenalSoft RenalSoft	Fuil Name Fuil Name John Jones Sally Smithe	Last Name Jones Smithe	First Name John Sally	M.I.	Maiden Name	Primary ID 54321 90760	Secondary ID	Status	Sex Sex Male Female	Birth 12/1/1960 1/2/1975	Find Death	Residence Street 1	Residence Street 2
With This Re Source DB RenalSoft RenalSoft	Fuil Name Fuil Name John Jones Sally Smithe	Last Name Jones Smithe	First Name John Sally	M.I.	Maiden Name	Primary ID 54321 90780	Secondary ID	Status	Sex Sex Male Female	Bith 12/1/1960 1/2/1975	Find Death	Residence Street 1	Residence Street 2
With This Re Source DB RenalSoft RenalSoft	cord Full Name John Jones Sally Smithe	Last Name Janes Smithe	First Name John Sally	M.I.	Maiden Name	Primary ID 54321 90780 Merge!	Secondary ID	Status	Sex Sex Male Female	Bith 12/1/1960 1/2/1975	Find Death	Residence Street 1	Residence Street 2
With This Re Source DB RenalSoft RenalSoft	Fuil Name Fuil Name John Jones Sally Smithe	Last Name Jones Smithe	First Name John Sally erged into record 1	M.I.	Maiden Name	Primary ID S4321 90780 Merge!	Secondary ID	Status	Sex Sex Male Female	Bith 12/1/1960 1/2/1975	Find Death	Residence Street 1	Residence Street 2

% Help

For more information about topics in this section, refer to the following Help sections in the RenalSoft Software:

Shared Functions \rightarrow Administrator Only Functions \rightarrow Match and Merge Data

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