HC Standard®

User Manual

Version 4.4

HC Standard® User Manual

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Revision history:
Rev. 1, July 2015 - Version 4.2
Rev. 2, April 2016 - Version 4.4

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Chapter 1 - User Manual Overview

1 - 1: Roles in HC Standard®

Users: HC Standard® Users view and update information in the system.

Admins: HC Standard®Administrators create, manage, and grant item access to users and Sub-Admins. This role has unlimited system access.

Sub-Admins: HC Standard® Administrators manage users under their jurisdiction and provide access to items created by an HC Standard® Administrator (Admin).

1 - 2: Audience for this Manual

This manual is intended for users (including Admins) with different degrees of knowledge and experience with the system. A glossary of terminology is included at the end of this manual.

- **Users:** The system users (including Admins and Sub-Admins) will learn how to log into the HC Standard® system in order to access and update the critical health information concerning their specific Incident Command System (ICS) or Emergency Support Function (ESF) positions within an organization. Additionally, system users will learn to navigate the system in order to:
  - Run reports, view maps, charts, files and links
  - View system announcements and critical updates
  - Receive, acknowledge and send notifications
  - View and customize dashboard elements as granted by the HC Standard® Admin

HC Standard® is a healthcare situational awareness system, and will be configured in accordance with each organization's policies and procedures involving healthcare information management. By utilizing this system, access may be granted to sensitive healthcare information and Patient Health Information (PHI). As such, all organizations and users are considered HIPAA associates and must exhibit all the care and security control as with any other sensitive PHI. For more information about the intent of this system within specific organizations, please see your supervisor or HC Standard® Administrator.

1 - 3: System Requirements

HC Standard® users, granted appropriate permissions, may access HC Standard® over the Internet using any device that has the following features:

System Requirements
PC

- Microsoft Internet Explorer 10 (or higher); or the latest version of Google Chrome or Mozilla Firefox
- Adobe Acrobat Reader 6.0+ for Forms; other PDF reader software may be used but is not supported
- 1.6 gigahertz (GHz) or faster 32-bit (x86) or 64-bit (x64) processor
- Minimum 1gb (or more) RAM
- Internet Access

Mobile Device

- *iOS 5+*
- *Android 4+*

Chapter 2 - Introduction to HC Standard®

2 - 1: Introduction

HC Standard® allows people working in multiple locations, and/or fulfilling diverse healthcare responsibilities, to effectively track patients and manage key resources. The system is completely customizable, allowing each organization to decide exactly what to track and who has access to information.

Examples of resources tracked in HC Standard® include:

- Facilities: hospitals, plant status, specialty beds, etc.
- Alternate Care Sites: skilled nursing facilities, long term acute care beds, etc.
- Equipment: ventilators, monitors, durable medical equipment, etc.
- Supplies: blood, medicines, fluids, linens, etc.
- People: staff members, volunteers, patients, etc.

Examples of reasons for tracking such resources include:

- Patient Triage and Treatment: daily EMS runs, hospital surge, mass casualty events.
- Earthquake: relief supplies, transportation location, funds allocation.
- Hurricane Evacuation: shelter locations and allocation, family reunification, fatalities, mortuary affairs.

Information in the system, or available within the system via direct, live data feeds, can be presented as tables, charts, reports or maps, and/or exported in several common file formats. Users can submit and update data from virtually anywhere, using a wide variety of devices, including desktop PCs in hospitals, laptops in temporary facilities, tablets on the go, or handheld computers at an incident scene.

HC Standard® and the HC Standard® Suite of applications are HIPAA and HITECH compliant. Data is encrypted on the local device, whenever information is synchronized, and finally at the back-end server.

Information is only available to authorized users with the appropriate permissions.

2 - 2: Key Features

Track, Measure, and Export Critical and Routine Information

HC Standard® is a flexible system for structuring information and allows an organization to aggregate all data, both critical and routine, from a variety of sources. No matter what the data (e.g. patients, ambulances, blood types, vehicles, alerts, weather conditions or even parking spaces), it can be tracked in HC Standard®. Data can be collected, measured, shared, viewed, and exported to allow quick communication and decision-making throughout the organization.

Workspaces

HC Standard® **Workspaces** keep mission critical information, along with communication and decision-making tools at the user's fingertips. This provides actionable intelligence for near real-time situational awareness that supports decision-making, regardless of the incident. FIGURE 2-1 is an example of information maintained in a user's workspace.

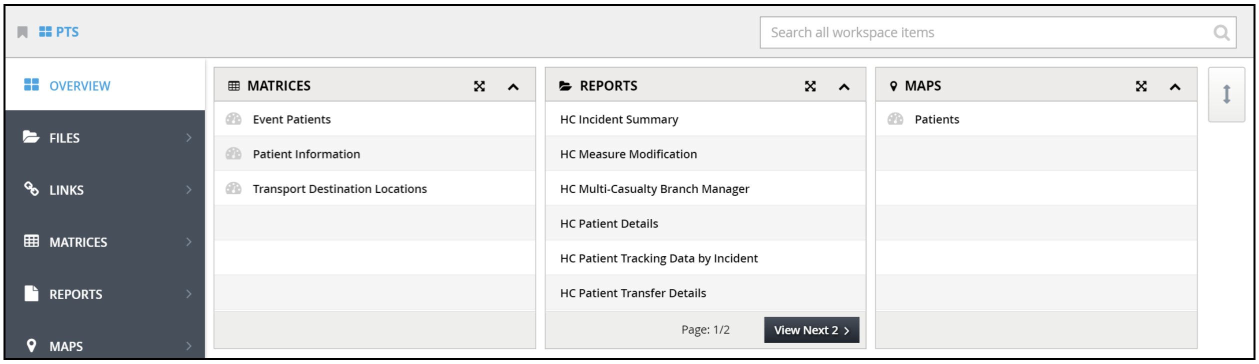


FIGURE 2-1: Workspaces

Notifications

Notifications can be sent as an email, a text message, or directly within HC Standard® as a pop-up. FIGURE 2-2 is an example of a notification sent to a user.

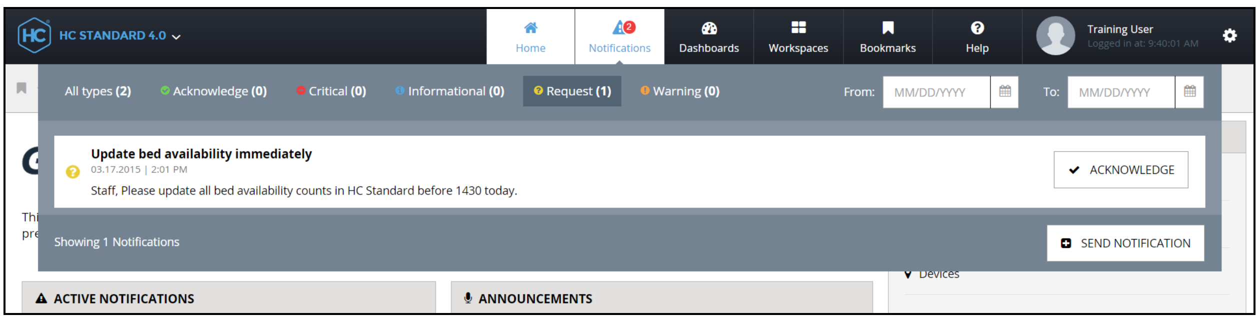


FIGURE 2-2: Notification Bar

Customizable Charts, Reports and Maps

Customizable charts, reports and maps in HC Standard® allow for data to be arranged in compelling visual forms.

Charts and **Maps** are *dynamic*, reflecting data changes as soon as they occur. Custom icon images on maps can be associated with the data and displayed automatically.

Reports can be refreshed to include the latest data entries and can be exported in Acrobat (.pdf), comma delimited (.csv), Excel (.xls), Rich Text Format (.rtf), and Tagged Image File Format (.tiff) formats. Built-in report functions, including averages and totals, facilitate at-a-glance decision-making.

Chapter 3 - Getting Started with HC Standard®

3 - 1: Launching HC Standard®

To launch HC Standard®, *open* any web browser and *enter* the organization's access **URL** into the navigation bar.

- HC Standard® URL: ____

Each organization is provided a unique access URL. If the access URL is unknown, please contact GER Technical Support by calling **1.866.242.4035** or by emailing **support@ger911.com**.

3 - 2: Logging In To HC Standard®

After successful navigation to the organization's access URL, the login prompt will appear on the screen. In order to successfully log into the system, a valid username and password are required. This credential-based system ensures that only authorized users gain access to admin tools in HC Standard®.

To log into HC Standard®, as shown in FIGURE 3-1:

1. *Type* the valid **Username** and **Password**, provided by an Admin.
2. *Click or tap* the **Sign In** button.

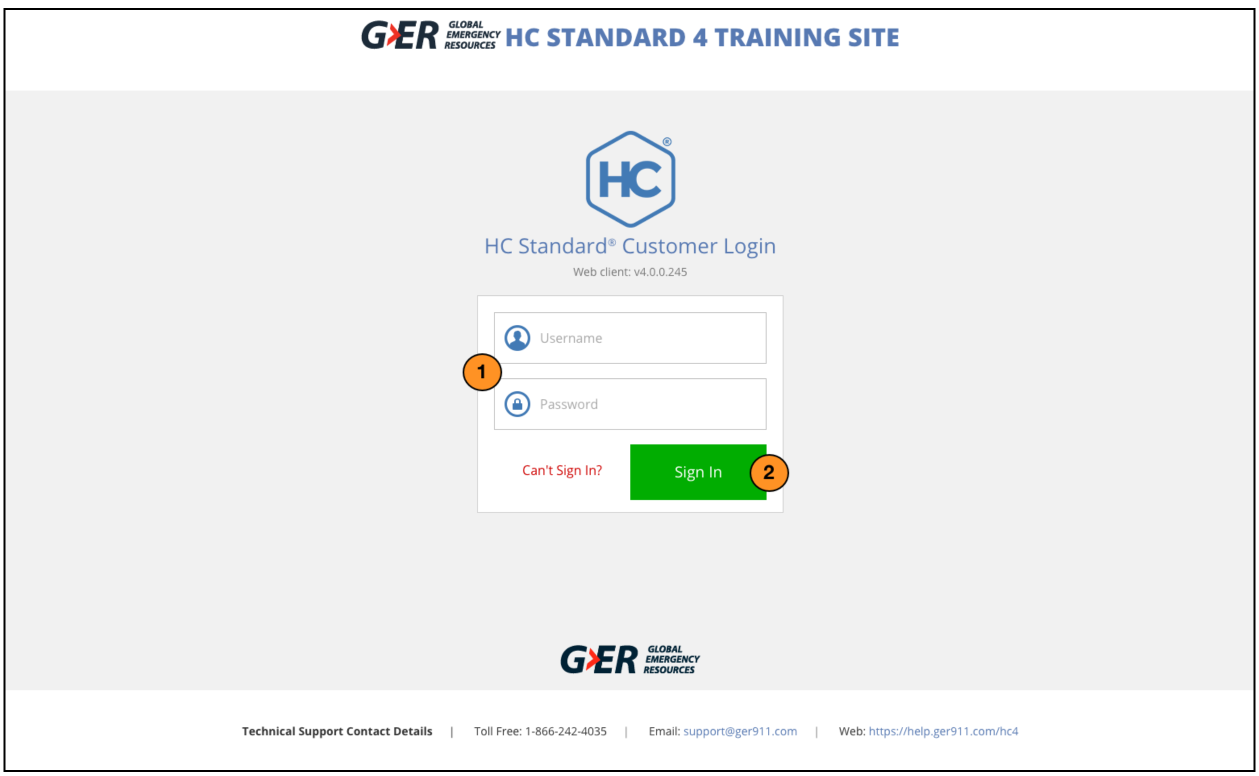


FIGURE 3-1: Login Dialog

The login may fail for the following reasons:

- An invalid username/password combination will lead to an error message. Proceeding into the HC Standard® application will not be possible until a valid username and password are entered.
- Three consecutive attempts to log in with a valid username, but an invalid password will result in an error message stating, **Account is Locked Out**. Logging into the system with that specific username will not be possible (even with the valid password) for the predetermined lockout period.

Note: The default configuration lockout period is 15 minutes. In order to log in within this period, an Admin must be contacted. Admins have access to manually unlock accounts at any time.

3 - 3: The Home Page

After logging into HC Standard®, the **Home** page appears.

The Home page displays a **Tab Navigation Menu** at the top of the screen, as shown in FIGURE 3-2. Depending on the selection made within each menu, the bottom of the screen will update to show a dashboard or a workspace.

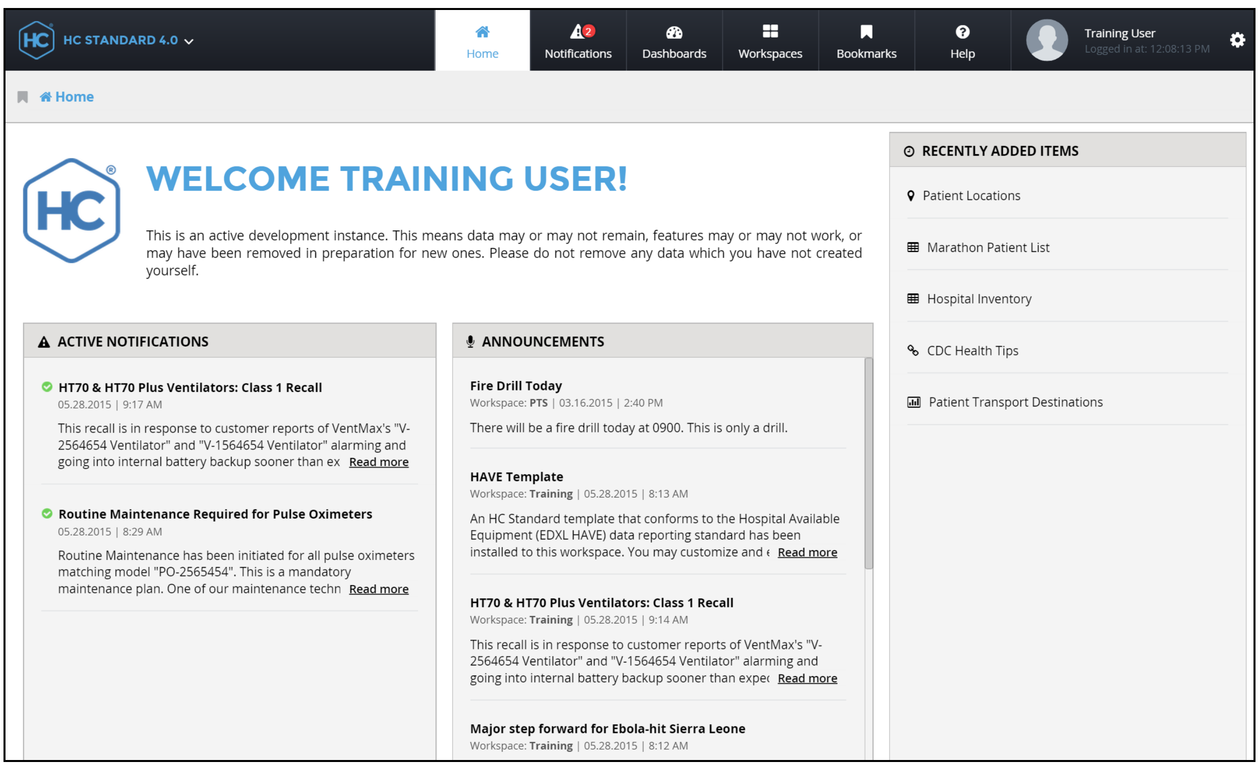


FIGURE 3-2: Home Page

3 - 3.1 Tab Navigation Menu

The **Tab Navigation Menu**, at the top of the screen, includes several navigation options. *Clicking or tapping* on any of these options will present different valuable tools and information within HC Standard®, as shown in FIGURE 3-3.

1. **Application Launcher:** The system defaults to HC Standard® 4.0. From the drop-down menu, a user may switch to another application in the HC Standard® Suite (Incident Commander, CHATS Module, CHRS Module, or EPCR Module).
2. **Home:** Access the Welcome Page from anywhere in the application.
3. **Notifications:** View received notifications and send new notifications to other users. For more information, see "Notifications" on page 53.
4. **Dashboards:** View and navigate available dashboards. For more information, see "Dashboards" on page 65.
5. **Workspaces:** View and navigate available workspaces. For more information, see "Workspaces Overview" on page 15.
6. **Bookmarks:** Access bookmarked items. For more information, see "Bookmarks" on page 13.
7. **Help and Support:** Access HC Standard® online help and support.
8. **User Profile Settings**: Change options for the user profile, general settings, enter Admin mode (if available), enter full screen, and logout.

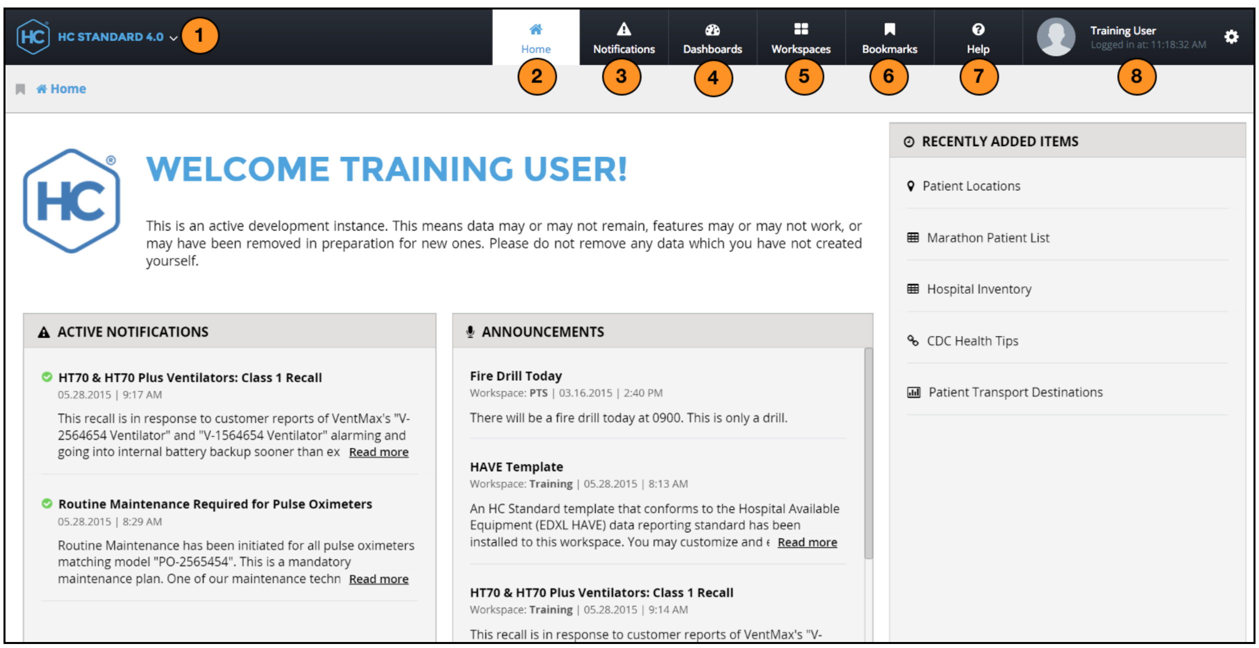


FIGURE 3-3: Navigation Bar

3 - 3.2 Desktop vs Mobile View

HC Standard® 4.0 introduces a new responsive design to accommodate both desktop and mobile screens. Depending on the type of device used, users may see small differences between each respective view. Overall, there are no limitations to using either view, only visual aesthetic differences are made.

FIGURE 3-4 shows HC Standard® as seen on a desktop screen. HC Standard® utilizes all available real estate to display the application. The workspace item navigation menu is displayed along the left-hand side of the screen.

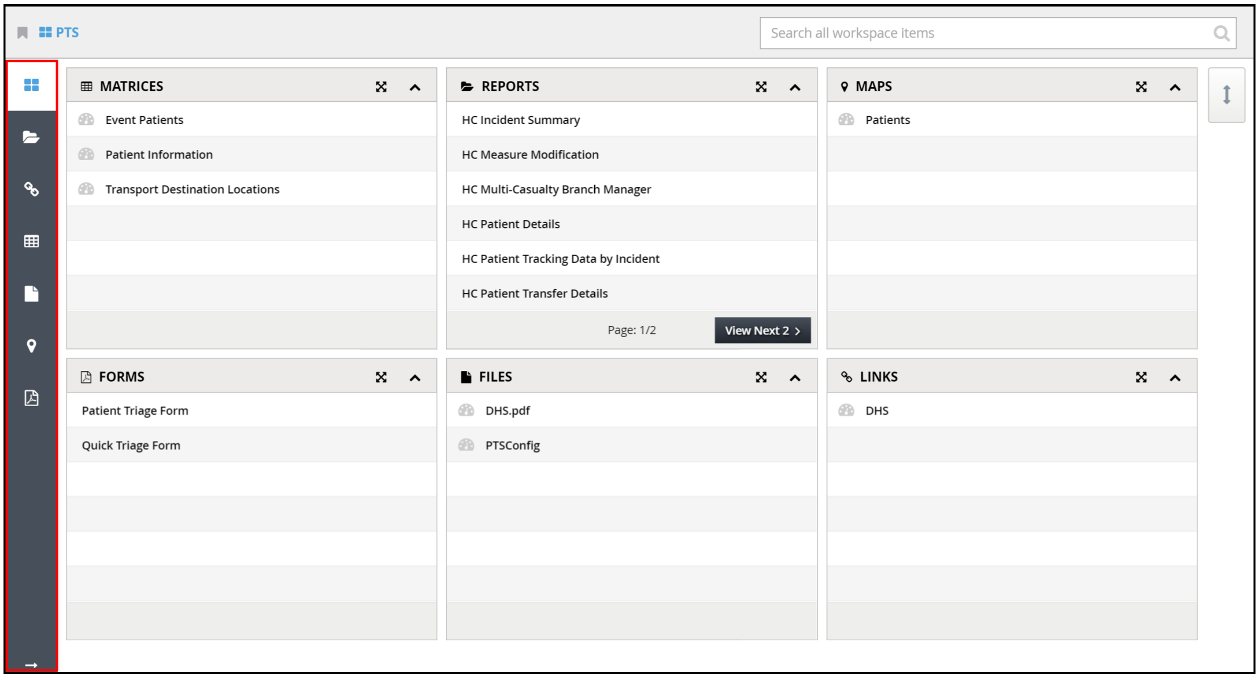


FIGURE 3-4: Desktop View

FIGURE 3-5 shows HC Standard® as seen on a mobile device screen. HC Standard® conserves real estate and understands users are on smaller displays. The workspace item navigation menu is moved to the top of the screen.

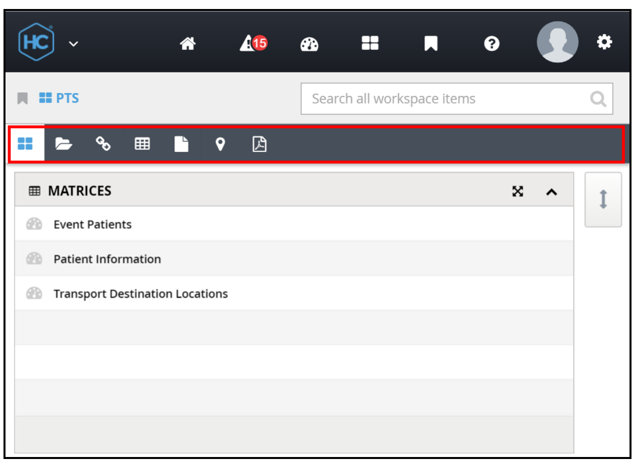


FIGURE 3-5: Mobile View

3 - 4: User Profile

HC Standard® users have the ability to update their **contact information**, **notification preferences**, and **password** from the **User Profile**.

To access the user profile, as shown in FIGURE 3-6:

1. *Click or tap* on the **User** icon.
2. *Click or tap* **Profile** from the drop-down menu.

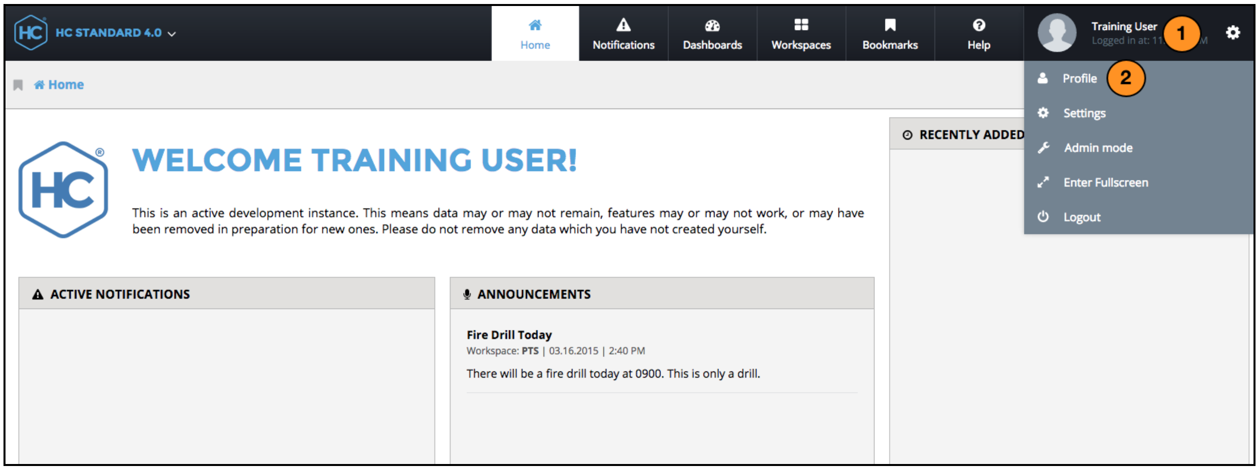


FIGURE 3-6: User Menu

To enter or change information in the user profile, as shown in FIGURE 3-7:

1. *Click or tap* in the **Email** field to enter or update the user's email address. Users may also update any other additional fields as necessary.
2. *Check* **Notify by Email:** Determines if notifications will be sent to the email address on file.
3. *Check* **Notification Popups:** Determines if the system will display a pop-up notification when one is received.
4. *Check* **Notify by SMS:** Determines if the system will send a text message to the cell phone or pager associated with the user's account.
5. *Check* the **Stay logged in** checkbox (if available) to stay logged in even when no action is performed in a certain amount of time.
6. *Click or tap* **Submit Profile Changes** when finished.
7. *Click or tap* **Reset Settings** to reset all custom matrix settings (from sorting to filtering to display order) applied by the user.
8. *Click or tap* **Close** to close the dialog.

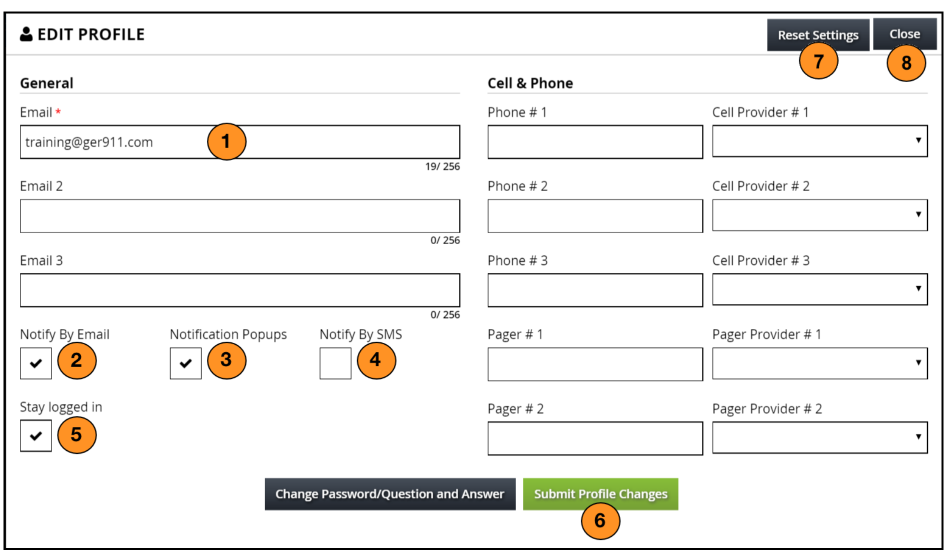


FIGURE 3-7: User Profile

Note: If a user is not receiving notifications, check the User Profile. For more information on notification options, see "Notifications " on page 1.

3 - 5: Passwords

Password Rules

HC Standard® passwords must have *at least* **seven characters**, and *at least* **one non-alpha-numeric symbol** (!, @, #, $, %, etc.) to be considered valid.

Valid examples:
mYp@ssworD!
gu3$$th1$

Invalid examples:
mypas!: only six characters
mypassword: doesn't have a non-alpha-numeric symbol

Important! For system security, it is important to create a password that would be difficult for others to guess.

Changing a Password

Once logged in, the initial password must be changed, as shown in FIGURE 3-8.

1. *Click or tap* on the **User** icon.
2. *Click or tap* **Profile** from the drop down menu.

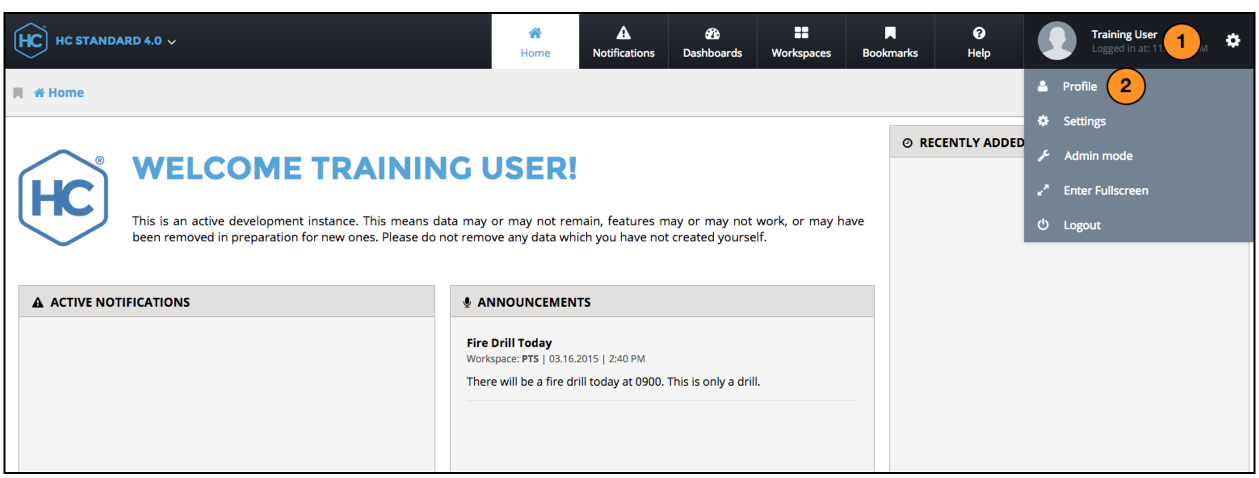


FIGURE 3-8: User Menu

1. *Click or tap* the **Change Password/Question and Answer**, as shown in FIGURE 3-9.

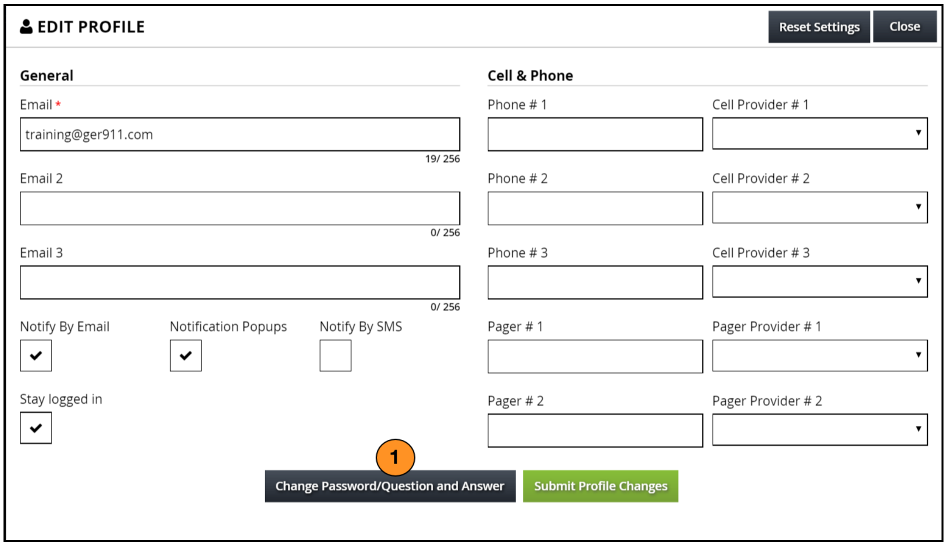


FIGURE 3-9: Change Password Button

To modify the fields, as shown in FIGURE 3-10:

1. *Enter* the **Old Password** in the first field.
2. *Enter* the **New Password** into the second field.
3. *Re-enter* the new password in the **Confirm Password** box.
4. *Click or tap* the **Change Password** button to confirm the changes made.

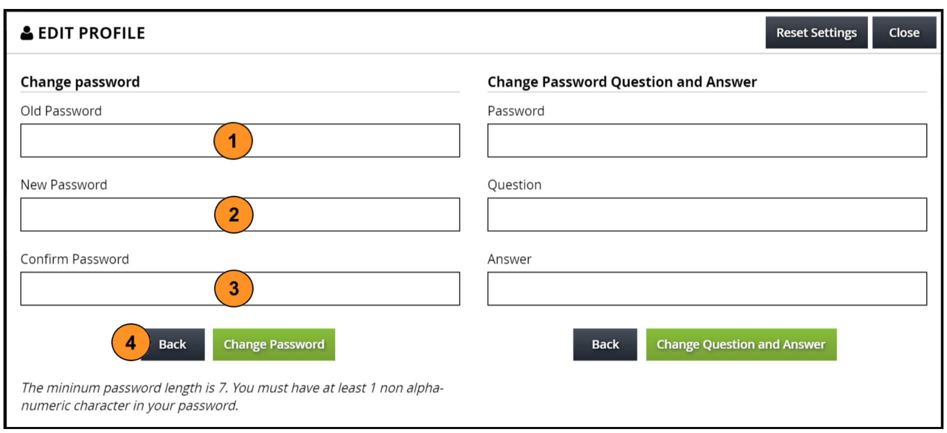


FIGURE 3-10: Change Password Dialog

A message stating **Password Changed** will confirm that the new password is in effect.

Important! To be valid in the HC Standard®, a password must have at least seven characters, and have at least one non-alpha-numeric symbol (!, @, #, $, %, etc.).

Note: Once a password has been changed, the user will not be able to use the previous password again.

Resetting a Password

If the password is forgotten, HC Standard® can e-mail a temporary password. The user profile must have a *valid* e-mail address on file. If a user has multiple emails in their profile, reset instructions will be sent to the first email in the user's profile.

To start the password reset process, as shown in FIGURE 3-11:

1. *Click or tap* the **Can't Sign In?**.

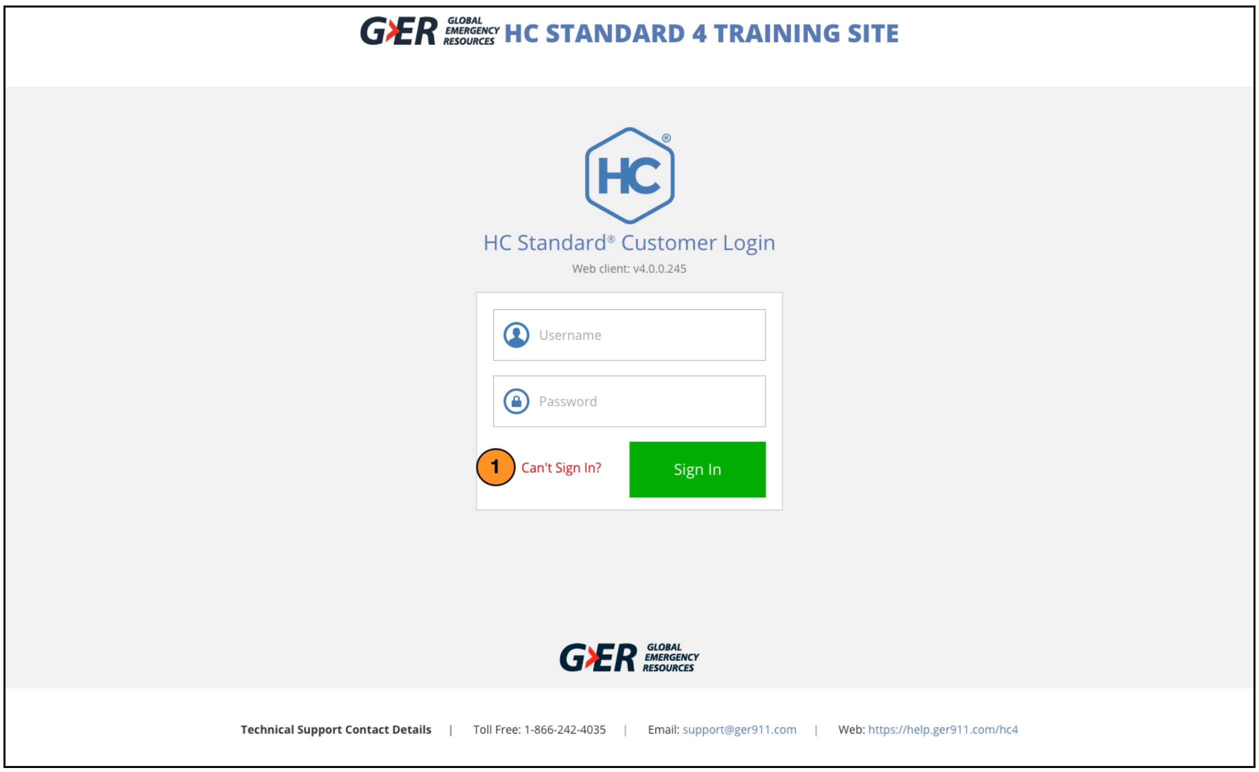


FIGURE 3-11: Can't Sign In Link

To continue the password reset process, as shown in FIGURE 3-12:

1. *Enter* the email address for the account.
2. *Click or tap* the **Send** button. If an email address was found in the system, a message indicating that a password reset link has been sent will appear. When the password reset link arrives, use it to reset the password for the account.

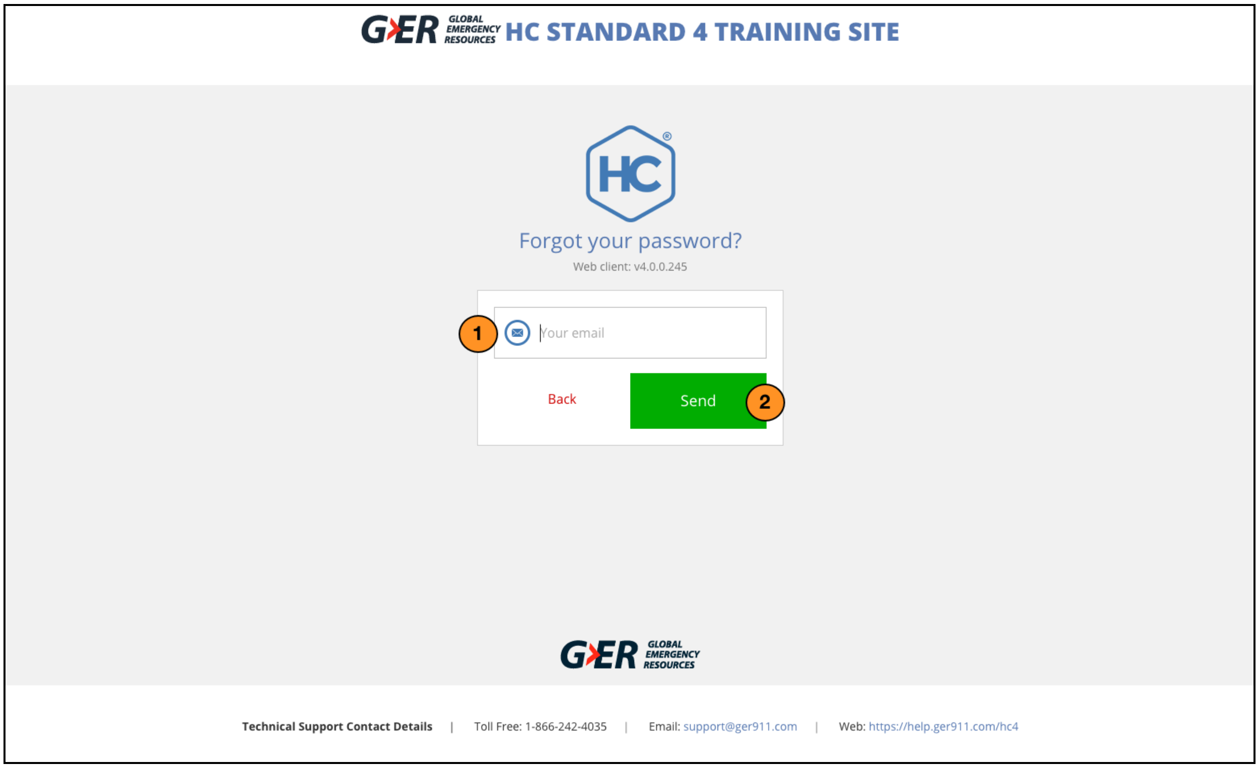


FIGURE 3-12: Forgot Password Page

To reset the password:

- *Follow* the password reset link provided in the email.
- *Enter* the temporary password as the **Old Password**.
- *Enter* and confirm the **New Password**.
- *Click or tap* the **Submit** button to confirm the changes made.

Note: If there are multiple accounts associated with the same email address, the user will not be able to reset the password using the **Can't Sign In?** link.

3 - 6: Bookmarks

To make navigation easier in HC Standard®, important items can be bookmarked for quick access. In FIGURE 3-13 below, a map is being bookmarked inside a workspace for quick access. To bookmark an item:

1. *Navigate* to the location within HC Standard® that is to be bookmarked. In this example, the user is navigating to **Maps**.
2. *Click or tap* the **Bookmark** icon in the navigation bar. In this example, the bookmark icon is located to the left of the **PTS** link.

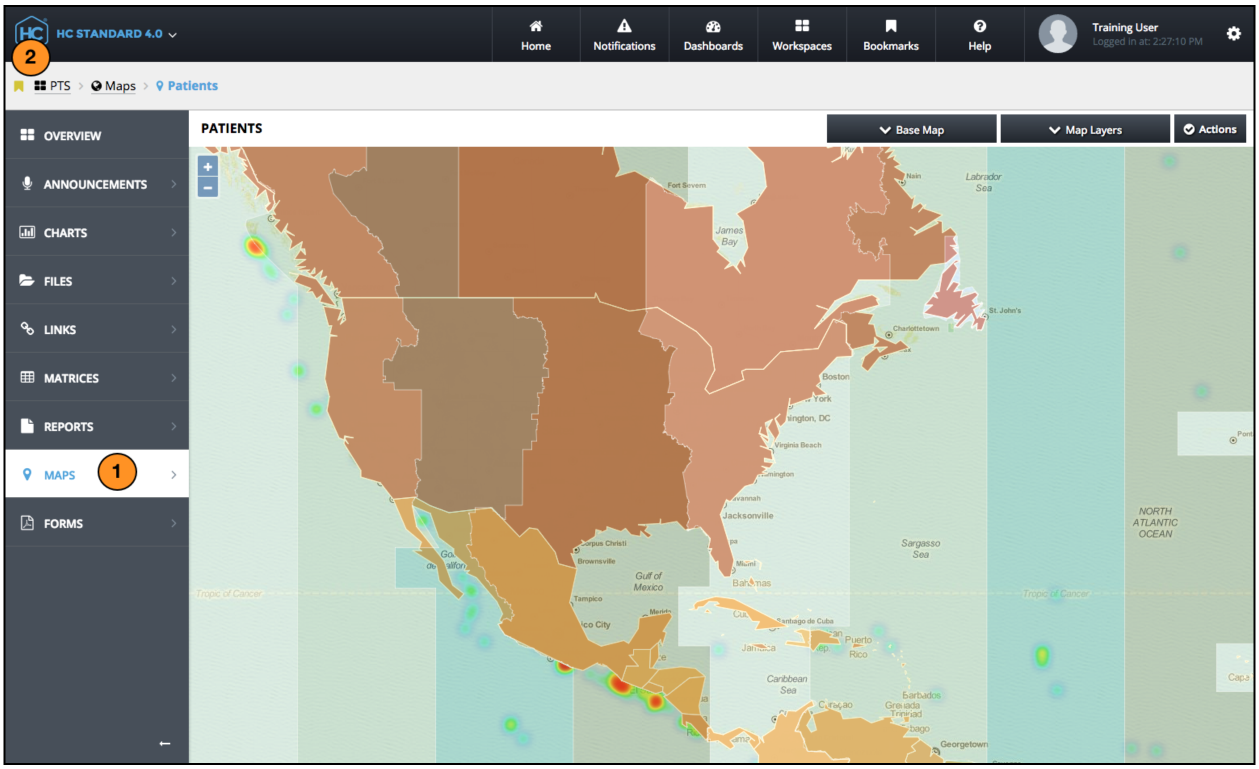


FIGURE 3-13: Bookmarking a Location

Finish setting up the bookmark, as shown in FIGURE 3-14.

1. *Type* a **Name** for the bookmark in the text box.
2. *Click or tap* the **Add** button to save the bookmark.

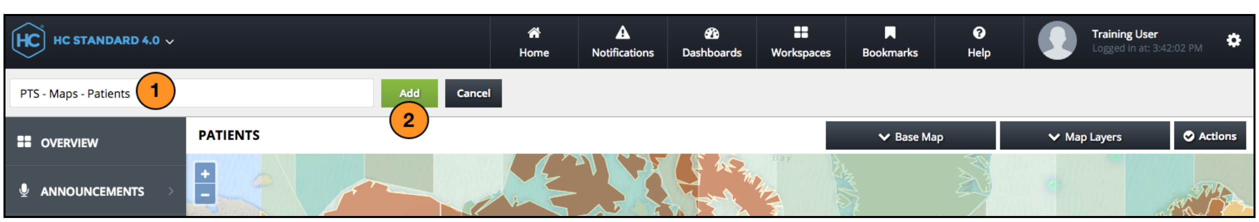


FIGURE 3-14: Add Bookmark Name

To view all bookmarks, as shown in FIGURE 3-15:

1. *Click or tap* the **Bookmarks** tab in the **Tab Navigation Menu**.
2. Begin typing in the **search bookmarks** field to narrow the results of all bookmarks. In the example below, there is only one bookmark.
3. *Click or tap* the **bookmark name** to navigate directly to that bookmark's location.

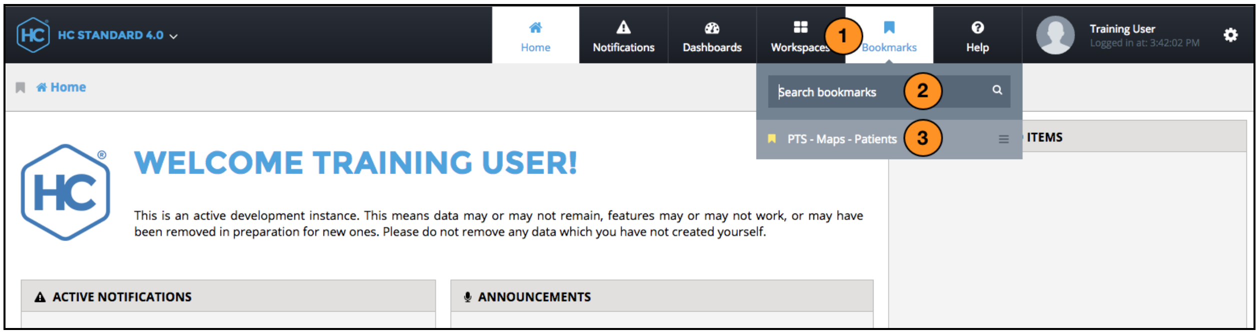


FIGURE 3-15: Bookmarks

3 - 7: Logging out

When finished using HC Standard®, it is best to log out of the application to ensure that an unauthorized person does not gain access to data in the system.

To log out, as shown in FIGURE 3-16:

1. *Click or tap* the **User** button. This can be done from anywhere within the application.
2. *Click or tap* the **Logout** option from the drop-down menu. To log back into the application, see "Logging In To HC Standard®" on page 4.

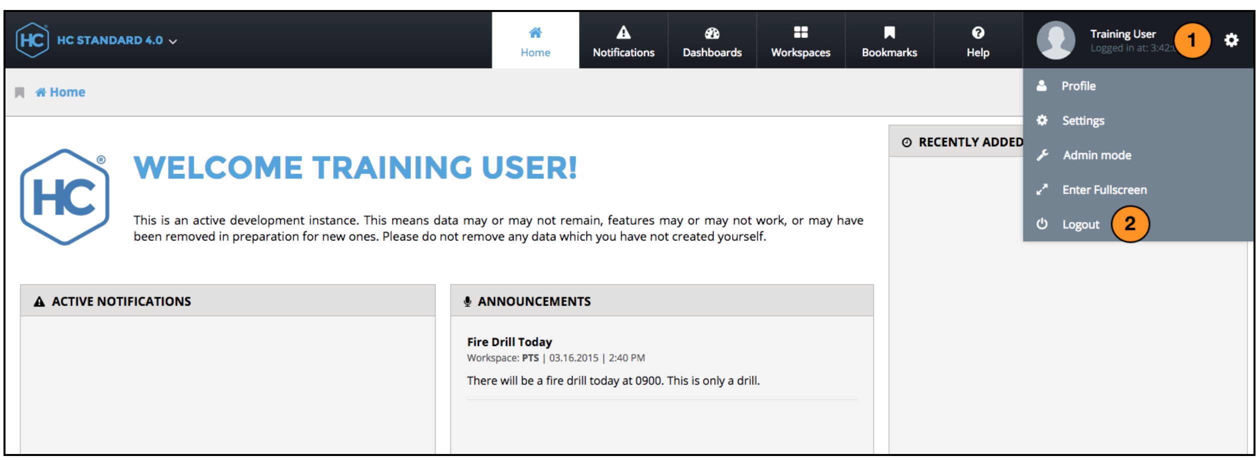


FIGURE 3-16: Logging Out

Chapter 4 - Using HC Standard®

4 - 1: Workspaces Overview

Workspaces organize data within HC Standard®. A workspace may contain items like **Matrices**, **Maps**, **Reports**, **Announcements**, **Forms**, and **Files** that relate to that workspace. With data organized in this way, it is easy to go anywhere in the system. FIGURE 4-1 is an example of Workspace items inside a Workspace.

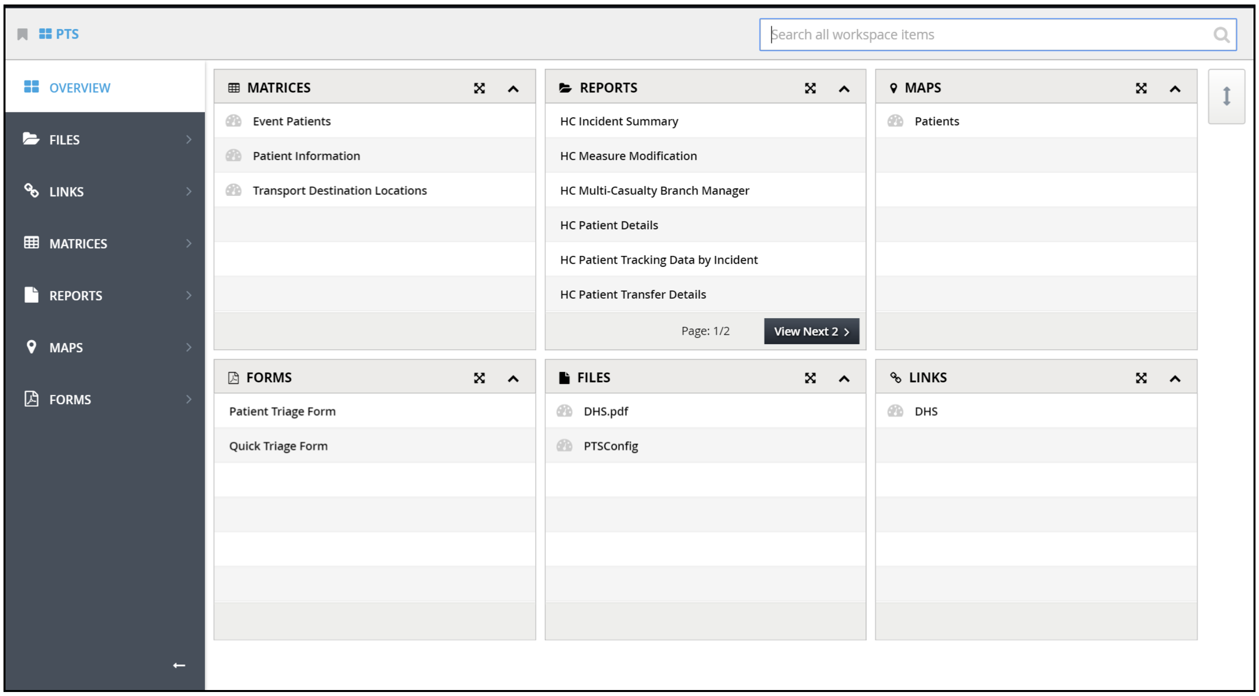


FIGURE 4-1: Workspace Items inside a Workspace

A workspace contains subject relevant material, e.g., a specific incident like Hurricane Katrina, a specific hospital (or group of hospitals), a specific inventory (e.g., blood supplies), or any other subject.

Relevant **Matrices**, **Links**, **Files**, etc., may be placed within the workspace. The data is not exclusive to any particular workspace and may be assigned to multiple other workspaces. For example, a matrix called "Blood Supplies" might be included in both "Emergency Medical Services" and "Public Health" workspaces.

An Admin may assign various levels of permissions to users for access into each of the workspaces.

- **Read Only** – The user may only view the information.
- **Read/Write** – The user may view, change and enter data.
- **Admin** – The user may create and publish new workspace items and links.

4 - 1.1 Workspace Items

Items in a **Workspace** are organized by category in the **Workspace Item** menu. This menu may be located to the left side of the screen or along the top of the screen if on a mobile device.

Workspace items include, as shown in FIGURE 4-2:

1. **Announcements** may be added to any HC Standard® workspace. Depending on user permissions, **Announcements** may be created and posted.
2. **Charts** allow information to be displayed graphically as pie charts or bar graphs.
3. **Files** available may be opened from the **Files** section.
4. **Links** lists web sites and displays each web site directly within HC Standard®. **Links** may be added to this list.
5. **Matrices** are grids of data that may be used on their own or to populate **Reports**, **Charts** and **Maps**.
6. **Reports** display the data in a print preview, then allow **Reports** to be sent to a printer or to be exported into a variety of formats.
7. **Maps** display matrix information that includes GPS coordinates in a visual map representation.
8. **Forms** are another way to enter data into HC Standard®.

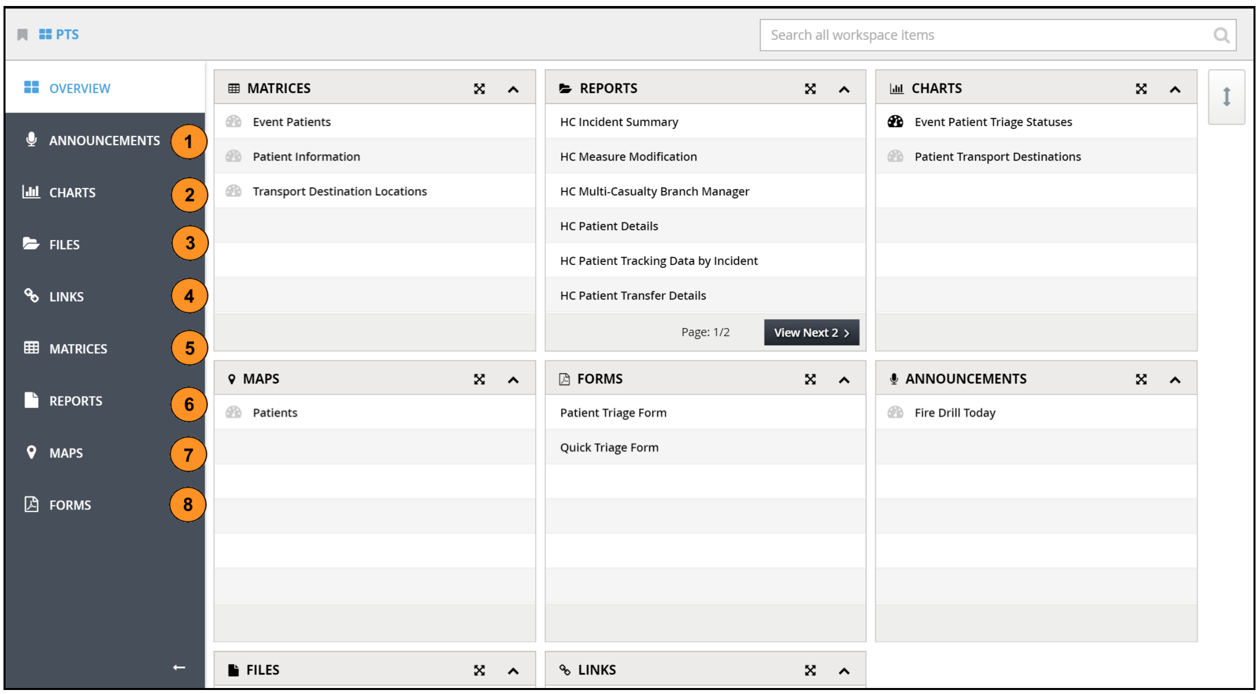


FIGURE 4-2: Workspace Items

4 - 1.2 Navigating to a Workspace

In FIGURE 4-3, the **Workspaces** tab has been selected and the drop-down menu is shown. The contents of the Workspaces tab will stay visible until another item on the screen is selected. To navigate between **Workspaces**, the **Home Page** and items on the **Workspace page**:

1. *Click or tap* the **Workspace** button within the **Tab Navigation Menu** at the top of the screen.
2. **Search workspaces** allows a user to search for a desired workspace
3. Workspace list displays a list of all workspaces. This list updates with results from the search box as text is entered.
4. **Show favorites**, when toggled on, will display only user's favorite workspaces (workspaces with a yellow star to the left of the name)

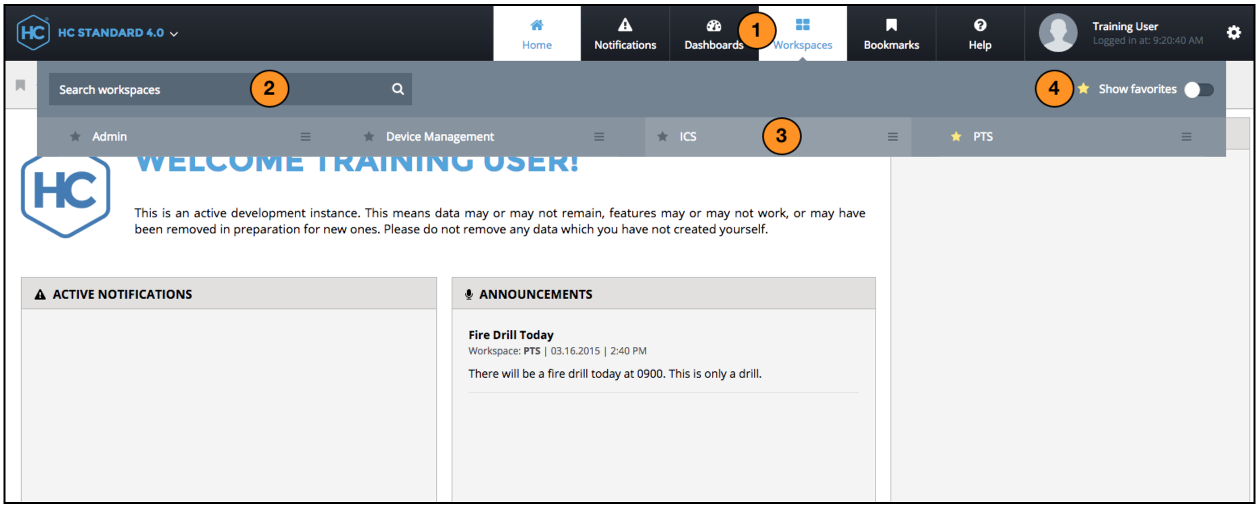


FIGURE 4-3: Navigating to a workspace

After a **Workspace** has been selected, the user can navigate around the workspace using tabs, as shown in FIGURE 4-4

1. *Click or tap* the individual **Tabs** in the **Workspace Item** menu to navigate between categories.
2. Navigation to individual items can be done by *clicking or tapping* on the **item name** in the desired category.

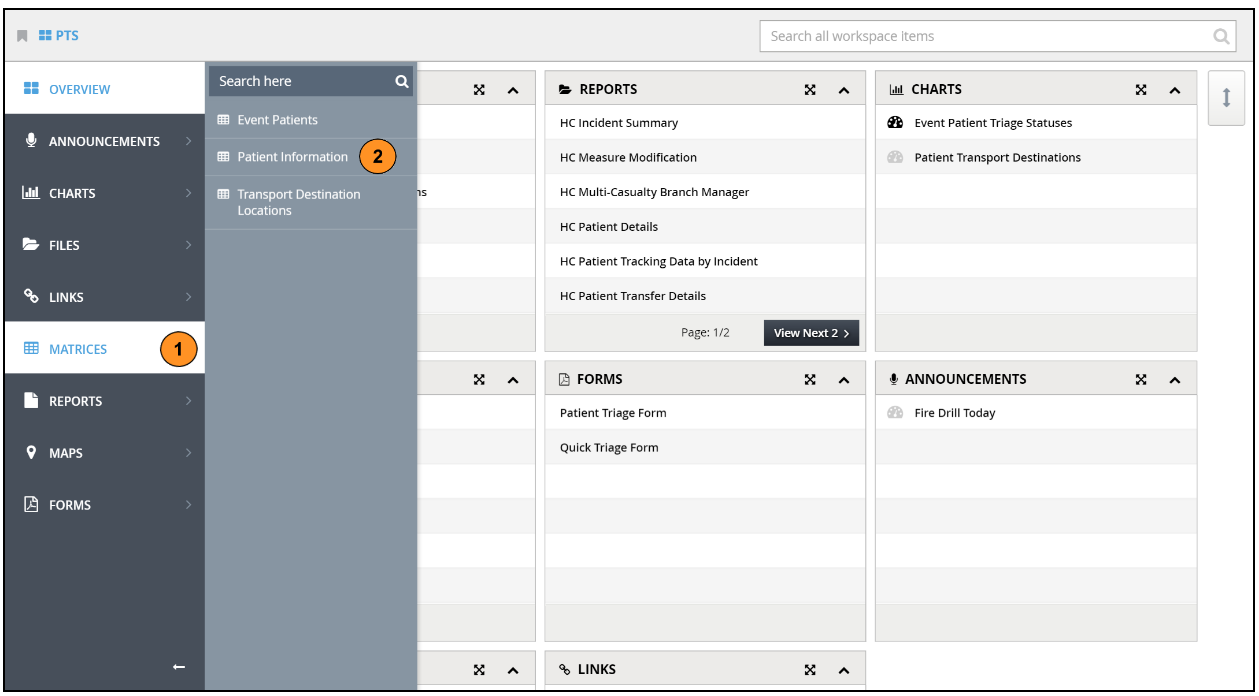


FIGURE 4-4: Workspace Item Menu

4 - 1.3 Searching Workspaces

Workspaces can be searched for by using the **Search** in the **Workspace** tab of the **Tab Navigation Menu**. FIGURE 4-5 is an example of a search for the **Admin** workspace by typing the letter **D**. Notice that the **Device Management** workspace also appears in the search results, because it also contains the letter **D**. To execute a search:

1. *Click or tap* the **Workspace** tab in the **Tab Navigation Menu** at the top of the screen.
2. *Type* the desired search information into the box.

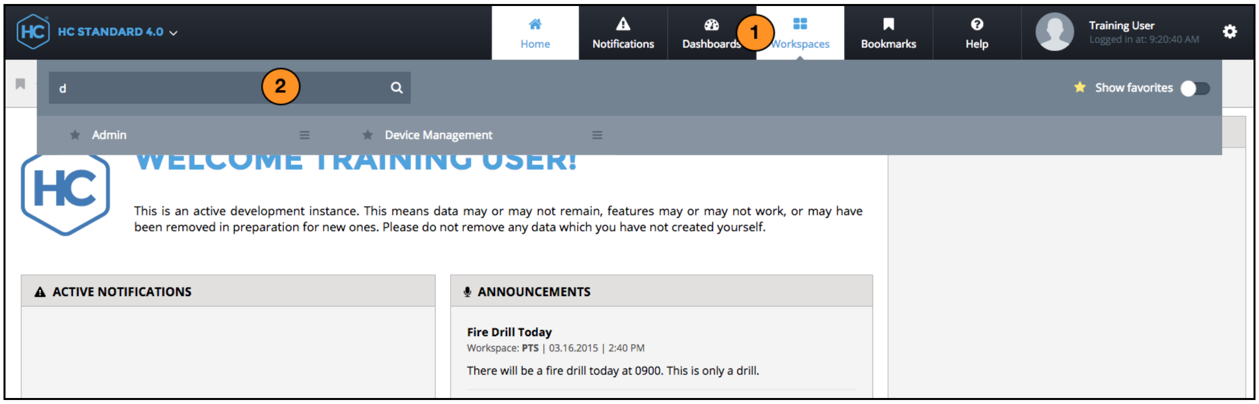


FIGURE 4-5: Search in Navigation Bar

To clear a search *delete* the text from the search box.

4 - 1.4 Using Workspace Favorites

To aid in the navigation of the HC Standard® application, users may favorite commonly accessed workspaces. After adding favorite workspaces, users can toggle the **Show favorites** switch to show only the favorite workspaces. FIGURE 4-6 shows a user having selected the **PTS** workspace as a favorite. To tag a workspace as a favorite:

1. *Click or tap* the **Workspace** tab in the **Tab Navigation Menu** at the top of the screen.
2. *Click or tap* the **star** icon next to the desired workspace name

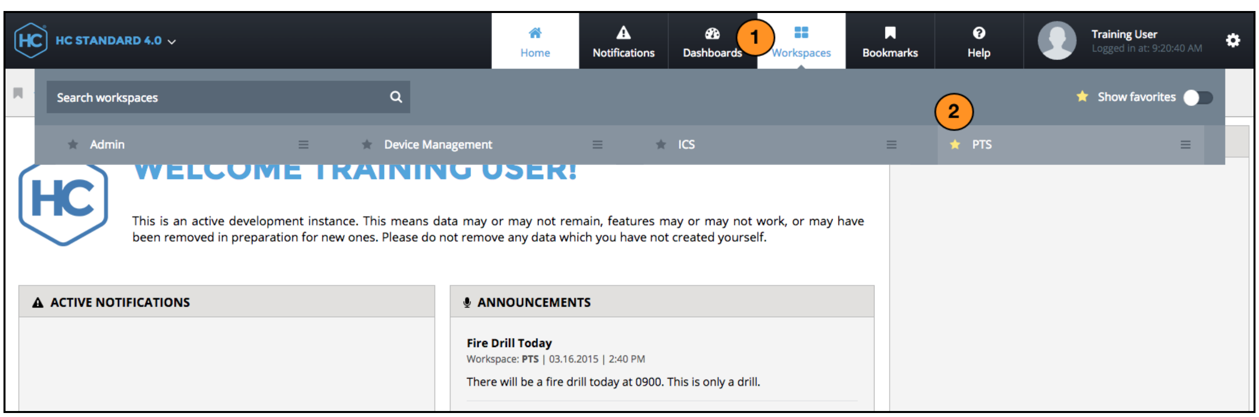


FIGURE 4-6: Workspace Favorite Icon

To un-tag a workspace as a favorite, *click or tap* the **star** icon again to remove it.

After adding favorites, the workspace tab can then be quickly filtered to only show favorite workspaces. FIGURE 4-7 is an example that shows the workspace **PTS** selected as a favorite, with the **Show favorites** toggle turned on. To filter the workspace view to only show favorites:

1. *Click or tap* the **Workspace** tab in the **Tab Navigation Menu** at the top of the screen.
2. *Click or tap* the **Show Favorites** toggle in the workspace tab.

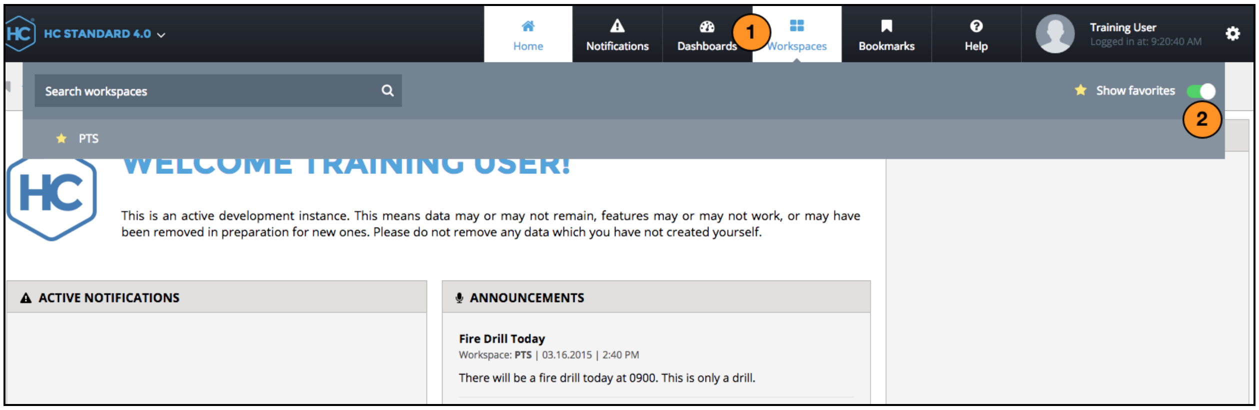
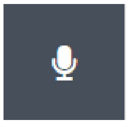


FIGURE 4-7: Workspace Favorites Toggle

4 - 2: Announcements



Announcements are notices that are posted on a bulletin board within a **Workspace**.

Some announcements may have an expiration date. In such cases, the announcement will be deleted from the workspace on a pre-determined date. At this time, only HC Standard® Administrators may create an announcement and an expiration date (if there is one).

4 - 2.1 Viewing an Announcement

To view an announcement within a workspace, as shown in FIGURE 4-8:

1. *Click or tap* the **Announcement** tab in the **Workspace Item** menu.
2. *Click or tap* the **Name** of the desired announcement.
3. The **Announcement** will open. Each **Announcement** has a title area and some text below the title.

FIGURE 4-8: Announcements

4 - 2.2 Adding an Announcement to a Dashboard

To add an announcement to a dashboard, as shown in FIGURE 4-9:

1. *Click or tap* the **Announcement** to be added to a dashboard.
2. *Click or tap* the **Tools** button.

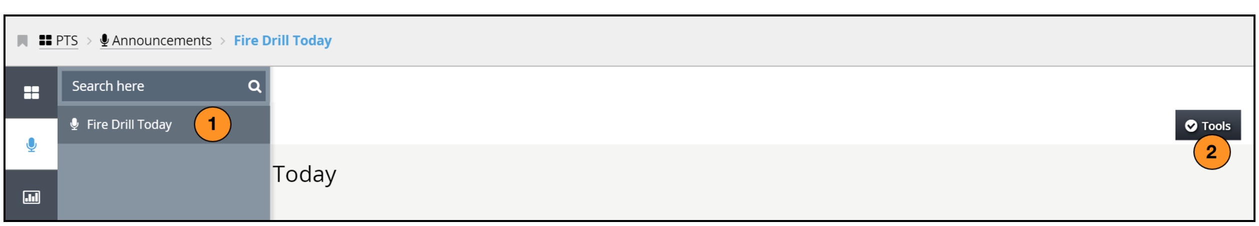


FIGURE 4-9: Tools Button

To continue adding the item(s) to a dashboard, as shown in FIGURE 4-10:

1. *Click or tap* the **circle** of the **Dashboard** that will receive the Announcement.
2. *Click or tap* the **Continue** button to confirm.

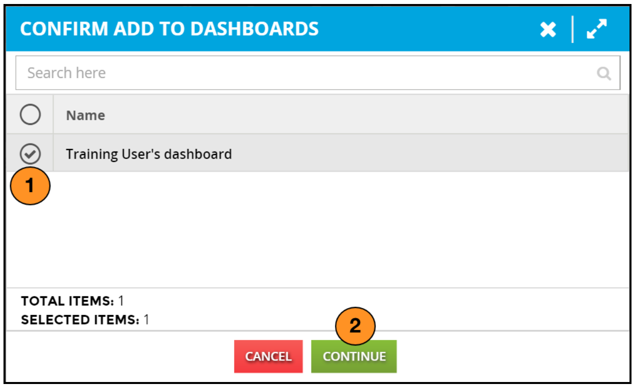


FIGURE 4-10: Add Announcement to Dashboard

4 - 3: Files

Files can be shared among all HC Standard® users who have been granted this permission by an HC Standard® Admin.

The file function allows access to important files, regardless of the specific computer being used. As long as the file has been uploaded and placed in the user's workspace and the computer being used has the software to open the specific file type, the file is accessible. Any file type can be uploaded to HC Standard®. At this time, only HC Standard® Admins may add a file.

4 - 3.1 Viewing a File

To view a file within a **Workspace**, as shown in FIGURE 4-11:

1. *Click or tap* the **File** tab in the **Workspace Item** menu.
2. *Click or tap* the **File name**.
3. The **File** will open or will provide the option to *download* the file.

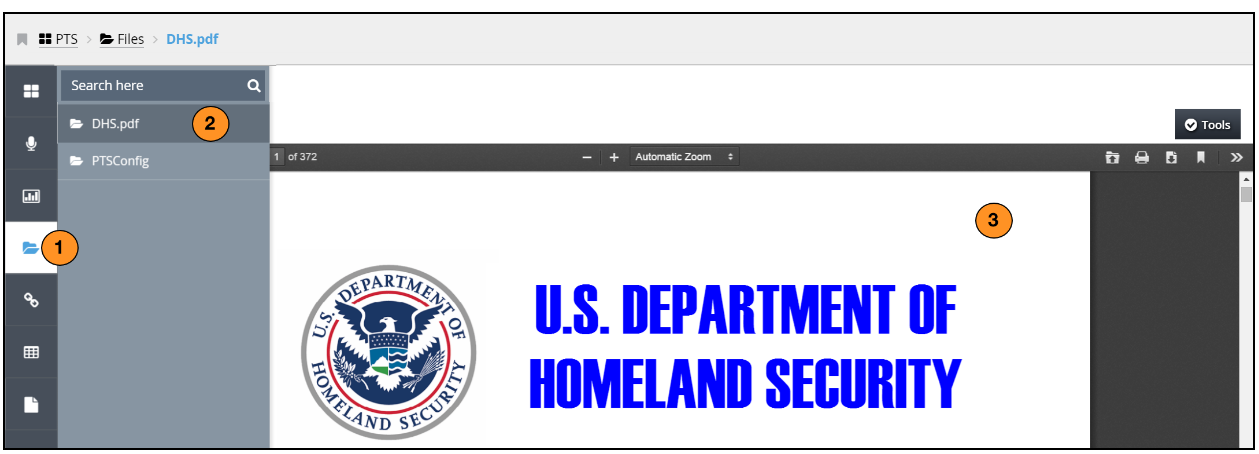


FIGURE 4-11: Files

4 - 3.2 Adding a File to a Dashboard

To add a file to a dashboard, as shown in FIGURE 4-12:

1. *Click or tap* the **File** to be added to a dashboard.
2. *Click or tap* the **Tools** button.

FIGURE 4-12: Tools Button

To continue adding the item(s) to a dashboard, as shown in FIGURE 4-13:

1. *Click or tap* the **circle** of the **Dashboard** that will receive the file.
2. *Click or tap* the **Continue** button to confirm.

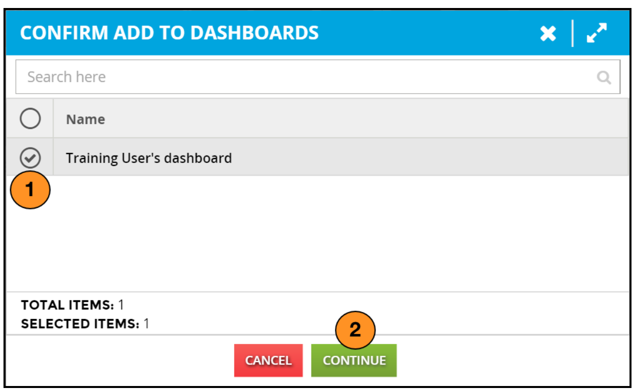
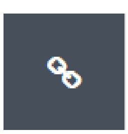


FIGURE 4-13: Add File to Dashboard

4 - 4: Links



Links allow for the posting of links to websites that may be needed by other users throughout the HC Standard® System.

Links are helpful in providing quick access to current web resources such as traffic reports, weather conditions, live video feeds, and local news reports. At this time, only Admins may create a link.

Note: Pop-up settings need to be enabled for the HC Standard® URL. To view all links, enable Mixed Content setting in the user's browser settings.

4 - 4.1 Viewing a Link

To view a link within a Workspace:

- *Click or tap* on the **Link** tab in the **Workspace Item** menu.
- *Click or tap* on the desired **Link**.
- Depending on how the link was configured, it may launch in a new window, or display in HC Standard®.

4 - 4.2 Adding a Link to a Dashboard

To add a link to a dashboard, FIGURE 4-14:

1. *Click or tap* the **Link** to be added to a dashboard.
2. *Click or tap* the **Tools** button.

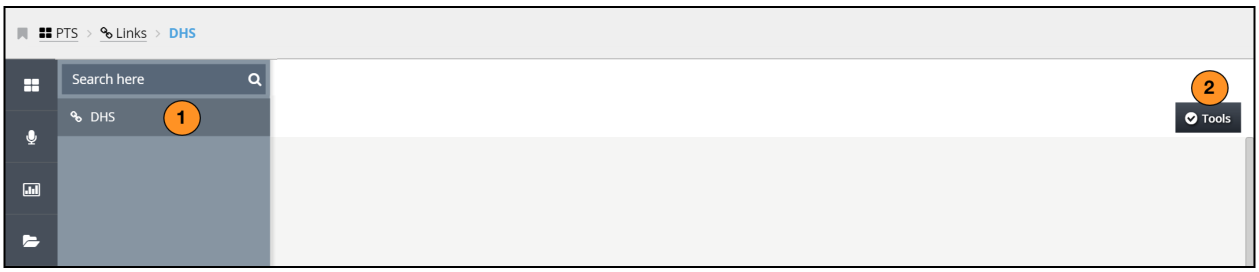


FIGURE 4-14: Tools Button

To continue adding the item(s) to a dashboard, as shown in FIGURE 4-15:

1. *Click or tap* the **circle** of the **Dashboard** that will receive the **Link**.
2. *Click or tap* the **Continue** button to confirm.

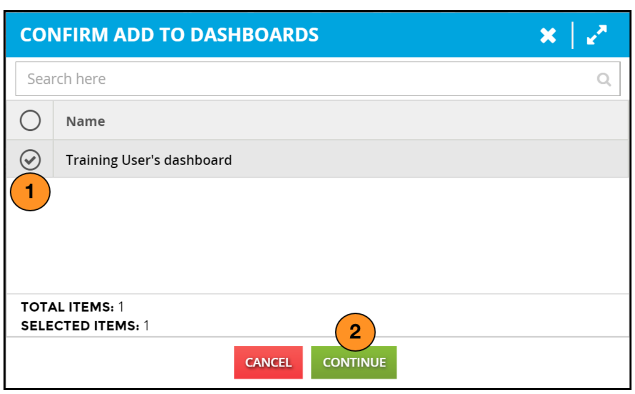


FIGURE 4-15: Add Link to Dashboard

4 - 5: Matrices

Matrices are the heart of the system because data is entered and updated here. The visualization of data also takes place here through the creation of reports, maps and charts.

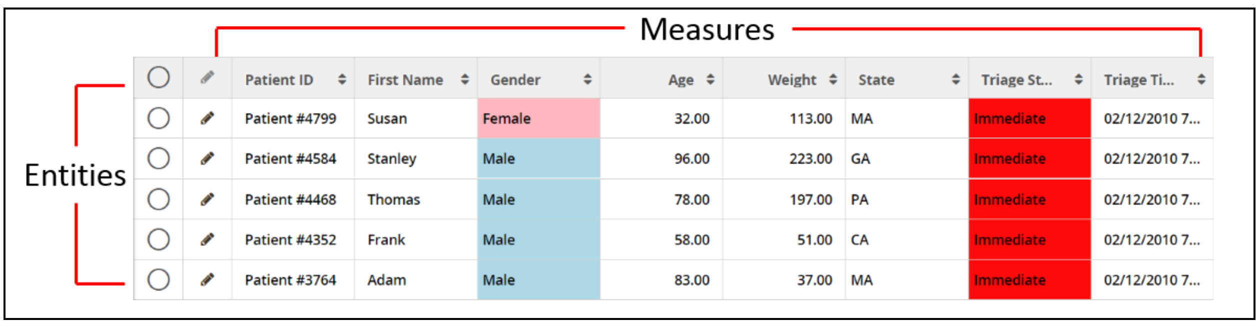
A **Matrix** is a view of the data in a grid format containing various **measures** for a specific set of **entities** or things.

Important! A working knowledge and understanding of this tool is required to be able to use the system.

Entity – Any *item* tracked in HC Standard®. Examples of an **Entity** include hospital, patient, medication, vehicle, bed, etc. An entity is literally anything an organization would want to track.

Measure – The information itself. For example, the quantity of *type A- blood* in a hospital entity is a measure.

FIGURE 4-16 shows patients as entities and their corresponding measures for demographic information and triage status.



		Patient ID	First Name	Gender	Age	Weight	State	Triage St...	Triage Ti...
		Patient #4799	Susan	Female	32.00	113.00	MA	Immediate	02/12/2010 7...
		Patient #4584	Stanley	Male	96.00	223.00	GA	Immediate	02/12/2010 7...
		Patient #4468	Thomas	Male	78.00	197.00	PA	Immediate	02/12/2010 7...
		Patient #4352	Frank	Male	58.00	51.00	CA	Immediate	02/12/2010 7...
		Patient #3764	Adam	Male	83.00	37.00	MA	Immediate	02/12/2010 7...

FIGURE 4-16: Example of Entities and Measures

Note: HC Standard® Admins create and update a matrix (e.g. add or remove measures). Users work in a matrix to add or update entity data.

---

4 - 6: Using a Matrix

To access a matrix from within a workspace, as shown in FIGURE 4-17:

1. *Click or tap* the **Matrices** tab in the **Workspace Item** menu.
2. *Click or tap* the desired **Matrix** name.

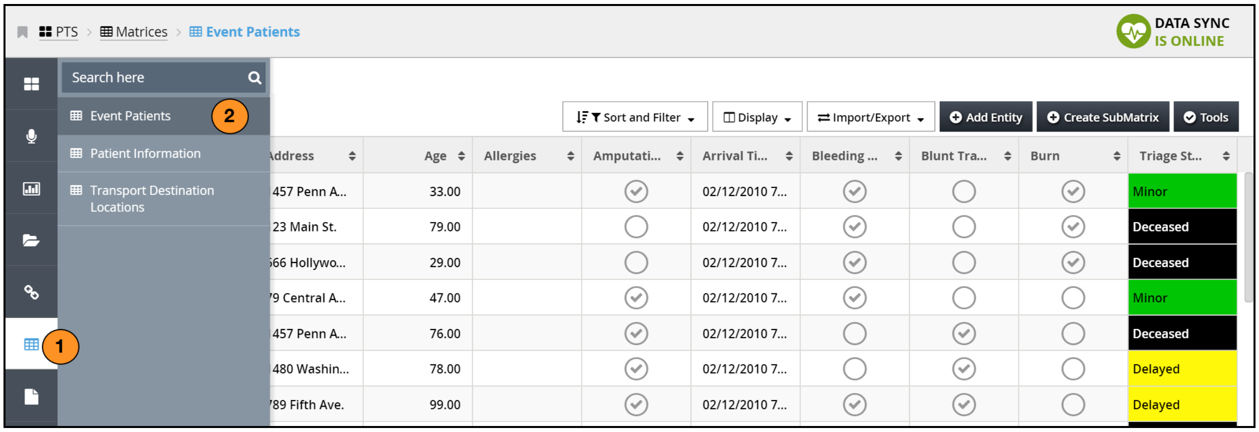


FIGURE 4-17: Select matrix from workspace item menu.

FIGURE 4-18 shows a matrix that contains information related to *patients*. The matrix includes data about each entity's (patient's) *Triage Status* and *Injuries*.

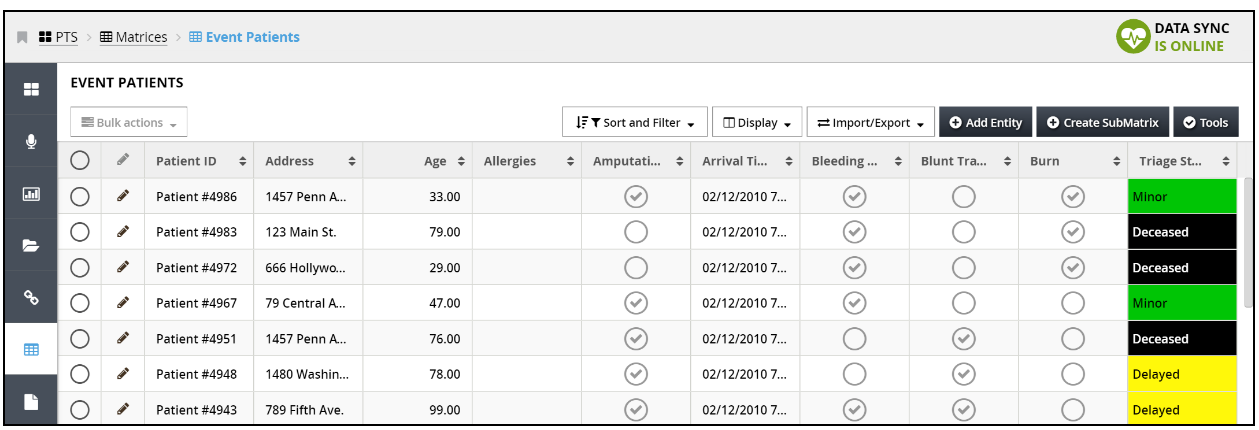


FIGURE 4-18: An open matrix

4 - 6.1 Adding a Record to a Matrix

To add an item to a matrix (if the user has appropriate permission), as shown in FIGURE 4-19:

1. *Click or tap* the **Add Entity** button.

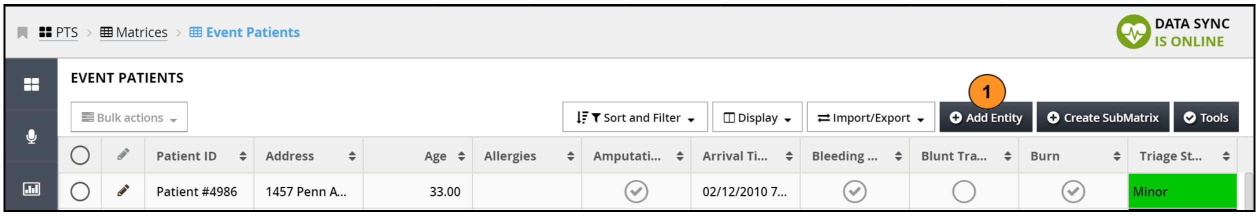


FIGURE 4-19: Add entity button

The **Add Matrix Item** window will be displayed, as shown in FIGURE 4-20.

1. *Enter* a unique entity **name or ID** (required) and any other information in the data fields provided.
2. *Click or tap* other **sections** to enter measure data as necessary.
3. *Click or tap* the **Cancel** button to abandon any changes.
   OR
4. *Click or tap* the **Save** button to add the **Entity** to the **Matrix**.
   OR
5. *Click or tap* the **Save and Next** button to add the **Entity** to the matrix and immediately begin entering a new one.

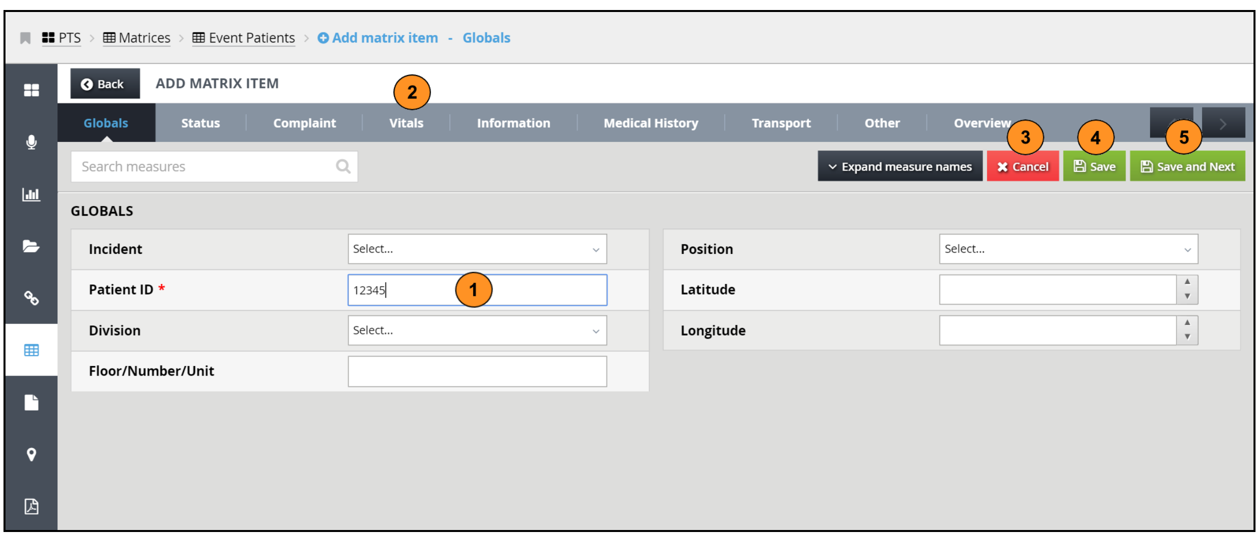


FIGURE 4-20: Add Matrix Item

4 - 6.2 Viewing and Editing Entity Data

To view or edit all entity data within a matrix, as shown in FIGURE 4-21:

1. *Double click or tap* the desired **Entity**.

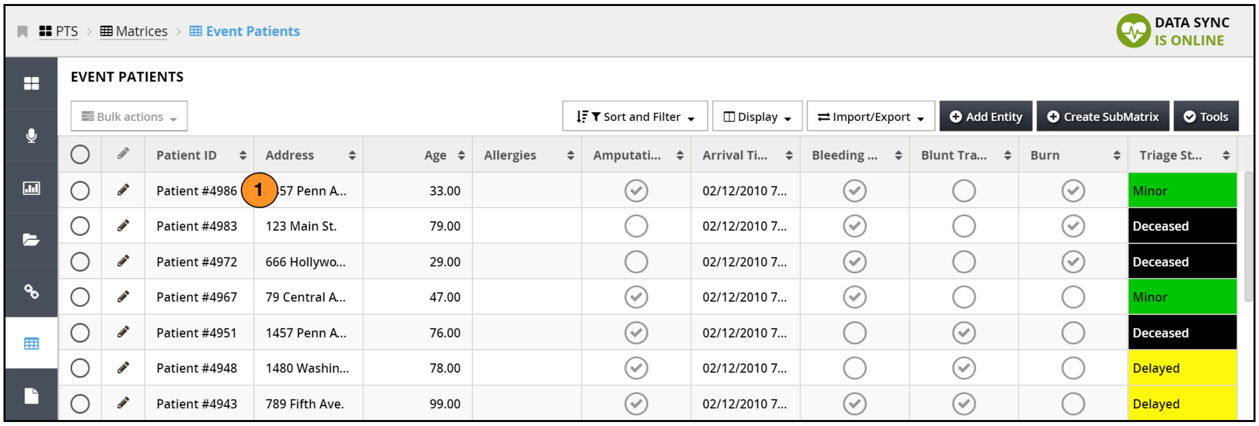


FIGURE 4-21: An open matrix

The entity view will open for the selected entity, as shown in FIGURE 4-22.

1. Navigate back to the matrix view by *clicking or tapping* in the navigation bar or the browser **Back** button.
2. Users can toggle between entity views by *clicking or tapping* in the entity views row on the right side of the view.

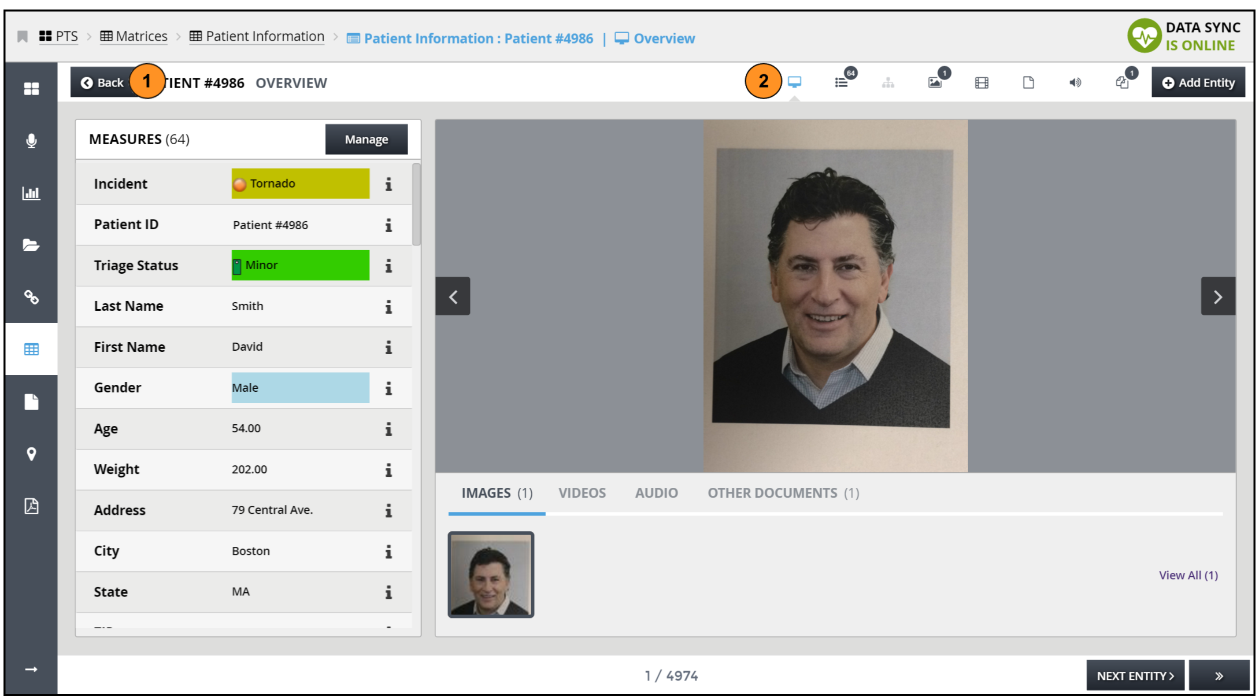


FIGURE 4-22: Entity View Navigation

To enter edit mode and update entity data, as shown in FIGURE 4-23:

1. *Click or tap* the **Manage** button.
   OR
2. *Click or tap* the **measures** entity view icon in the entity view row.

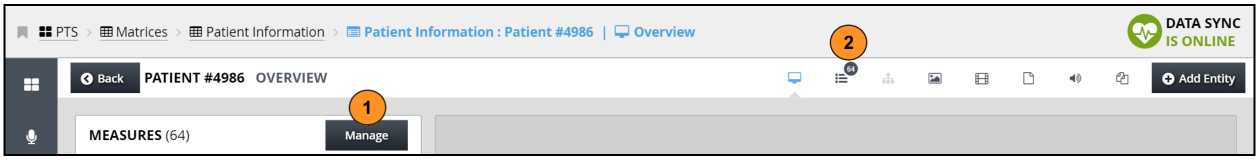


FIGURE 4-23: Entity View

The entity view will display all measures by section for the selected entity, as shown in FIGURE 4-24.

1. *Click or tap* the **Edit** button.

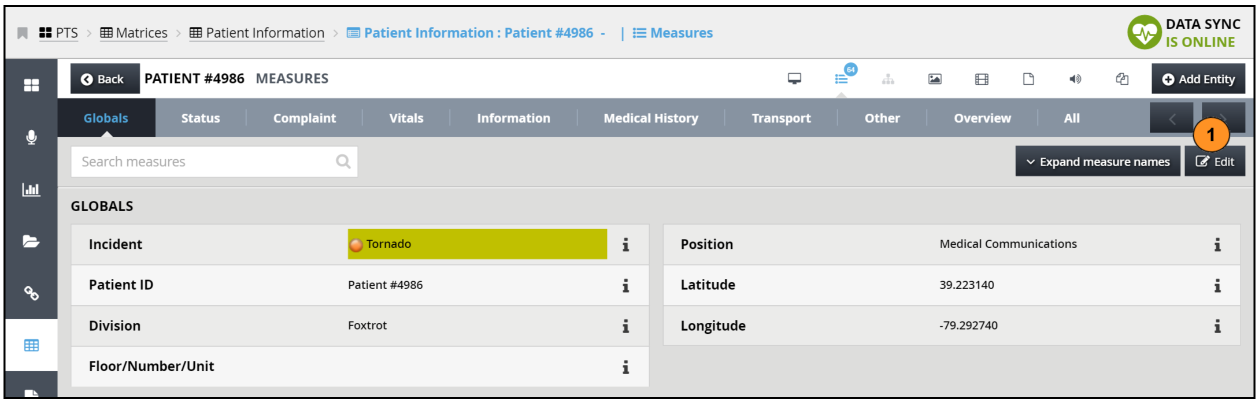


FIGURE 4-24: View Entity - Measures

Update the entity, as shown in FIGURE 4-25:

1. *Enter* data for each measure, as desired.
2. *Select* other sections for additional measures.
3. *Click or tap* the **Cancel** button to abandon any changes.
4. *Click or tap* the **Save** button to save any changes.
5. *Click or tap* the **Save and Next** button to save any changes and move to the next entity in the matrix to edit.

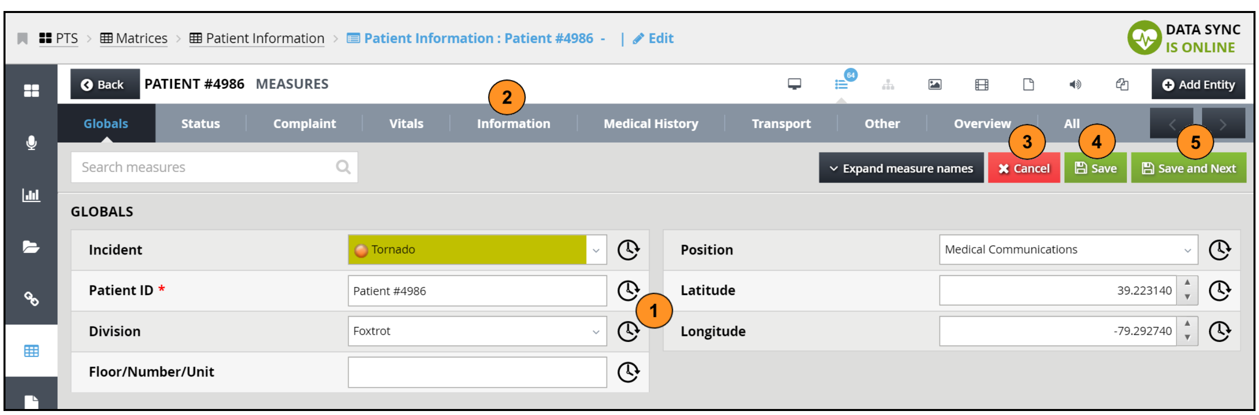


FIGURE 4-25: Edit Entity Measure View

Every time a user updates a data field for an entity, a time stamp is applied to let other users know when the data was updated. Occasionally users may be requested to verify that certain data is up-to-date. In these instances, if the current data is accurate, users may update the timestamp to reflect the data as being current.

To update the timestamp so that the data is marked as current, as shown in FIGURE 4-26:

1. *Click or tap* the **clock** icon next to the measure(s) to be marked as current. These items will turn green.
2. *Click or tap* the **Save** button to confirm any changes made.

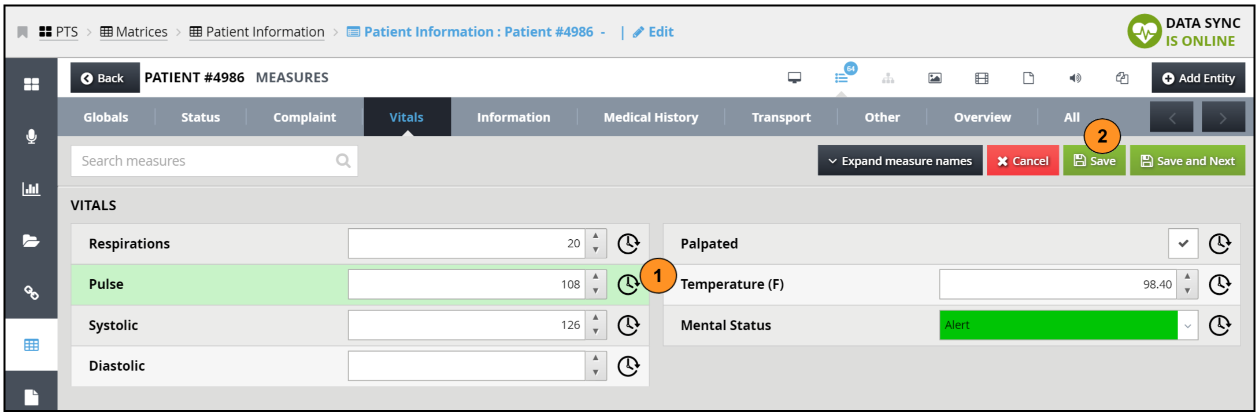


FIGURE 4-26: Mark as Current Button and Save Button

To view the timestamp on data while in the measure entity view, as shown in FIGURE 4-27:

1. *Click or tap* the **i** icon next to the measure.

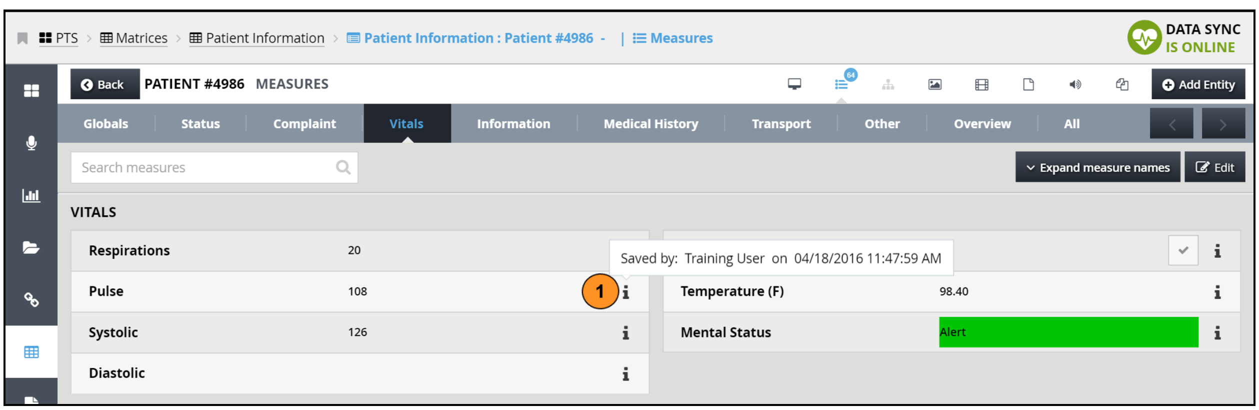


FIGURE 4-27: Timestamp for entity data

Timestamp data includes the last user to update the data and the date and time.

4 - 6.3 Adding GPS Coordinates to an Entity

Using a desktop browser, such as Google Chrome, Mozilla Firefox, Microsoft Edge, or Microsoft Internet Explorer, users can automatically add Latitude and Longitude GPS coordinates to an entity record. HC Mobile Patient Tracking™ captures the latitude and longitude where the patient was scanned, but if the user needs to update the latitude and longitude from the web or if an entity is being created in the web application, this section discusses how to add or update the GPS coordinates.

The first time a user attempts to add GPS coordinates from their desktop browser, the user will receive a browser specific pop up confirming permission to track Location/GPS in HC Standard, as shown in FIGURE 4-28.

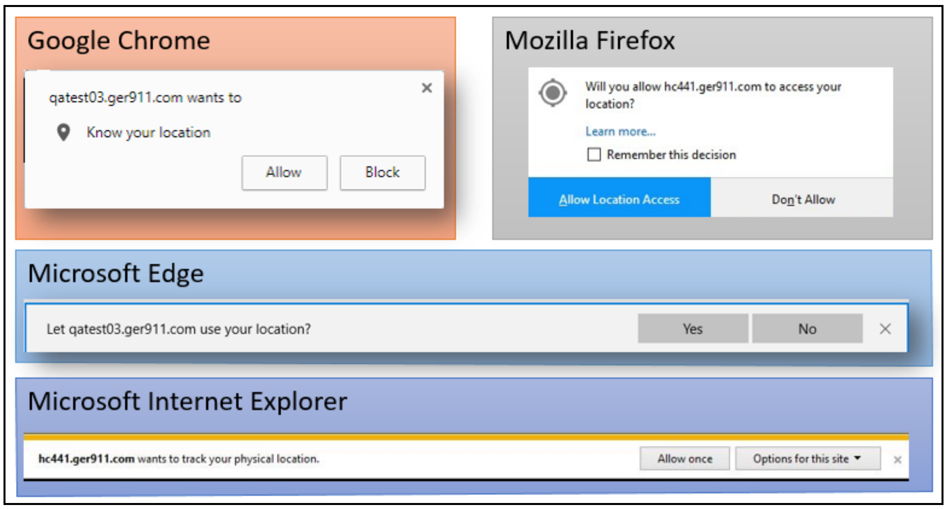


FIGURE 4-28: Desktop browser location permission pop ups

Add GPS coordinates using the GPS icon  from the edit mode in an entity record, as shown in FIGURE 4-29:

1. *Click or tap* the **GPS icon** for Latitude.
2. *Click or tap* the **GPS icon** for Longitude.
3. *Click or tap* **Save** when complete.

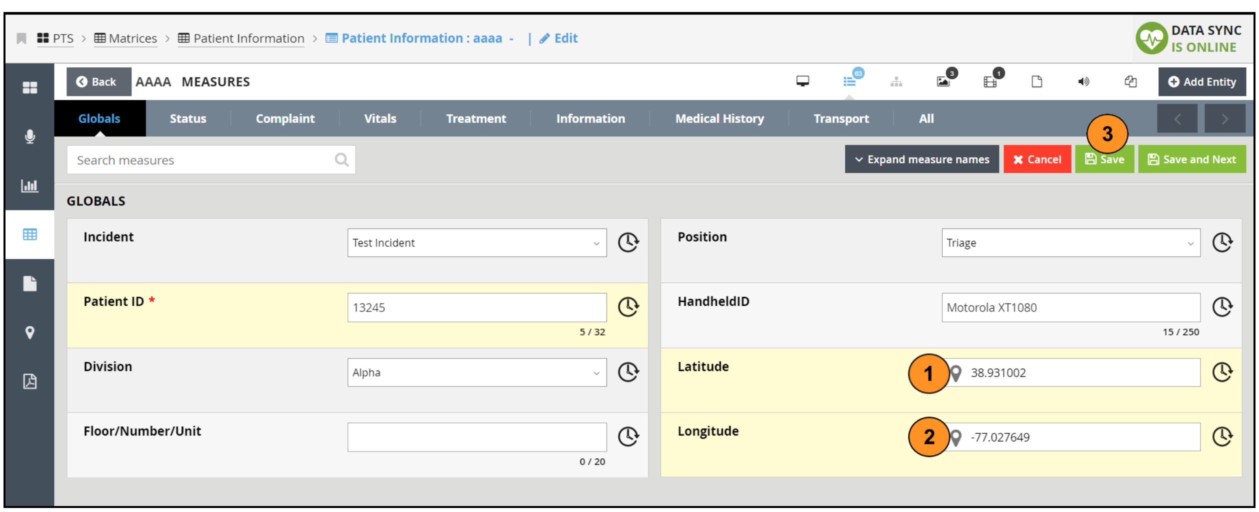


FIGURE 4-29: Add GPS Coordinates

4 - 6.4 Manage Entity Files

An entity may contain additional files, such as patient injury images. Each entity view button will show a filtered type view.

Change entity file views, as shown in FIGURE 4-30:

1. *Click or tap* an **entity file view** to filter to a specific file type.

Each display button will show entity files in a different manner.

2. **Image Preview** - File icons are displayed along the bottom row with a large preview above.
3. **List** - Files are displayed in a list with file size and date uploaded. Files may be downloaded from this view.
4. **Grid** - Files are arranged in a grid for quick display.

FIGURE 4-30: Entity File Views

To upload an entity file, as shown in FIGURE 4-31:

1. *Click or tap* an **entity file view** icon.
2. *Click or tap* the **Upload Files** button.

FIGURE 4-31: Entity View - Upload File

Selecting this button will display the **Upload Files** tool, showing the files on the local hard drive that can be selected for upload, as shown in FIGURE 4-32. To upload a file:

1. *Click or tap* on the **Choose Files** or **Browse** button. *Navigate* to the location where the newly uploaded file is stored. *Select* the newly uploaded file and *click or tap* the **Open** button. Alternatively, files can be *dragged & dropped* into the browser window to select the file for upload.
2. *Click or tap* the **X** to remove the file, if the wrong file was selected.
3. *Click or tap* the **Upload All** button to upload the file(s).

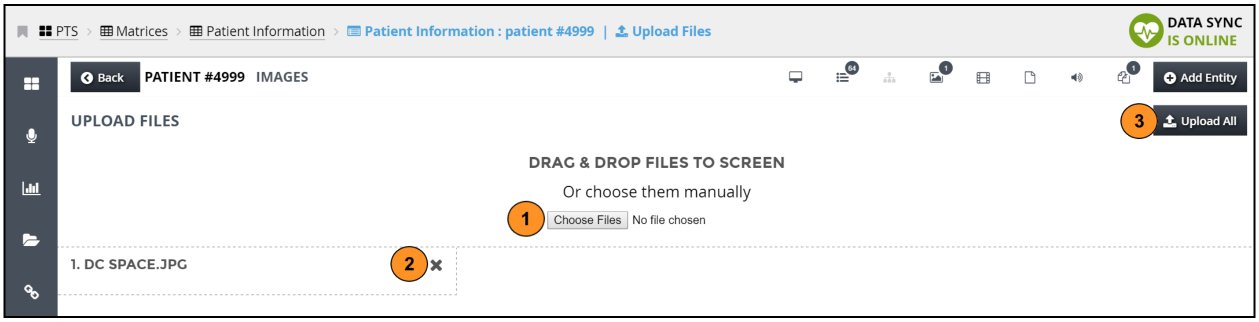


FIGURE 4-32: Entity View - Upload

To delete an entity file, as shown in FIGURE 4-33:

1. *Click or tap* a **file**.
2. *Click or tap* the **Remove Selected** button and *confirm* the action.

FIGURE 4-33: Entity View - Delete File

4 - 6.5 Edit Multiple Entities

To quickly edit multiple entities at the same time, as shown in FIGURE 4-34:

1. *Click or tap* the **circle** to the left of the desired entities.
2. *Click or tap* the **Bulk actions** button.
3. *Click or tap* **Edit**.

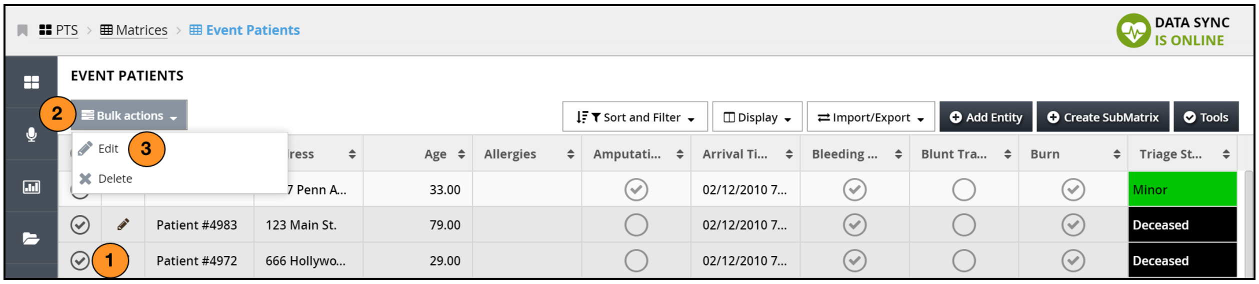


FIGURE 4-34: Bulk Actions Button

Select the measures to update, as shown in FIGURE 4-35:

1. *Click or tap* the **square** for each desired measure.
2. *Click or tap* **Next** to continue.

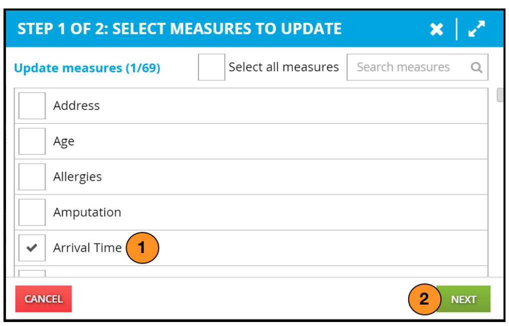


FIGURE 4-35: Edit Multiple - Measures

Enter the values for each measure, as shown in FIGURE 4-36:

1. *Enter* desired value.
2. *Click or tap* **Submit**.

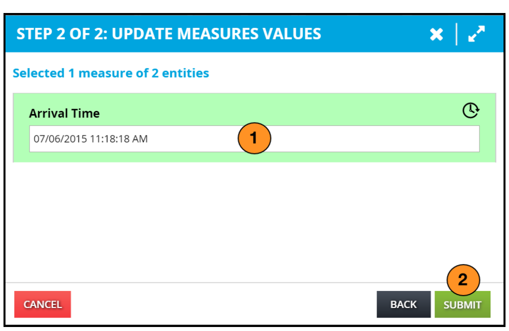


FIGURE 4-36: Edit Multiple - Measure Values

The measure values will be updated for the selected entities. *Click or tap* the **OK** button after the confirmation prompt appears.

4 - 6.6 Deleting Entities

To delete an entity from the matrix view (if the user has appropriate permission), as shown in FIGURE 4-37:

1. *Click or tap* the **circle** to the left of the desired entities.
2. *Click or tap* the **Bulk actions** button.
3. *Click or tap* **Delete**.

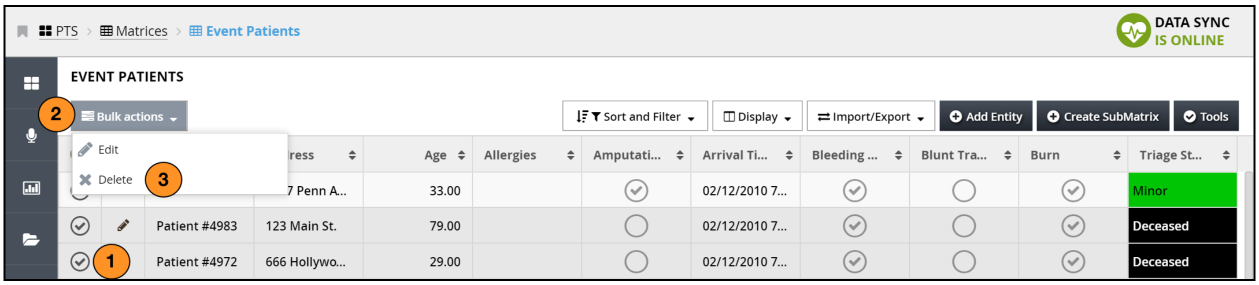


FIGURE 4-37: Bulk Actions Button

Continue deleting the item(s), as shown in FIGURE 4-38:

1. *Click or tap* the **Yes** button to confirm the deletion.

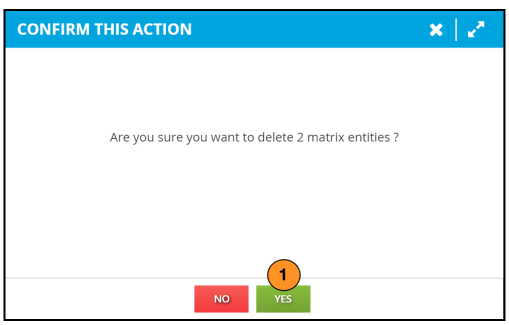


FIGURE 4-38: Delete

This removes the selected **Entities** from the matrix.

Important! Deleting an entity is permanent and there is no way to undo the action.

4 - 6.7 Display Measures

The **Display** button is used to change measure display options in a matrix. All changes made will persist between user sessions. A user may reset any custom changes to measure display options in all matrices from the **User Profile**.

To display only a subset of measures or change measure order, as shown in FIGURE 4-39:

1. *Click or tap* the **Display** button.
2. *Click or tap* the **circle** to the left of each measure to be shown or temporarily hidden from display. A **checked circle** indicates that the measure will be displayed. The absence of a checkmark indicates that the measure will be hidden from display.
3. *Click or tap* **Display All** to quickly show all measures. *Click or tap* a second time to quickly hide all measures.
4. *Click and hold* or *tap and hold* on the **3 bars** to the right of each measure name to change the order of measures in the matrix. Measures may also be ordered directly on the matrix.
5. *Click or tap* **Reset** to reset the measures back to original settings.

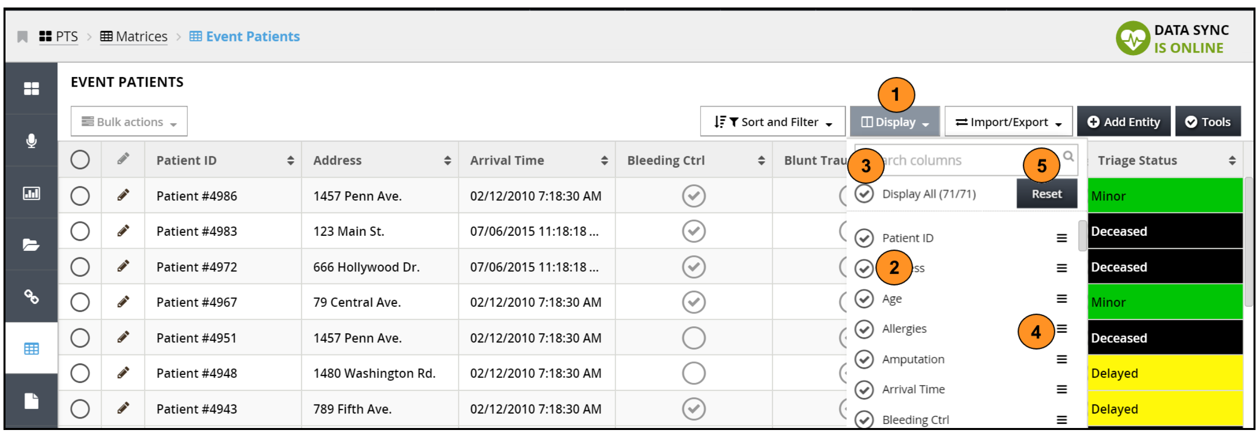


FIGURE 4-39: Display Measures

4 - 7: Sorting and Filtering Matrix Data

4 - 7.1 Sorting a Matrix

Sorting allows data to be viewed in a more comprehensible view. For example, a hospital receiving patients may want to group the incoming patients based on triage status.

Matrices may be *sorted* by any column in the table. FIGURE 4-40 shows an ascending sort applied to the Age measure. To toggle between sorting in ascending and descending order:

1. *Click or tap* the column header. A small **arrow** pointing up or down, on the right side of each column, indicates the selected order. *Click or tap* the column header a third time to clear sorting.

To sort a matrix using the **Sort and Filter** button:

2. *Click or tap* the **Sort and Filter** button.

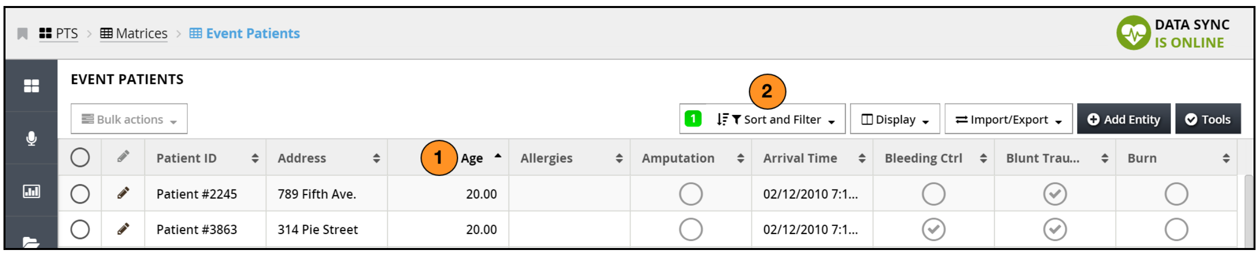


FIGURE 4-40: Ascending Sort applied to Age measure.

When chosen, the **Sort and Filter** options appear over the open matrix view, as shown in FIGURE 4-41

1. *Select* the measure to sort from the **Sorting** drop-down menu.
2. *Select* the order to sort in from the **Direction** drop-down menu.
3. *Click or tap* the **plus** button to the right of the new sort option.
4. *Click or tap* the **APPLY** button to confirm any changes made.

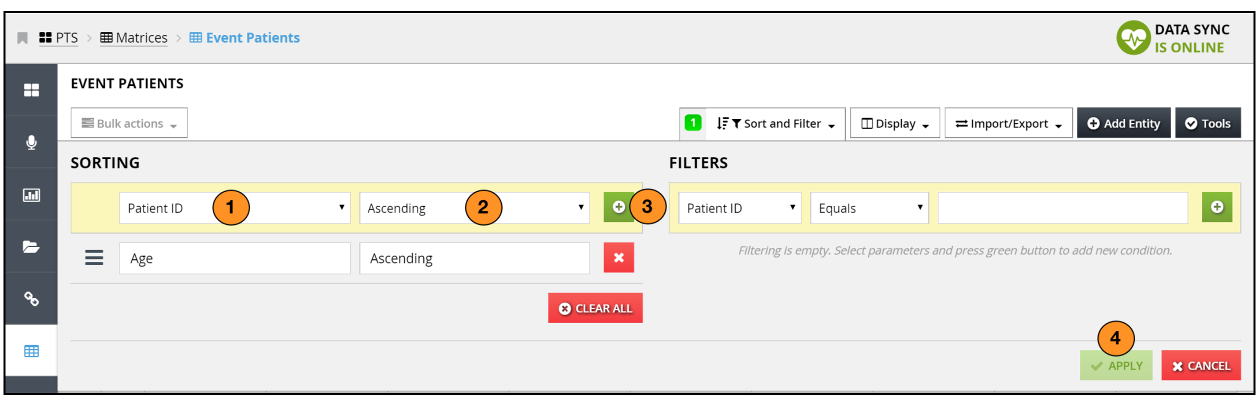


FIGURE 4-41: Sorting Options

4 - 7.2 Filtering a Matrix

To filter a matrix using the **Sort and Filter** button, as shown in FIGURE 4-42:

1. *Click or tap* the **Sort and Filter** button.

When this option is chosen, the **sort** and **filter** options appear.

2. *Select* the measure to filter from the **Filters** drop-down.
3. Select the **filter type** from the drop-down.
4. *Enter* the filter **criteria** that appears.
5. *Click or tap* the **plus** button.
6. Optional: *Add* additional measures for compound filtering then *click or tap* the **AND** or **OR** button.
7. *Click or tap* the **APPLY** button to confirm any changes made.

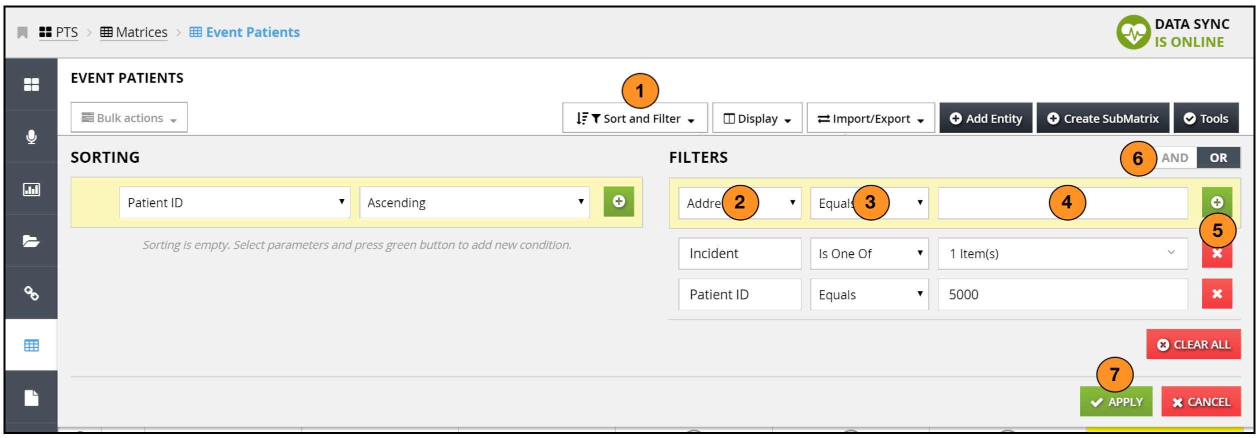


FIGURE 4-42: Matrix Filter

In FIGURE 4-43, the value "45" has been entered for Age. By adding this filter, only patients who are *greater than or equal to* the value "45" will be displayed.

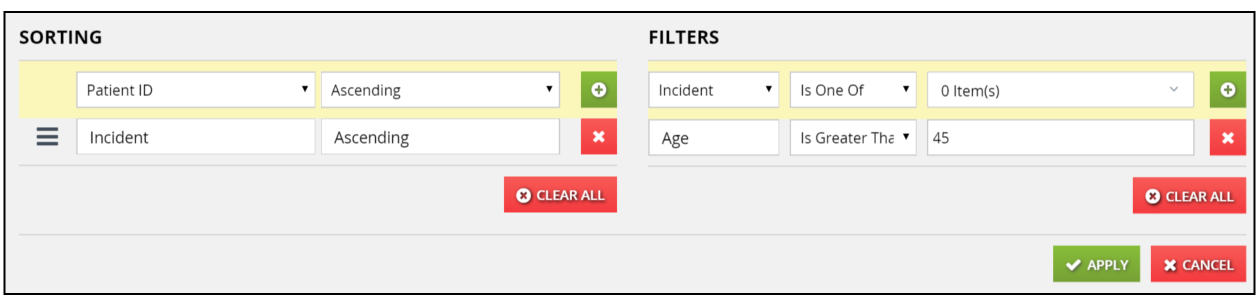


FIGURE 4-43: Greater than or equal to 45 Filter set on the Measure Age

Columns with lists of choices can be filtered by those choices using a drop-down list, as shown in FIGURE 4-44.

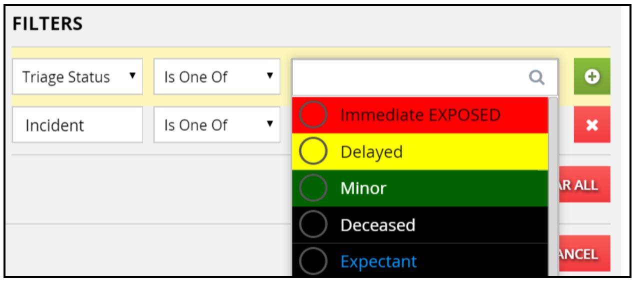


FIGURE 4-44: Drop-Down List in a Matrix Filter

To filter a **checkbox** measure, as shown in FIGURE 4-45:

1. *Click or tap* once on the **circle** to display all the entities with data that match.

FIGURE 4-45: Checkbox Filter

To *clear* one or all filters, as shown in FIGURE 4-46:

1. *Click or tap* the **Sort and Filter** button.
2. *Click or tap* the **X** button to remove one filter.
3. *Click or tap* the **Clear All** button to remove all filters at once.
4. *Click or tap* the **Apply** button to confirm any changes made.

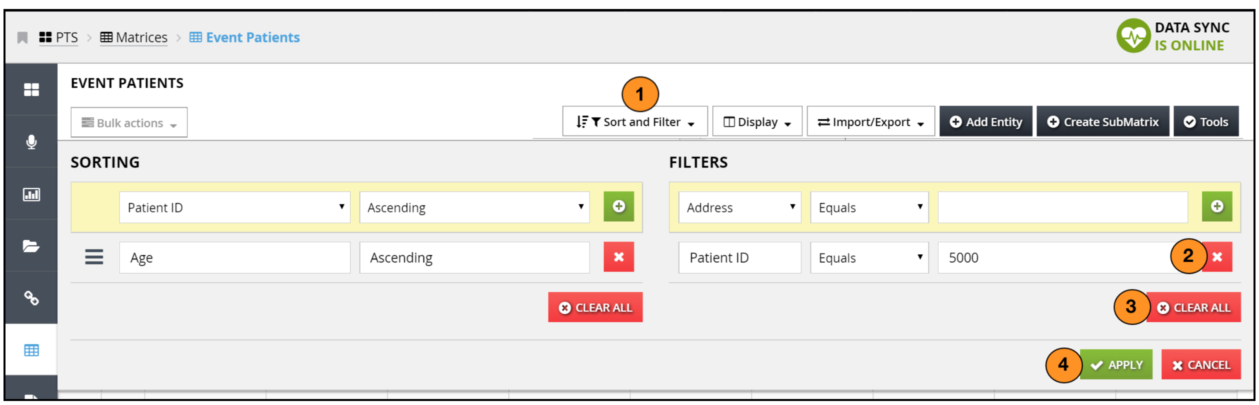


FIGURE 4-46: Clear All Filters button

4 - 7.3 Searching Within a Matrix Using Filters

Filters aid in efficiently locating specific entities. For example, if a transport officer needed to know where a specific patient was sent, the patient's record could be quickly found by filtering information by Patient ID or patient's name.

The **filter** tool allows for the filter/search against multiple values on all of the information that is being presented, as shown in FIGURE 4-47:

1. *Click or tap* the **Sort and Filter** button.
2. *Select* the **measure** to search against.
3. *Select* the **filter type**.
4. *Input* the search **criteria**.
5. *Click or tap* the **Add Expression** button.
6. *Click or tap* the **Apply** button to save any changes made.

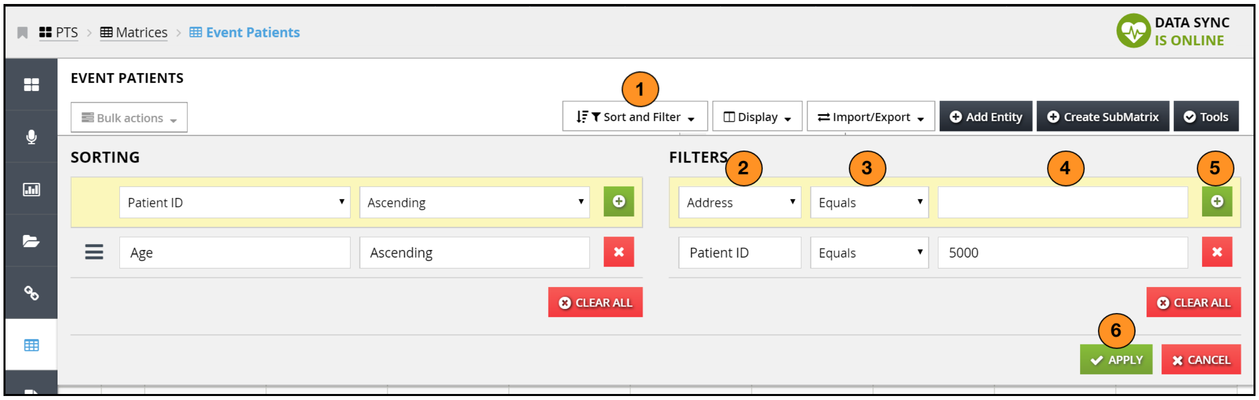


FIGURE 4-47: Filter Options

4 - 8: Exporting Matrix Data

Data may be *exported* from a matrix as a **.CSV file type** (this is Excel compatible). When exporting a matrix, all the data that is currently viewable will be exported. To change what data will be exported, create a filtered view or show/hide certain measures.

To **Export** matrix data, as shown in FIGURE 4-48:

1. *Click or tap* the **Import/Export** button.
2. *Click or tap* **Download CSV** to download a CSV file of the matrix.

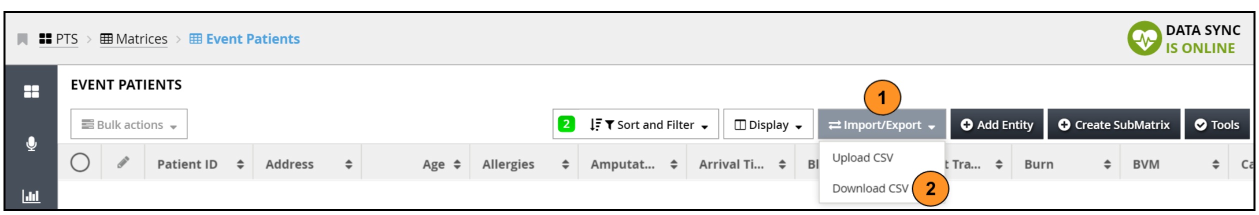


FIGURE 4-48: Export a Matrix

The CSV file will be downloaded to the user's computer or device.

4 - 9: Importing Matrix Data

It may be useful to place items currently being tracked with other computer-based programs, including Excel® (that have been converted to CSV format), into HC Standard®.

To **Import** matrix data, as shown in FIGURE 4-49:

1. *Click or tap* the **Import and Export** button.
2. *Click or tap* **Upload CSV** to import a CSV file to the matrix.

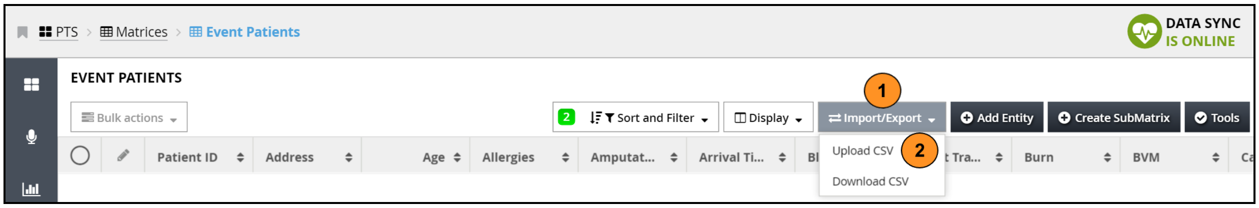


FIGURE 4-49: Import a matrix

To continue the import process, as shown in FIGURE 4-50:

1. *Drag and drop* the **file** into the window that appears or *click and tap* the **Choose Files** or **Browse..** button to manually upload the file.
2. *Check* **Skip errors** to upload data that does not have errors. Leaving this *unchecked* will cause the upload to fail and list the errors present.
3. *Check* **Allow import to change records so they are no longer visible in current filter** to allow data changes that may move entities out of the current filtered view.
4. *Click or tap* the **Upload** button to start the import process.

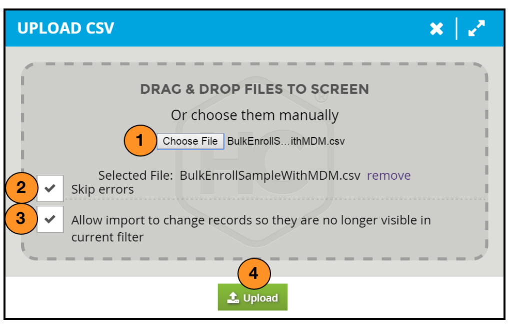


FIGURE 4-50: Upload CSV

The user will receive a notification when the import is complete along with the number of errors, if any. FIGURE 4-51 below shows an upload status notification.

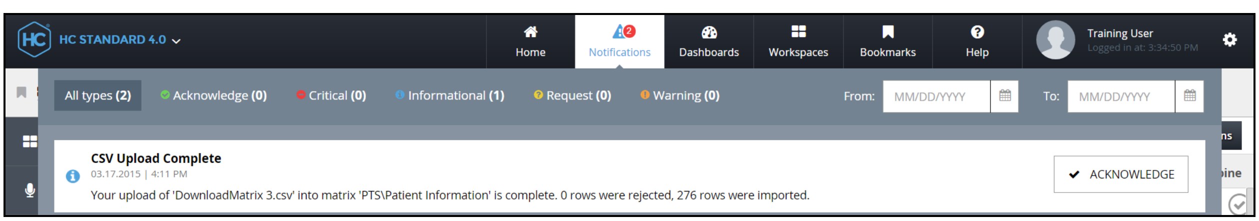


FIGURE 4-51: Import status notification

Note: The column names on the .CSV file must match up to the measure names in the matrix. These measure names may actually be different than what is displayed in the matrix, which will be indicated on an error report after attempting to import the file.

4 - 10: Creating a Submatrix

4 - 10.1 Design and Save a Submatrix

Users with the appropriate permission may be able to create a submatrix for any matrix in a workspace. These submatrices may be shared with other users in the workspace, or created privately for the user.

Important! Once created, a submatrix can only be edited or removed from Admin mode.

To create a submatrix, as shown in FIGURE 4-52:

1. From the desired parent matrix, customize the matrix by *adding* **sort**, **filter** or **measure display** options.
2. *Click or tap* the **Create Submatrix** button.

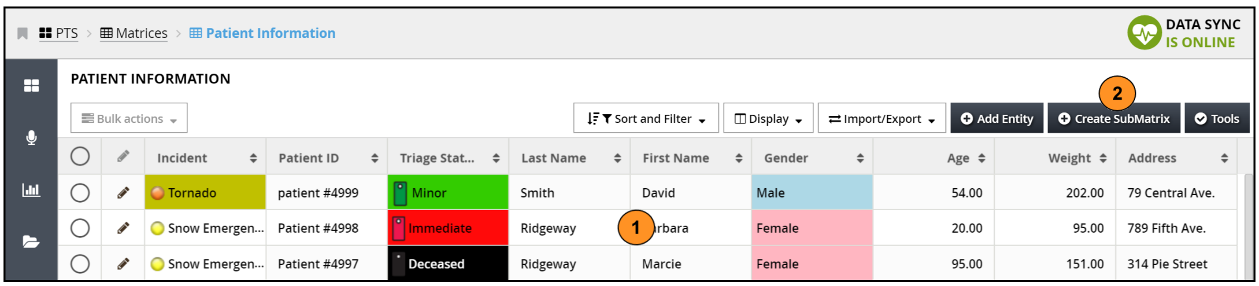


FIGURE 4-52: Create Submatrix

Edit the submatrix options, as shown in FIGURE 4-53:

1. *Enter* a **name**.
2. *Enter* a **description**, if desired.
3. *Check* **Is Private** to make the submatrix only available to the user creating it.
4. *Check* **Display All Measures** to have all measures displayed by default.
5. *Select* the **Default View** when a user views an entity's details.
6. *Click or tap* the **Measures** tab to make any changes to measure options.
7. *Click or tap* the **Sorting** tab to make any sorting changes.
8. *Click or tap* the **Filtering** tab to make any changes to filters applied to the submatrix.
9. *Click or tap* **Save** to save the submatrix.
10. *Click or tap* **Back** tab to abandon the Add SubMatrix tool.

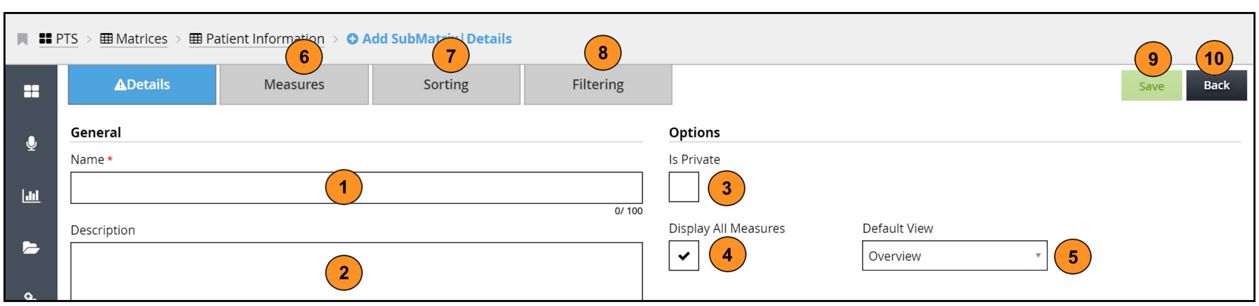


FIGURE 4-53: Create Submatrix Options

Once saved, a submatrix will be available from the matrices list under the workspace. All changes to submatrices must be performed from Admin mode.

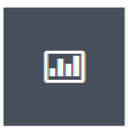
4 - 11: Adding Data to a Matrix

Data may be added to HC Standard® using the following methods:

- Updating matrices *manually* can be done with the appropriate permission. **Entities** can be created and data can be added to each **measure**. For more information, see "Using a Matrix" on page 25.
- **Forms** may be used as an alternate interface to add data to a matrix, see "Forms" on page 49.
- HCS® Mobile Handheld devices may add and modify data in Patient Information Matrices.
- Information can *automatically* be retrieved from existing databases. Once set up, HC Standard® automatically retrieves the data at predetermined intervals and does not require manual updating.

Note: Data may be updated within a matrix, but the structure of the matrix (add new measures or remove existing measures) ***may not*** be updated without Admin privileges.

4 - 12: Charts



HC Standard® provides the ability to view live matrix data in graphical, **chart** form.

The HC Standard® Admin may provide several charts in a workspace to be viewed at any time.

4 - 12.1 Viewing Matrix Charts

To view a chart within a **Workspace**, as shown in FIGURE 4-54:

1. *Click or tap* the **Chart** tab in the **Workspace Item** menu.
2. *Click or tap* the desired chart **Name**.
3. The selected **Chart** will be displayed.

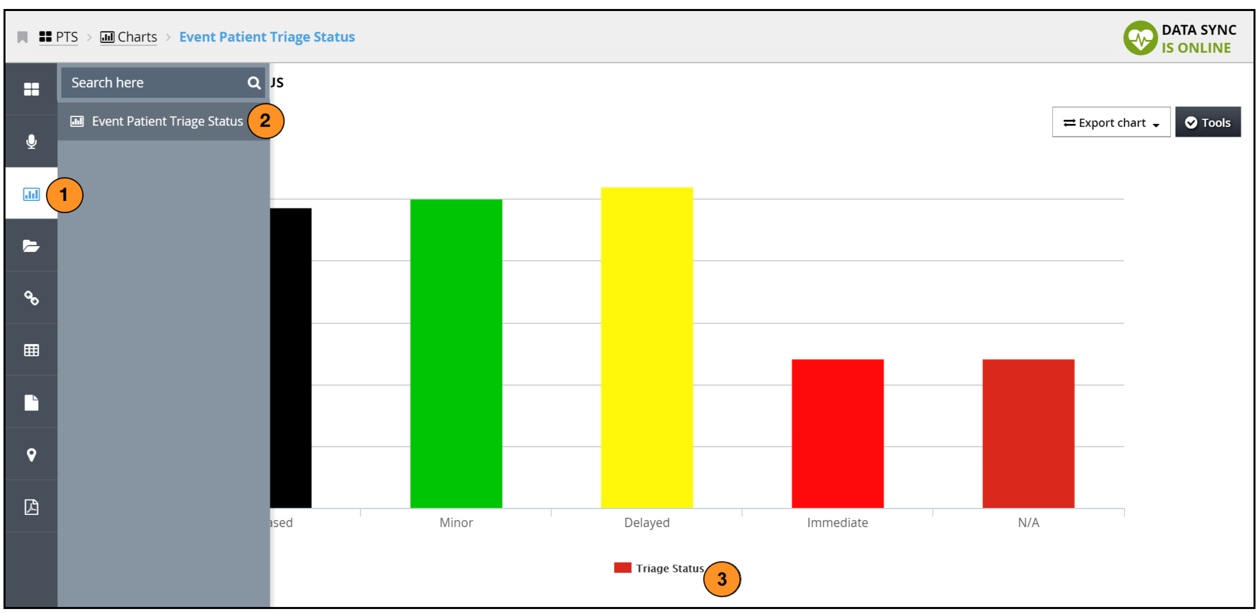


FIGURE 4-54: Chart

4 - 12.2 Exporting a Chart

To export or print a chart for archival purposes, FIGURE 4-55:

1. *Click or tap* on the **Export chart** button.
2. *Click or tap* on the **File Type** to save the chart in that format or *click or tap* the **Printer** item for printing options. The chart will automatically print or download in the file type specified.

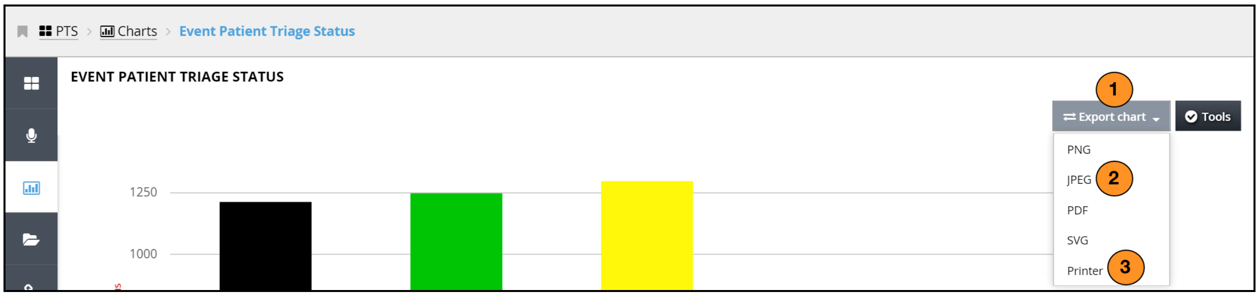


FIGURE 4-55: Export chart options.

4 - 12.3 Adding a Chart to a Dashboard

To add a chart to a dashboard, as shown in FIGURE 4-56:

1. *Click or tap* the **Chart** to be added to a dashboard.
2. *Click or tap* the **Tools** button in the top right-hand corner of the screen.

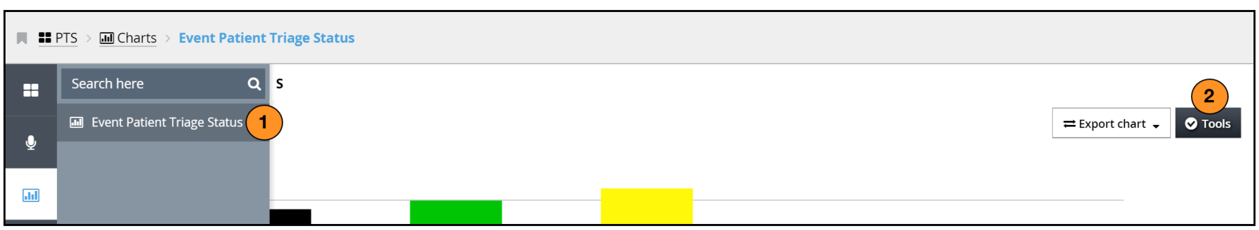


FIGURE 4-56: Tools Button

To continue adding the item(s) to a dashboard, as shown in FIGURE 4-57:

1. *Click or tap* the **circle** of the **Dashboard** that will receive the chart.
2. *Click or tap* the **Continue** button to confirm.

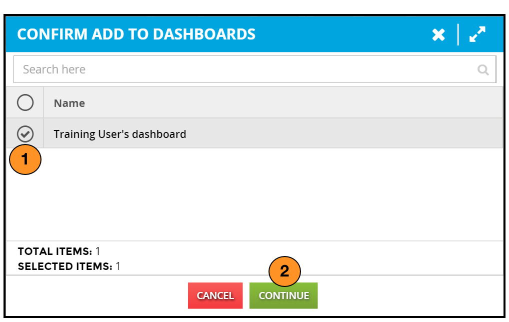
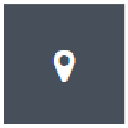


FIGURE 4-57: Add Chart to Dashboard

4 - 13: Maps



Maps display matrix information that includes GPS coordinates in a visual map representation.

Maps show where entities are located. Data is displayed as icons to associate the data that has been collected with geographical locations.

For example, a **Map** may show the location of patients by triage category, where O+ blood is located, where relief supplies are located, or where evacuees are being housed.

At this time, only HC Standard® Admins may create a map.

The icons on the map are defined by the HC Standard® Admin. The icon may be associated with a particular property (location of icon) and quantity (relative size of icon). Controls for panning and zooming in/out are available within the map.

4 - 13.1 Viewing a Map

To view a map from within a Workspace, as shown in FIGURE 4-58:

1. *Click or tap* the **Map** tab in the **Workspace Item** menu.
2. *Click or tap* the desired map **Name**.

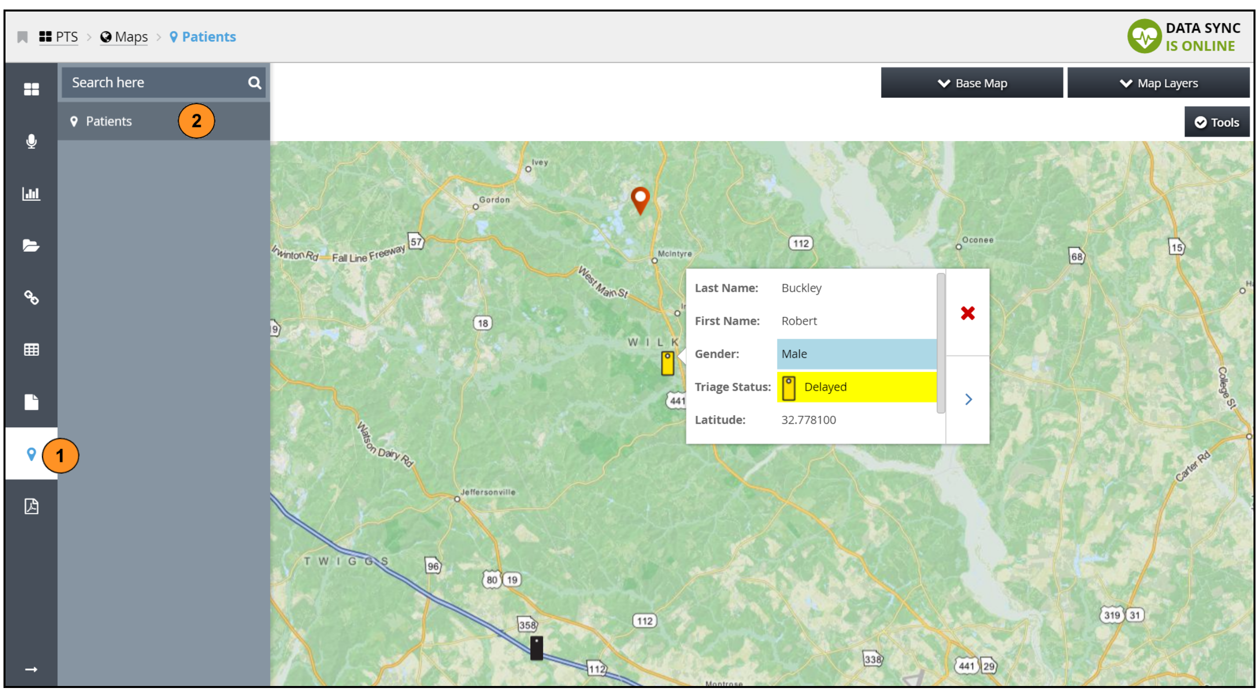


FIGURE 4-58: Map

4 - 13.2 Map Controls

The following controls are available when viewing a map:

- **Zoom:** There are many ways to zoom the map. A zoom in and out icon is displayed and may be *clicked or tapped*. Another way to zoom in is to *double click or tap* the map at the location desired to zoom. Also, if using a computer mouse with a scroll wheel, *click* once on the map and then *use* the *scroll wheel* to zoom in and out. Tablet users may zoom by *making a pinch gesture* over the map.
- **Pan:** *Click or tap* on the map and *drag* to pan across the map.
- **Viewing data within a map:** By *clicking or tapping* any icon on a map, matrix data will be displayed that corresponds with that item. The data displayed is controlled by an Admin.

4 - 13.3 Base Map Options

Additional base map options are included with each map. These options may include satellite views, black and white map views, and other mapping systems (e.g. Open Maps, Map Quest). These options only change the visual aesthetic of the map and does not affect data within a map.

To select a base map option, as shown in FIGURE 4-59:

1. *Click or tap* the **Base Map** button.
2. *Click or tap* each **item** to select the option.

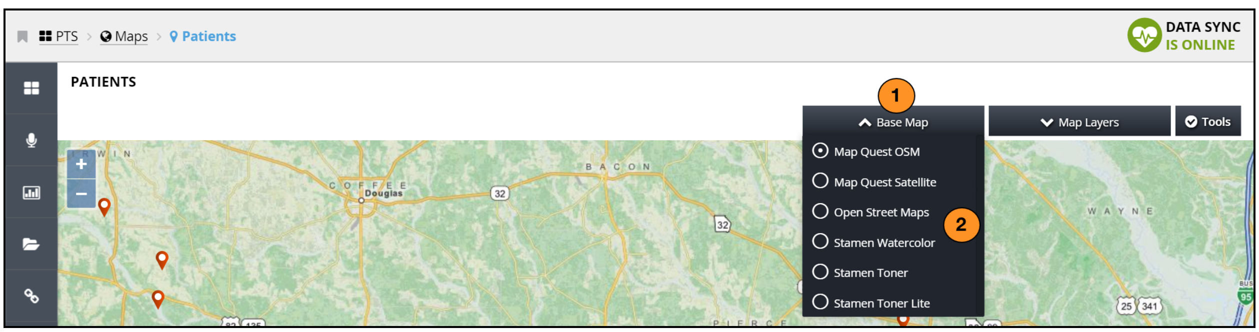


FIGURE 4-59: Base Map Options

4 - 13.4 Map Layers

Helpful map overlays may be added in addition to matrix data. Layers may include weather radar, geological fault lines, or even time zone references.

To toggle a map layer, as shown in FIGURE 4-60:

1. *Click or tap* the **Map Layers** button.
2. *Click or tap* each **item** to toggle on or off the layer.

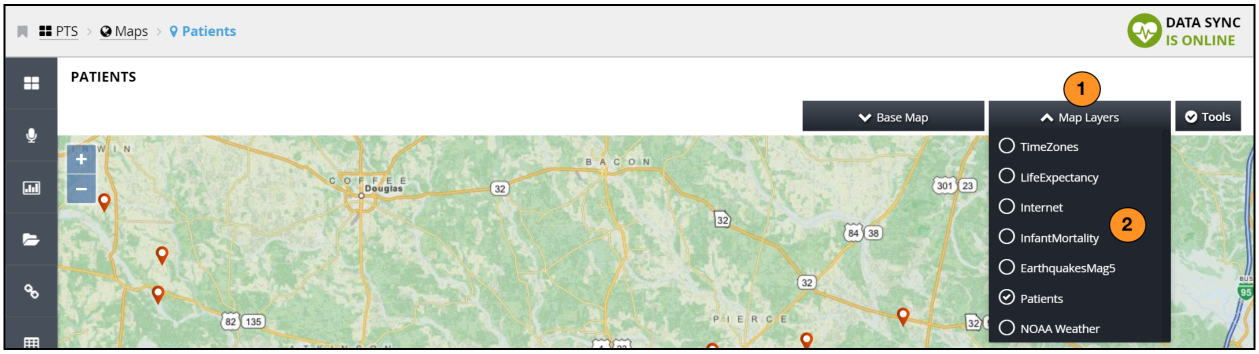


FIGURE 4-60: Map Layer Options

4 - 13.5 Adding a Map to a Dashboard

To add a map to a dashboard, as shown in FIGURE 4-61:

1. *Click or tap* the **Map** to be added to a dashboard.
2. *Click or tap* the **Tools** button in the right-hand corner of the screen.

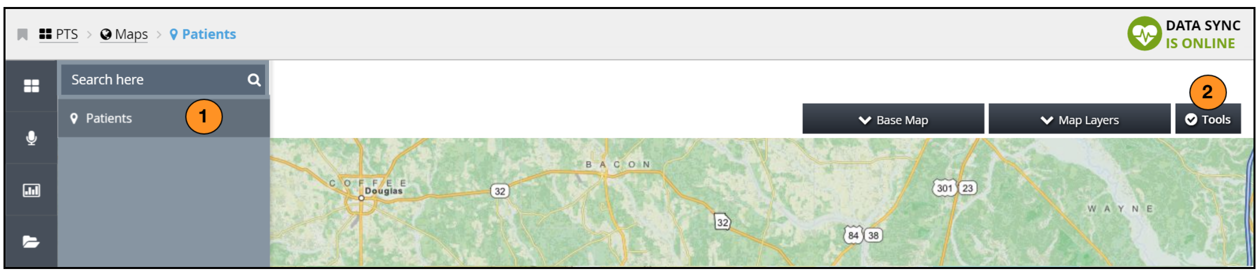


FIGURE 4-61: Tools Button

To continue adding the item(s) to a dashboard, as shown in FIGURE 4-62:

1. *Click or tap* the **circle** of the **Dashboard** that will receive the **Map**.
2. *Click or tap* the **Continue** button to confirm.

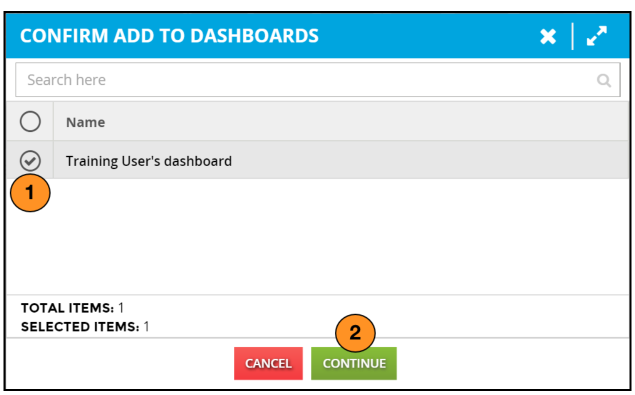
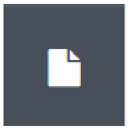


FIGURE 4-62: Add Map to Dashboard

4 - 14: Reports



Reports in HC Standard® allow for the viewing, printing, and exporting of data.

Reports in HC Standard® provide users with summarized data from a matrix. The report may be a snapshot in time of a matrix or a new visualization of data about a particular entity.

4 - 14.1 Using and Viewing a Report

To view a report within a Workspace, as shown in FIGURE 4-63:

1. *Click or tap* the **Reports** tab in the **Workspace Item** menu.
2. *Click or tap* the **Report** name.

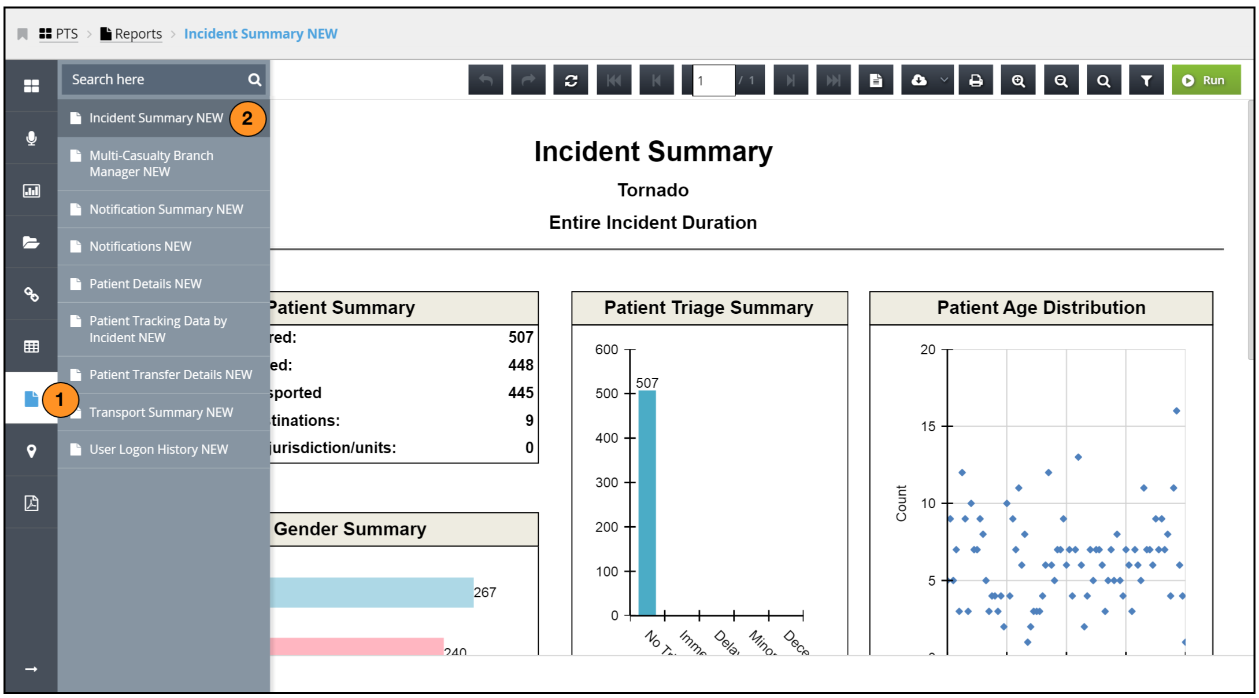


FIGURE 4-63: Reports

When the report generates, a user may then see parameter options for the report, as shown in FIGURE 4-64.

1. *Select* the appropriate parameter options.
2. *Click or tap* the **Run** button.

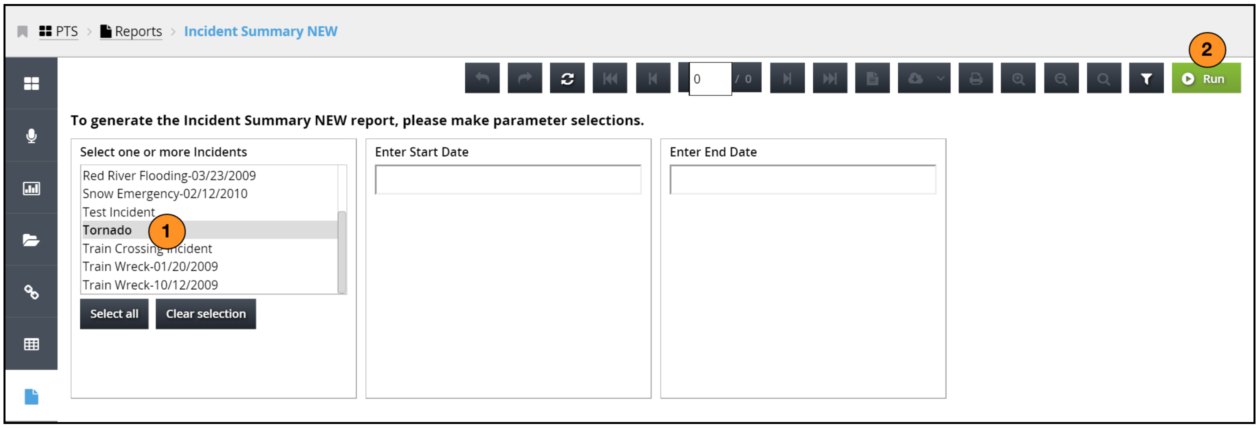


FIGURE 4-64: Report Parameter Options

4 - 14.2 Report Controls

The controls found at the top of the **Report** preview are explained in FIGURE 4-65.

1. **Page Navigation:** Navigate forward and backward through a report.
2. **Print Preview:** View how a report will look before printing.
3. **Download:** Save the report to Acrobat (.pdf), comma delimited (.csv), Excel (.xls), Rich Text Format (.rtf), Web Archive, XPS Document and Tagged Image File Format file.
4. **Print:** Print the report using a printer on the user's local computer or network.
5. **Zoom:** Zoom in or out of the report for readability.
6. **Parameter Options:** Opens the parameter options used to generate the report.
7. **Run:** Re-run the report.

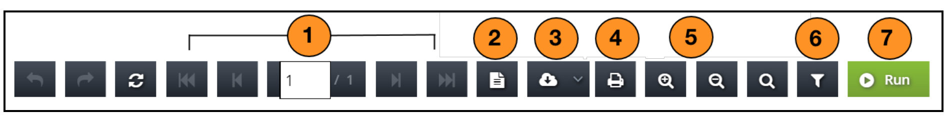
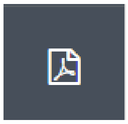


FIGURE 4-65: Report Controls

4 - 15: Forms



Forms are another way to enter data into HC Standard®.

Forms in HC Standard® allow matrix data to be entered by using a PDF form.

Important! Only computers running Microsoft Internet Explorer with Adobe Reader 6.0+ as the default PDF viewer will be able to submit a form from within HC Standard®. Other browsers will require users to download the form first and then upload it for submission. Mobile devices running iOS and Android may only view forms but not submit them.

---

4 - 15.1 Using a Form

To use a form from within a workspace (when Internet Explorer is being used as the browser), as shown in FIGURE 4-66:

1. *Click or tap* the **Forms** tab in the **Workspace Item** menu.
2. *Click or tap* the desired **Form** name.

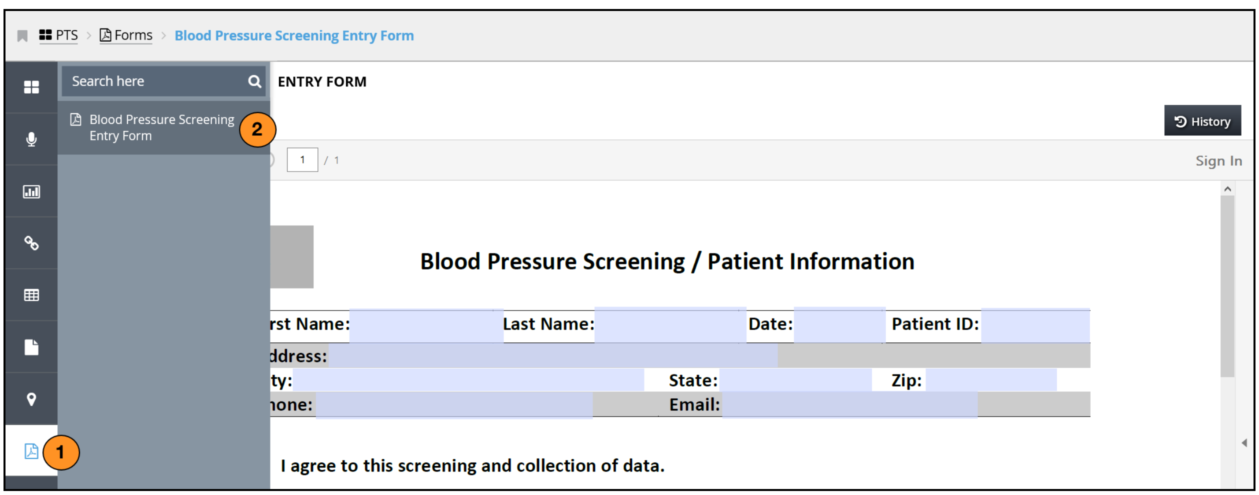


FIGURE 4-66: Forms

The form will be displayed, as shown in FIGURE 4-67:

1. *Fill out* the form as directed.
2. *Click or tap* the **Submit** button in the form to confirm.

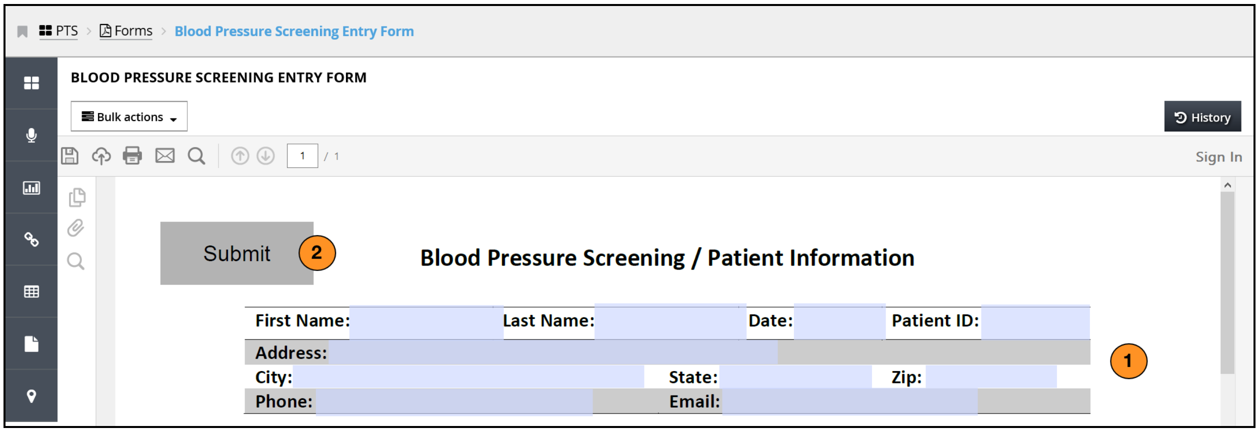


FIGURE 4-67: Form Submit Button

To use a form from within a workspace (when Internet Explorer is *NOT* being used as the browser), as shown in FIGURE 4-68:

1. *Click* the **Bulk actions** button in the desired form.
2. *Click* **Download**.

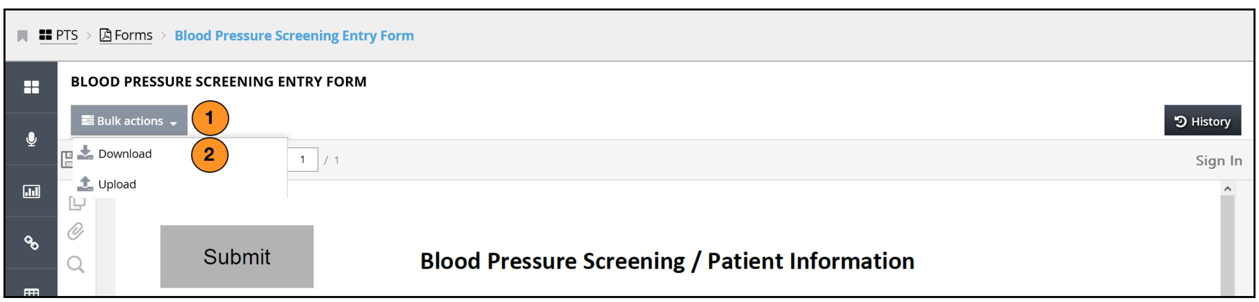


FIGURE 4-68: Bulk Actions Button

The Actions dialog will open, as shown in FIGURE 4-69:

1. *Click* **Yes**.

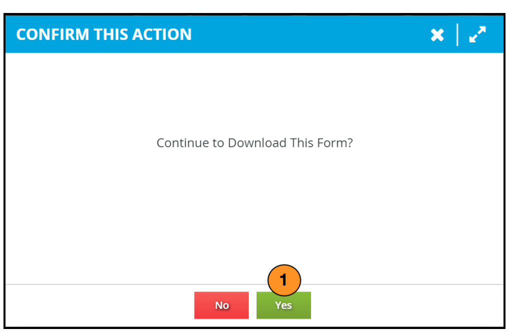


FIGURE 4-69: Forms - Actions

The form will be downloaded to the user's computer. *Open* the downloaded form and continue, as shown in FIGURE 4-70:

1. *Fill out* the form as directed.
2. *Click or tap* the **Submit** button to send the data to HC Standard®.

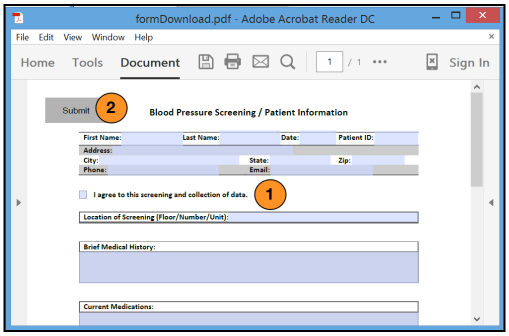


FIGURE 4-70: Form Submit Button

4 - 15.2 Viewing Form Instances

Every time a form is submitted to HC Standard®, it is saved as a separate instance. A user may review previous form instances if the user has the appropriate permission.

To view a form within a workspace, as shown in FIGURE 4-71:

1. *Click or tap* the **Forms** tab in the **Workspace Item** menu.
2. *Click or tap* the desired **Form** name.
3. *Click or tap* the **History** button.

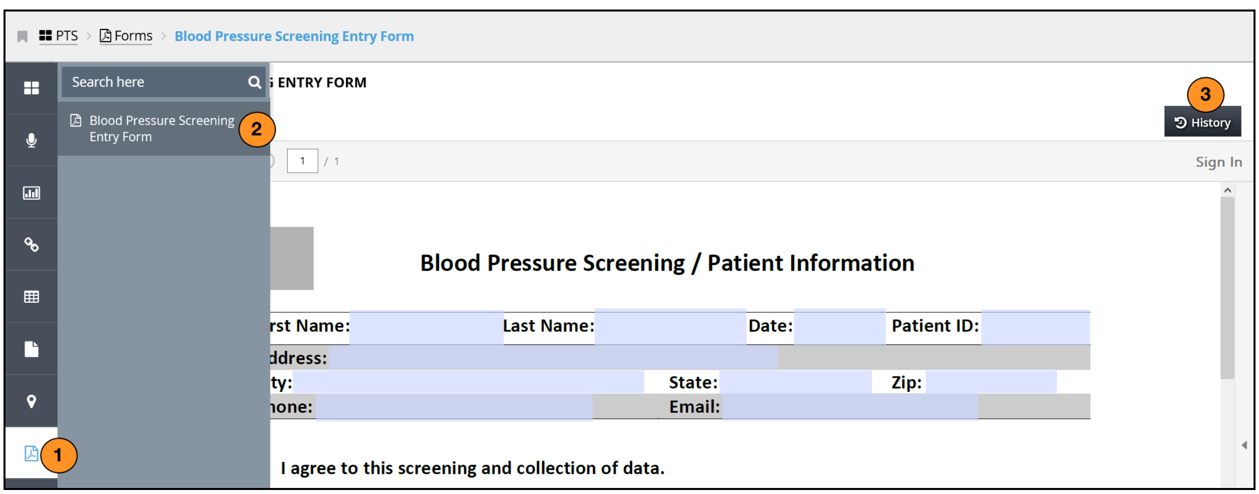


FIGURE 4-71: Forms - History

1. *Click or tap* an **instance** to view, as shown in FIGURE 4-72.

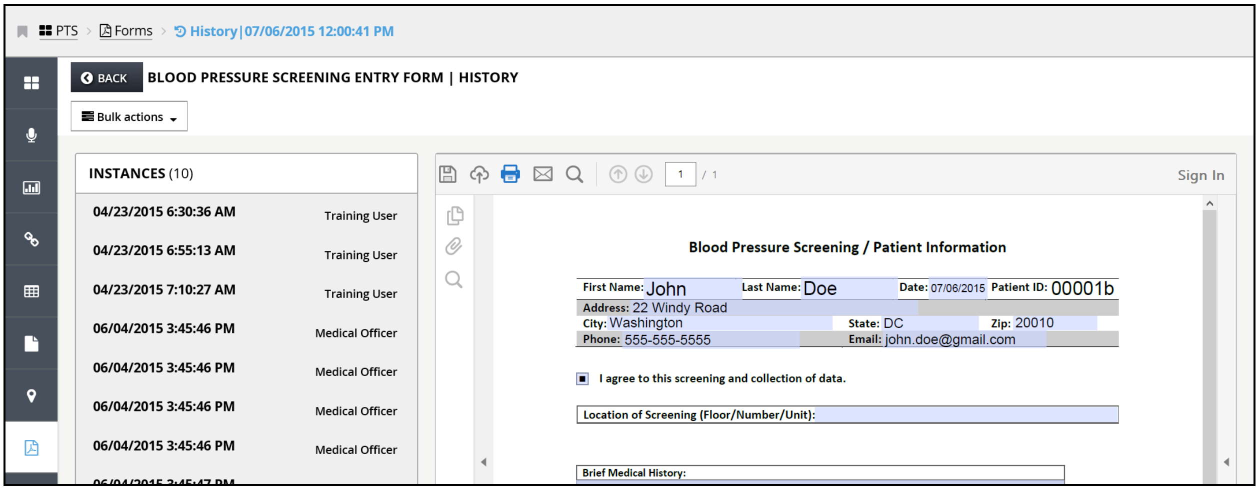


FIGURE 4-72: Forms Instances

To re-apply the form instance, as shown in FIGURE 4-73:

1. *Click or tap* the **Bulk actions** button.
2. *Click or tap* **Re-apply Instance**. *Confirm* the action to proceed.

FIGURE 4-73: Form Instances - Bulk Actions

4 - 16: Notifications

In the Healthcare and Emergency Services environment, there are many cases where groups and organizations need to get information quickly. Whether a state administrator is notifying all hospitals to expect a possible surge in patients due to a mass casualty incident or a transport officer is organizing a long term care facility evacuation, the ability to send a notification to a designated group proves invaluable.

Notifications allow an Admin or authorized user to communicate directly with users or user groups via e-mail, text messages, alphanumeric page, and directly as a notification within the HC Standard® application.

1. When logged into HC Standard®, the **Notifications** icon is located in the **Tab Navigation Menu**, as shown in FIGURE 4-74.

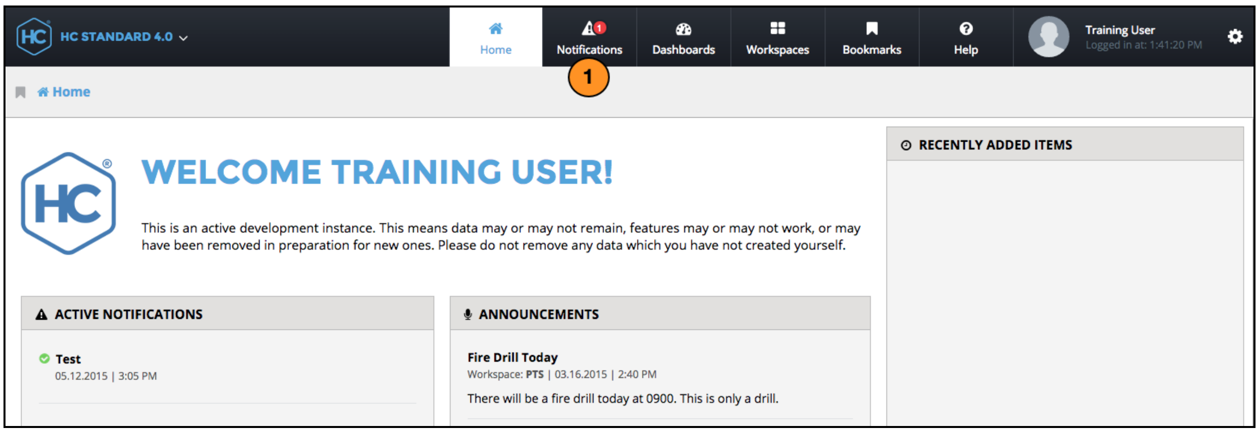


FIGURE 4-74: Notifications Icon

4 - 16.1 Configuring Notification Preferences

Notification settings are modified in the user profile. For more information on accessing the user profile, see "User Profile" on page 7.

To change the way that notifications are received, as shown in FIGURE 4-75:

1. *Click or tap* on the **User** icon.
2. *Click or tap* **Profile** from the drop-down menu.

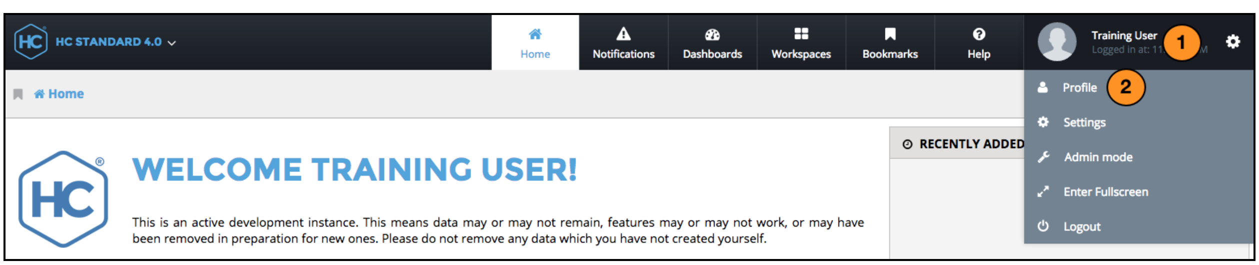


FIGURE 4-75: User Menu

In order to receive notifications by email, an email address must be entered in the **Email** box and the **Notify by Email** prompt must be checked.

To be notified by SMS, a **Cellular** and/or **Pager Provider** and **Number** must be entered in the appropriate boxes and the **Notify by SMS** box should be checked.

When the **Notification Pop-ups** box is checked, all messages received will automatically pop-up on the screen while logged in to HC Standard®.

4 - 16.2 Receiving a Notification

FIGURE 4-76 shows the different methods to view a notification.

1. When a notification is sent, and notification popups are enabled, a popup will alert the user.
2. *Click or tap* the **OK** button to view the notification.

To view a notification when pop-ups are not enabled:

3. *Click or tap* the **Notification** button at the top of the HC Standard®.
4. The **Notifications** list shows all notifications including title, date and time and message sent.

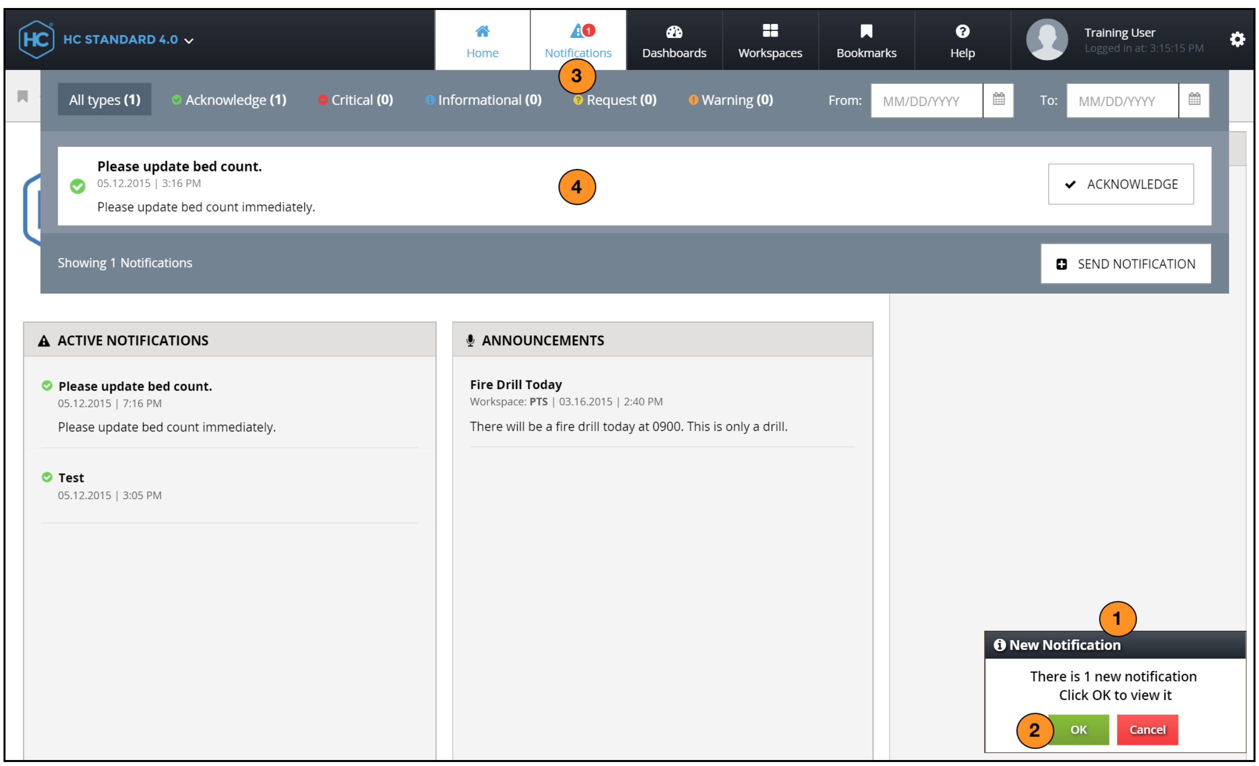


FIGURE 4-76: Notification Pop Up

4 - 16.3 Notification View Navigation

After *clicking or tapping* the **Notifications** tab, the buttons at the top filter the **Notifications** view, as shown in FIGURE 4-77.

1. The **All Types** button shows all notifications, including those that have not been acknowledged.
2. The **Acknowledge** button shows all notifications that require acknowledgment.
3. **Critical** filters notifications marked as critical.
4. **Informational** filters notifications marked as informational.
5. **Request** filters notifications marked as requests.
6. **Warning** filters notifications marked as warning.
7. The **Calendar Tools** allows for a date range for a notification to be specified.

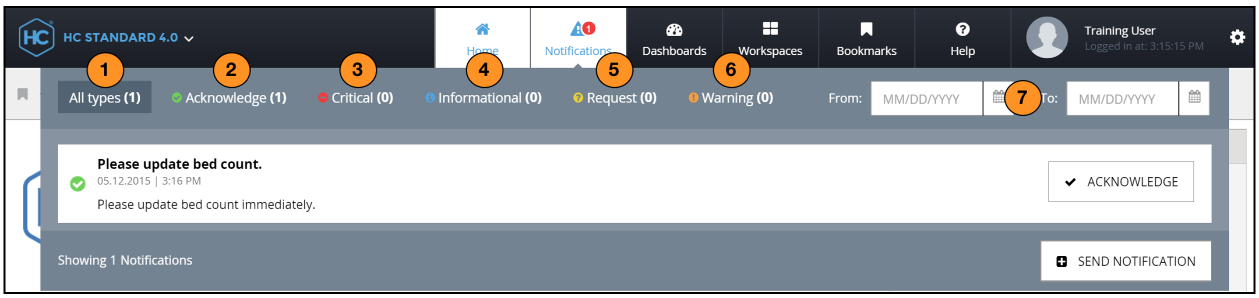


FIGURE 4-77: Notification Bar

Each category filter will show only notifications from that category.

4 - 16.4 Acknowledging a Notification

To acknowledge a message after it has been read, as shown in FIGURE 4-78:

1. *Click or tap* the **Acknowledge** button.

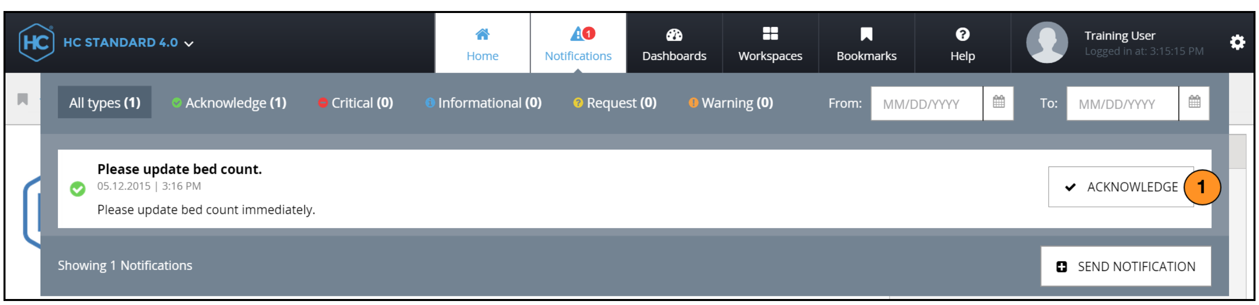


FIGURE 4-78: Notification Bar

The notification will be marked as acknowledged and show a timestamp when viewed at a later time.

4 - 16.5 Input data in a Notification

Some notifications will request data to be entered directly in the notification response, as shown in FIGURE 4-79:

1. *Click or tap* the **Input Required** button.

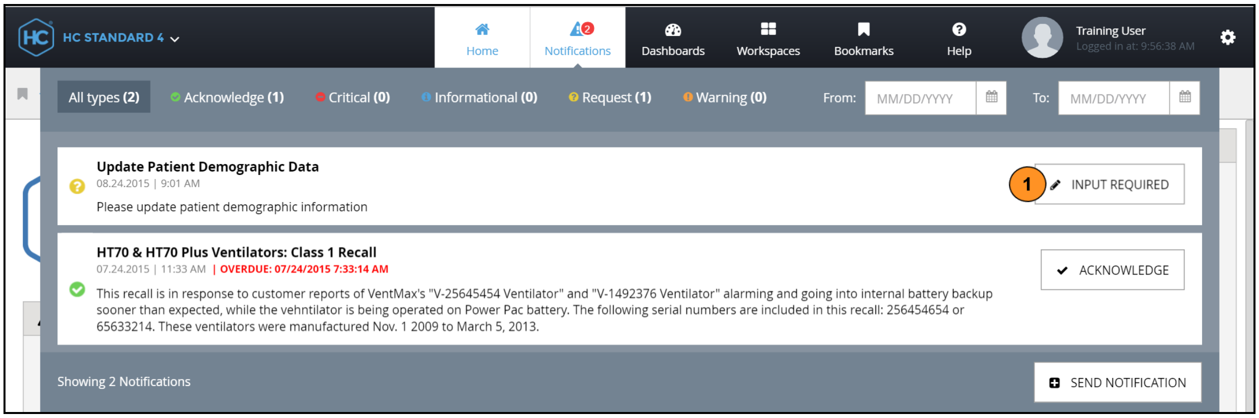


FIGURE 4-79: Notification Bar

FIGURE 4-80 shows the input area for the notification:

1. *Enter* **data** as necessary.
2. If additional entities are available for the user to edit, *use* the **arrows** to cycle between entities.
3. *Click or tap* **Dismiss** to cancel changes.
4. *Click or tap* **Submit** to save changes.

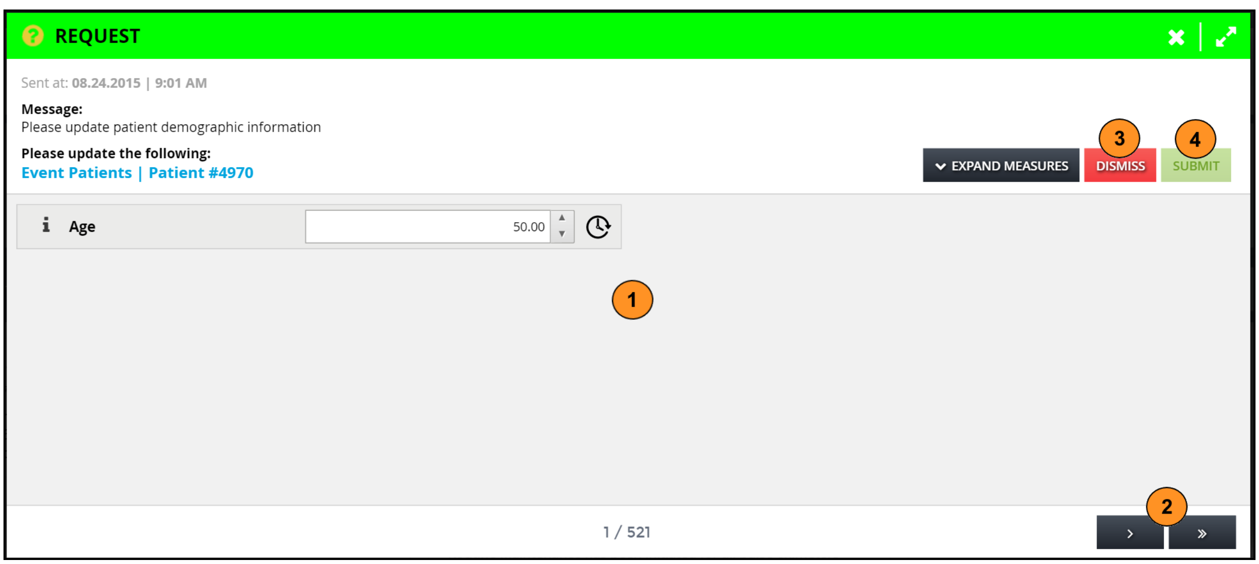


FIGURE 4-80: Input Data In Notification

4 - 16.6 Sending a Notification without a request for user input

Users with the appropriate permission are able to send notifications to other users or workspaces.

To send a notification that does not require user input, as shown in FIGURE 4-81:

1. *Click or tap* the **Notifications** button.
2. *Click or tap* the **Send Notification** button.

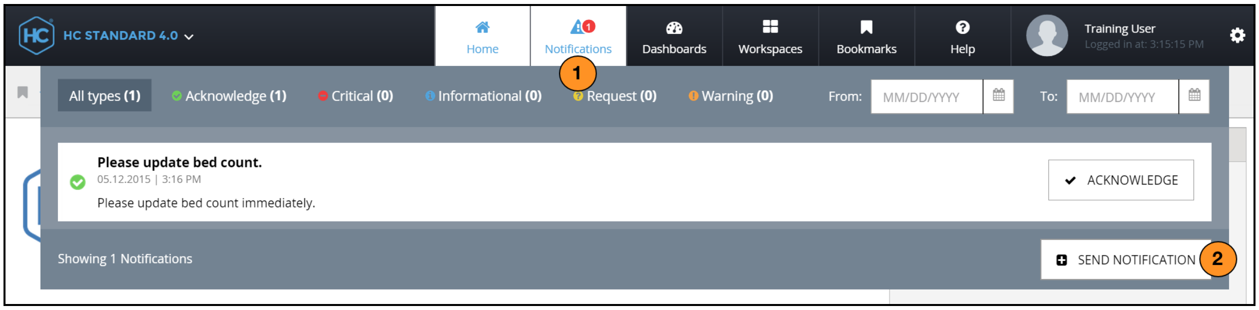


FIGURE 4-81: Notification Bar

FIGURE 4-82 shows the **Create Notification** dialog.

1. *Click or tap* the **Start Wizard** button.

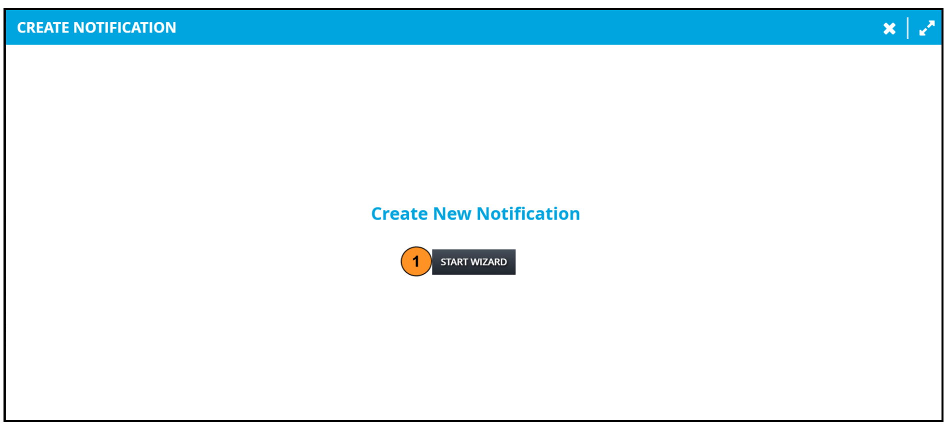


FIGURE 4-82: Create Notification

Enter the notification options, as shown in FIGURE 4-83:

1. *Uncheck* **Requires user input**.
2. *Select* the **Notification Type**.
3. *Enter* the **Notification Subject**.
4. *Enter* the **Message**.
5. *Click or tap* the **Next** button.

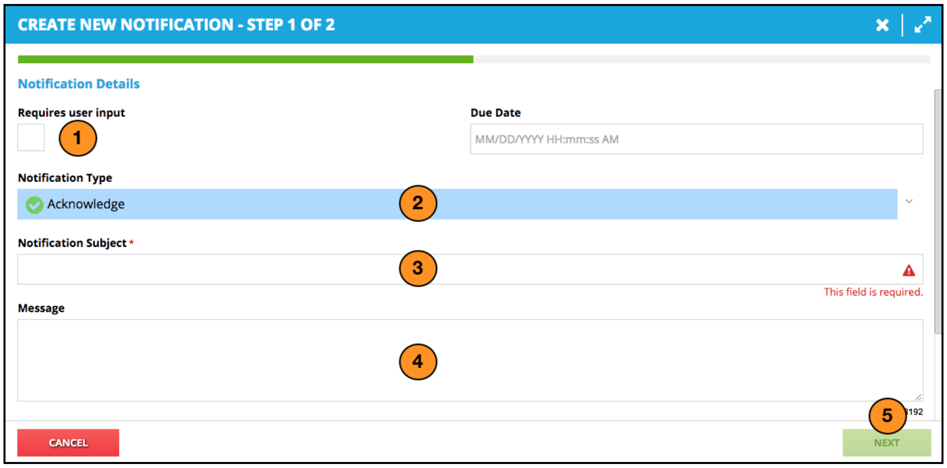


FIGURE 4-83: Create New Notification - Step 1

To select any combination of recipients, as shown in FIGURE 4-84:

1. *Click or tap* **Workspaces**, **Groups**, or **Users**.
2. *Search* for **recipients**.
3. *Select* desired **recipients**.
4. *Click or tap* the **Send** button when ready to send the notification.

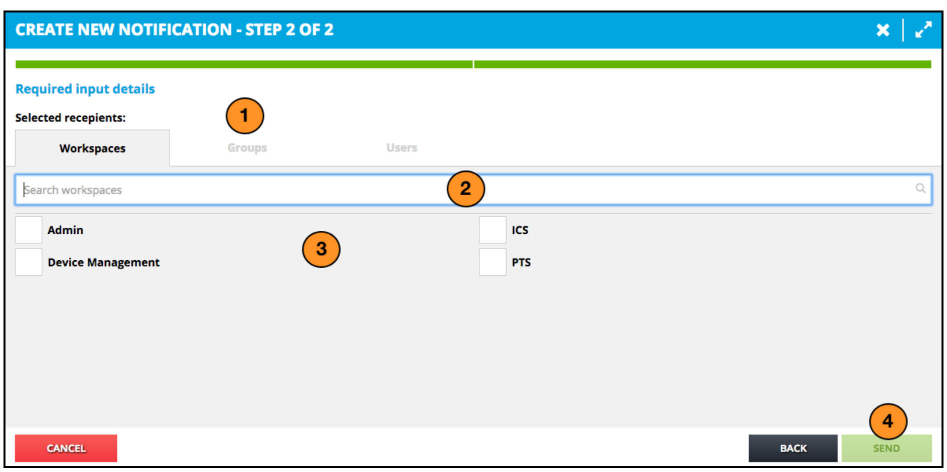


FIGURE 4-84: Create Notification - Step 2

4 - 16.7 Sending a Notification with a request for matrix-based input

Users with the appropriate permission are able to send notifications to other users or workspaces.

To send a notification that requires user input to update a matrix, as shown in FIGURE 4-85:

1. *Click or tap* the **Notification** button.
2. *Click or tap* the **Send Notification** button.

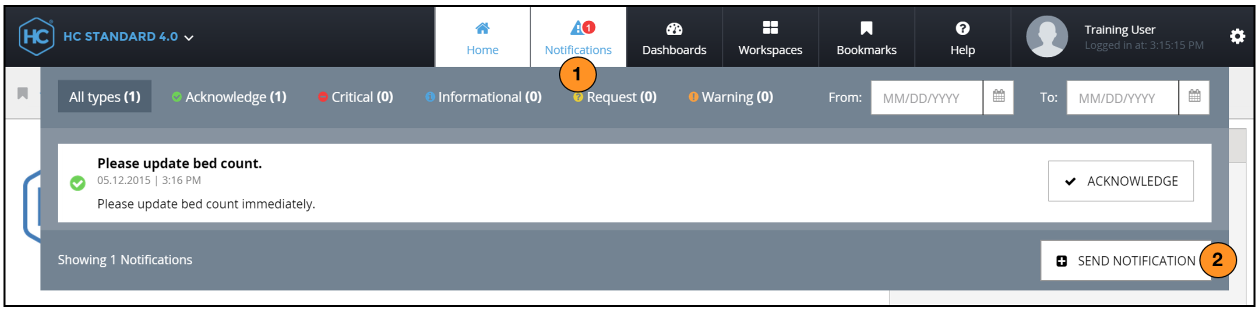


FIGURE 4-85: Notification Bar

FIGURE 4-86 shows the **Create Notification** dialog.

1. *Click or tap* the **Start Wizard** button.

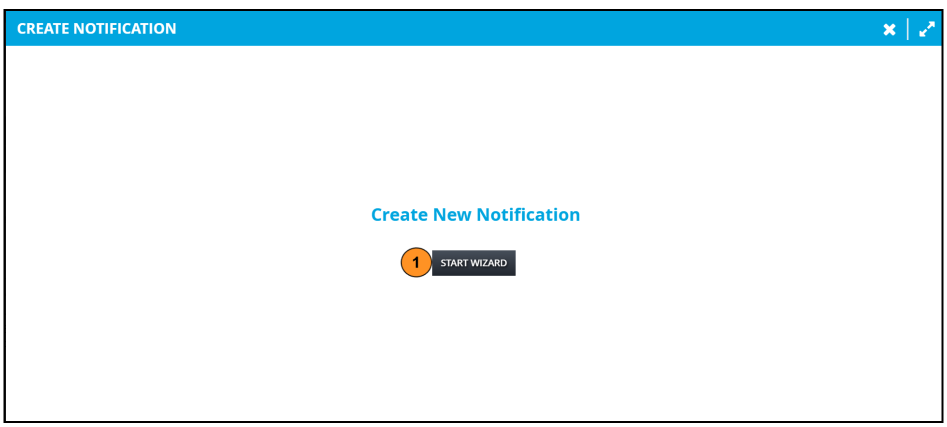


FIGURE 4-86: Create Notification

Enter the notification options, as shown in FIGURE 4-87:

1. *Click or tap* **Requires user input** to place a check.
2. *Enter* the **Due Date** if **Requires user input** is checked.
3. *Select* the **Notification Type**.
4. *Enter* the **Notification Subject**.
5. *Enter* the **Message**.
6. *Click or tap* the **Next** button.

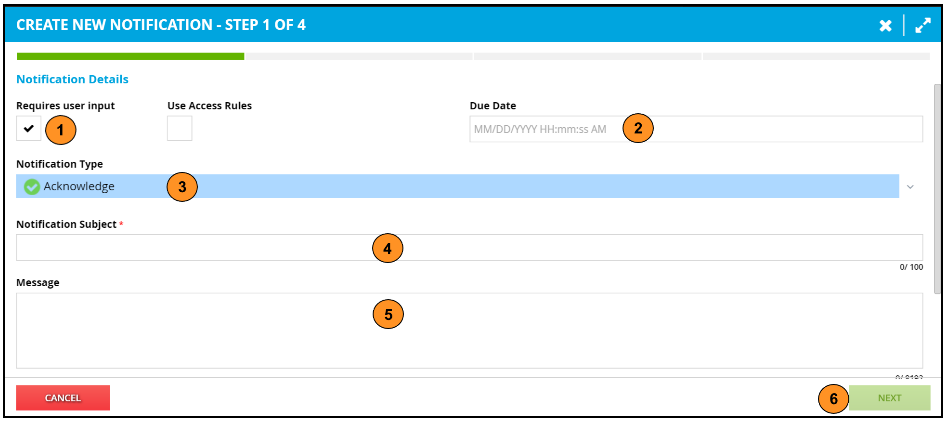


FIGURE 4-87: Create New Notification - Step 1

Select the matrix that users need to update, as shown in FIGURE 4-88:

1. *Search* for the **matrix**.
2. *Select* the desired **matrix**.
3. *Click or tap* the **Next** button.

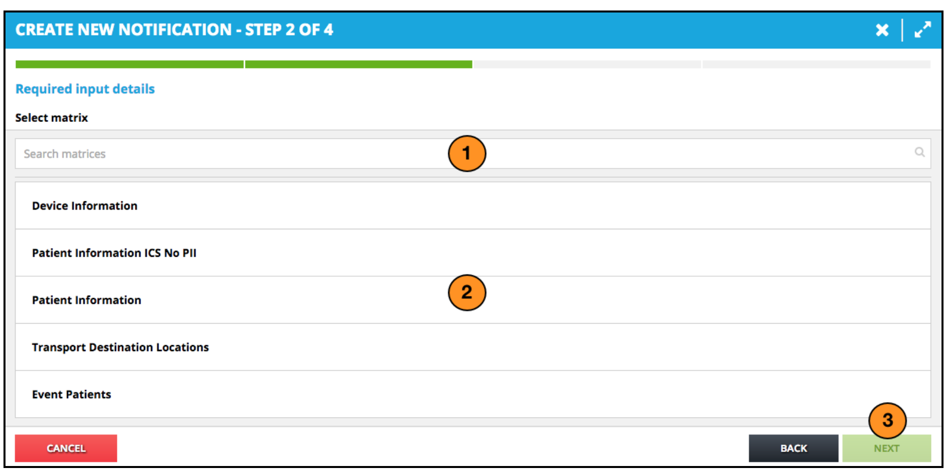


FIGURE 4-88: Create Notification - Step 2

Select the measures that users will update, as shown in FIGURE 4-89:

1. *Search* for **measures**.
2. *Select* desired **measure(s)**.
3. *Click or tap* the **Next** button.

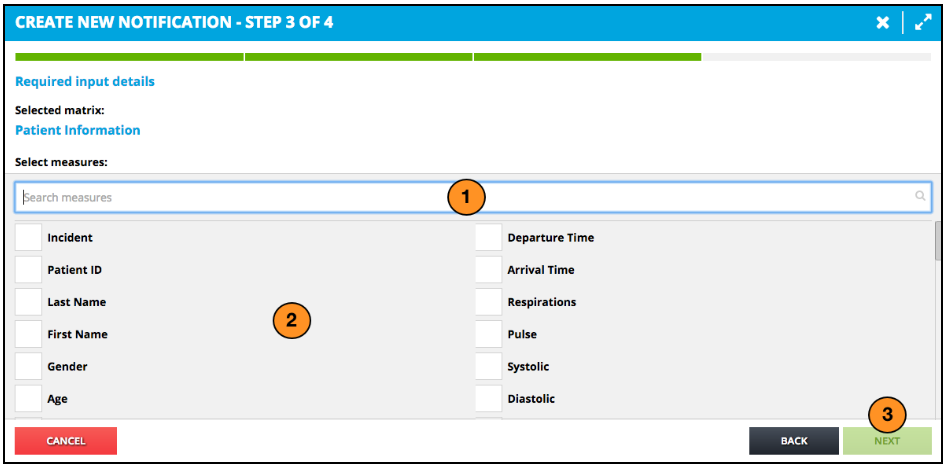


FIGURE 4-89: Create Notification - Step 3

To select any combination of recipients, as shown in FIGURE 4-90:

1. *Click or tap* **Workspaces**, **Groups**, or **Users** to select any combination of recipients.
2. *Search* for **recipients**.
3. *Select* desired **recipients**.
4. *Click or tap* the **Send** button when ready to send the notification.

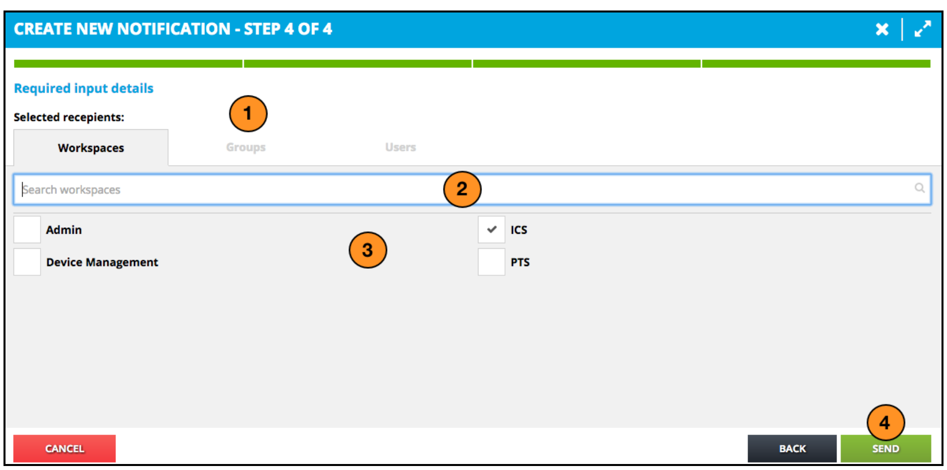


FIGURE 4-90: Create Notification - Step 4

Important! Only users that have read/write access to the matrix will receive the notification.

4 - 16.8 Sending a Notification with a request for Access Rule-based input

One of the notification options are to use Access Rules which allows certain users to only edit certain entities in a notification request. If Access Rules have been configured by an administrator, then users with the appropriate permissions may send Access Rule-based notifications to other users.

To send a notification that requires user input to update based on an Access Rule, as shown in FIGURE 4-91:

1. *Click or tap* the **Notification** button.
2. *Click or tap* the **Send Notification** button.

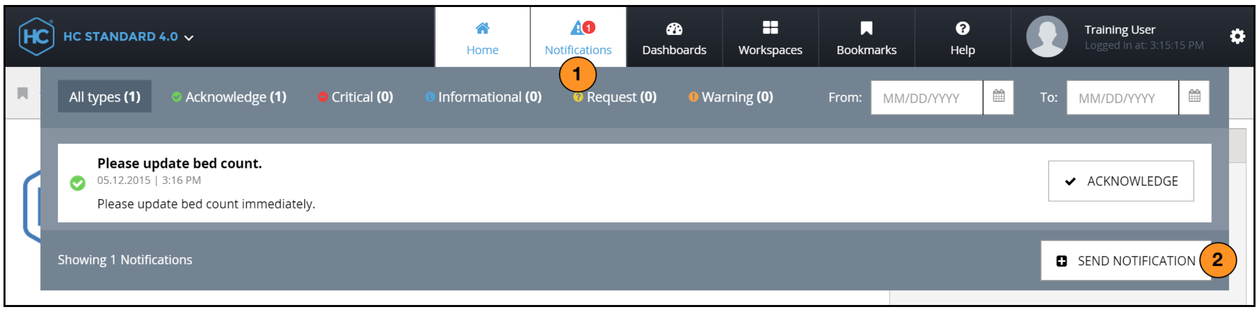


FIGURE 4-91: Notification Bar

FIGURE 4-92 shows the **Create Notification** dialog.

1. *Click or tap* the **Start Wizard** button.

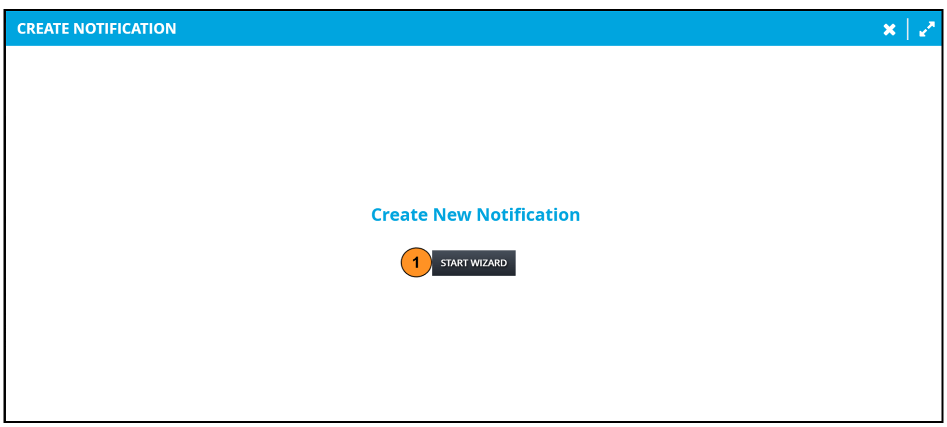


FIGURE 4-92: Create Notification

Enter the notification options, as shown in FIGURE 4-93:

1. *Click or tap* **Requires user input** to place a check.
2. *Click or tap* **Use Access Rules** to place a check.
3. *Enter* the **Due Date** if **Requires user input** is checked.
4. *Select* the **Notification Type**.
5. *Enter* the **Notification Subject**.
6. *Enter* the **Message**.
7. *Click or tap* the **Next** button.

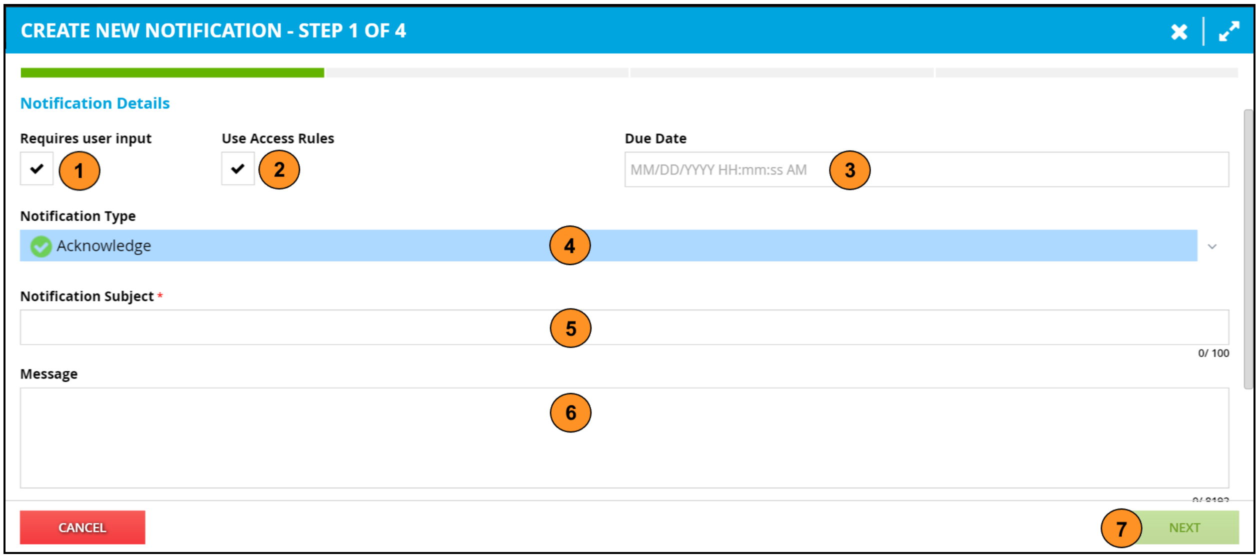


FIGURE 4-93: Access Rule Notification Step 1

Matrices that have an access rule created for them will be displayed, as shown in FIGURE 4-94:

1. *Select* the **matrix** to use.
2. *Click or tap* **Next**.

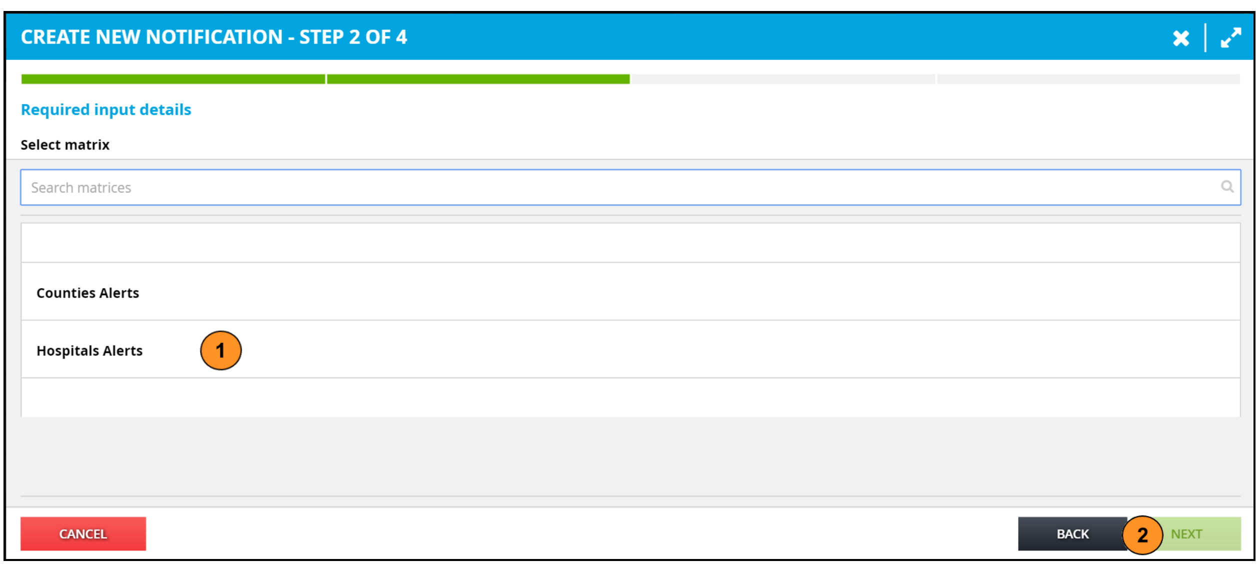


FIGURE 4-94: Access Rule Notification - Step 2

Select the measures that users will update, as shown in FIGURE 4-95:

1. *Select* desired **measure(s)**.
2. *Click or tap* **Next**.

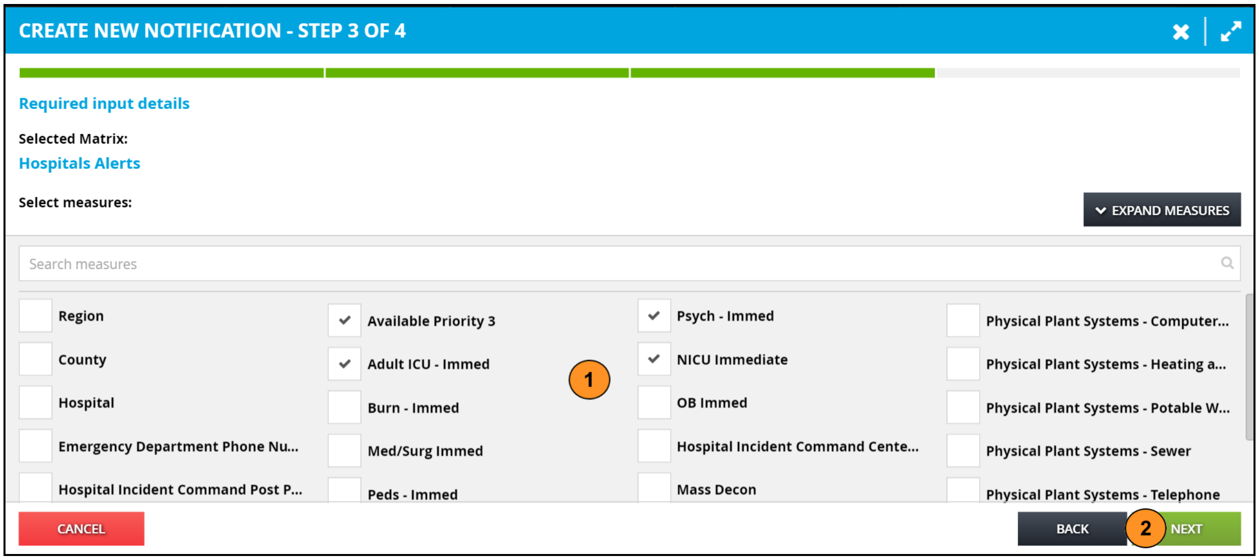


FIGURE 4-95: Access Rule Notification - Step 3

To select any combination of user groups, as shown in FIGURE 4-96:

1. *Click or tap* desired recipient **groups**.
2. *Click or tap* the **Send** button when ready to send the notification.

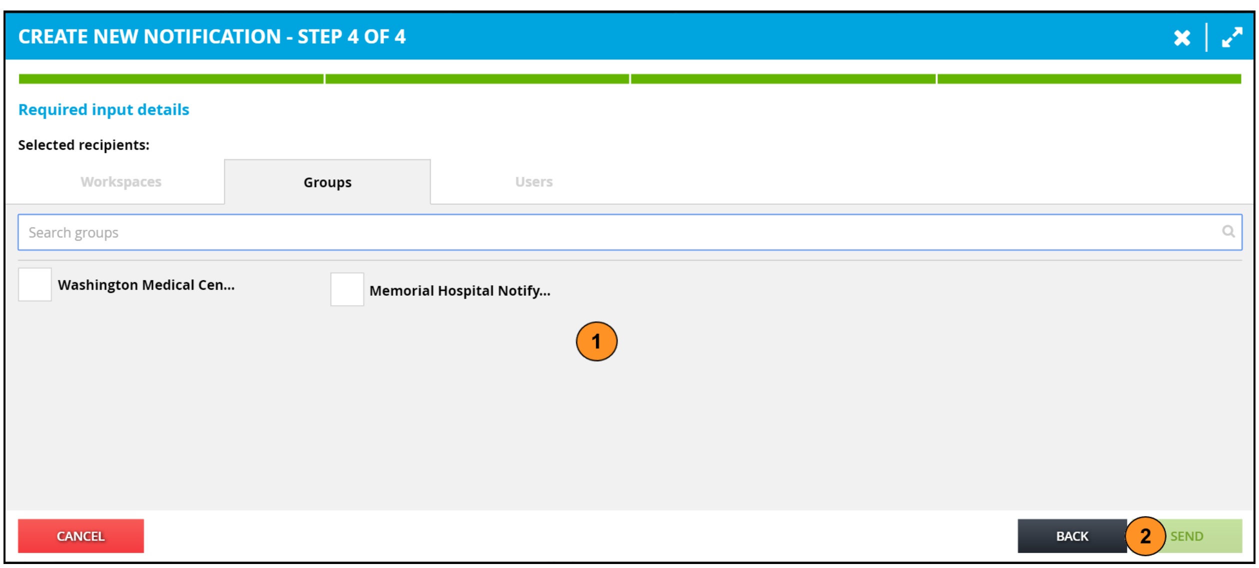


FIGURE 4-96: Access Rule Notification - Step 4.

4 - 17: Dashboards

As more information is added to a workspace in HC Standard®, the ability to place the most important and useful information on a customized **Dashboard** becomes extremely helpful. This allows for a unique visual representation of the data in an easy to use and view interface, as shown in FIGURE 4-97 . Dashboard views will refresh automatically, displaying the workspace items previously selected.

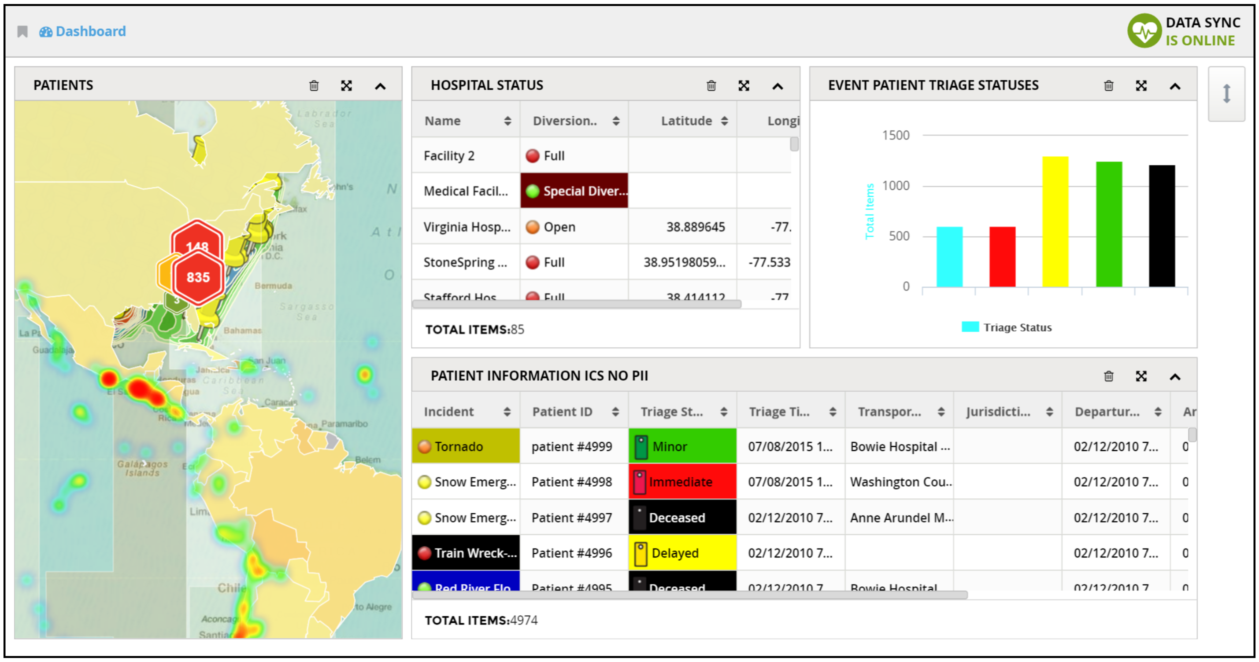


FIGURE 4-97: Dashboard

Note: The HC Standard® Admin must provide permission for dashboard access. If the appropriate dashboard privileges are not supplied, the user's Dashboard option will not appear.

The HC Standard® **Dashboard** is customizable at the individual user level. The information, data, and format can be selected for each Dashboard.

To view a dashboard, as shown in FIGURE 4-98:

1. *Click or tap* the **Dashboard** tab at the top of the screen.
2. *Click or tap* the desired dashboard **Name** to open.

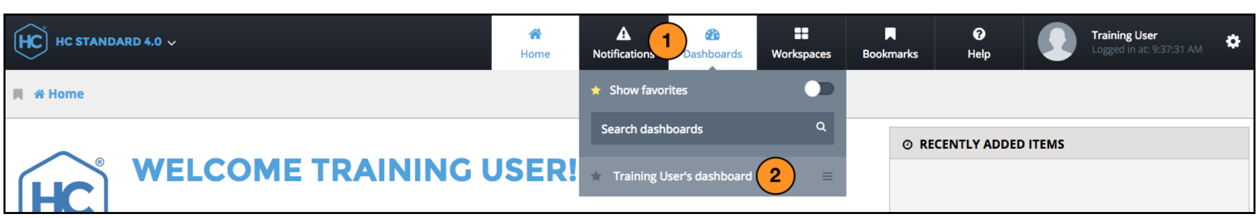


FIGURE 4-98: Dashboards Available To Open

Note: Any workspace item may be selected and displayed on the dashboard.

4 - 17.1 Adding Items to a Dashboard

The process for adding workspace items as dashboard items is the same way for all. In the series of examples below, an Announcement is being added as a dashboard item.

To add an announcement to a dashboard, as shown in FIGURE 4-99:

1. *Click or tap* the **Announcement** to be added to a dashboard.
2. *Click or tap* the **Tools** button.

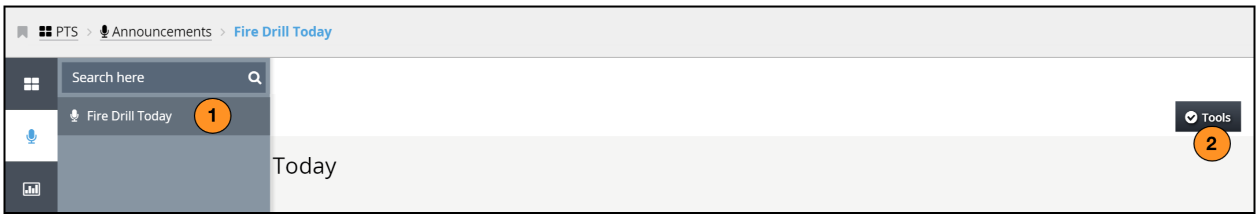


FIGURE 4-99: Tools Button

Continue adding the item(s) to a dashboard, as shown in FIGURE 4-100:

1. *Click or tap* the **circle** of the **Dashboard** that will receive the Announcement.
2. *Click or tap* the **Continue** button to confirm.

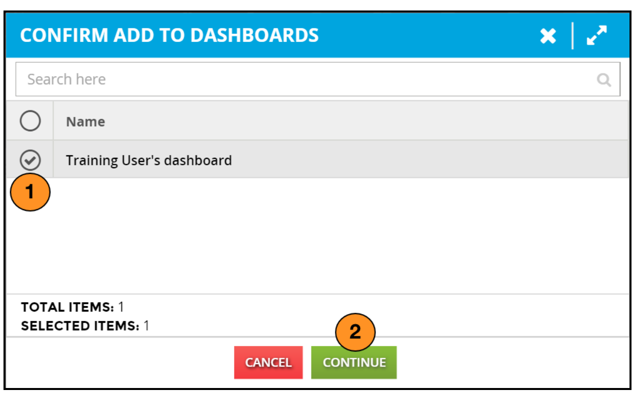


FIGURE 4-100: Add Announcement to Dashboard

Another way to add an item to a dashboard is from the **Workspace Overview**, as seen in FIGURE 4-101

1. *Click or tap* the **gauge** icon to the left of the item name.

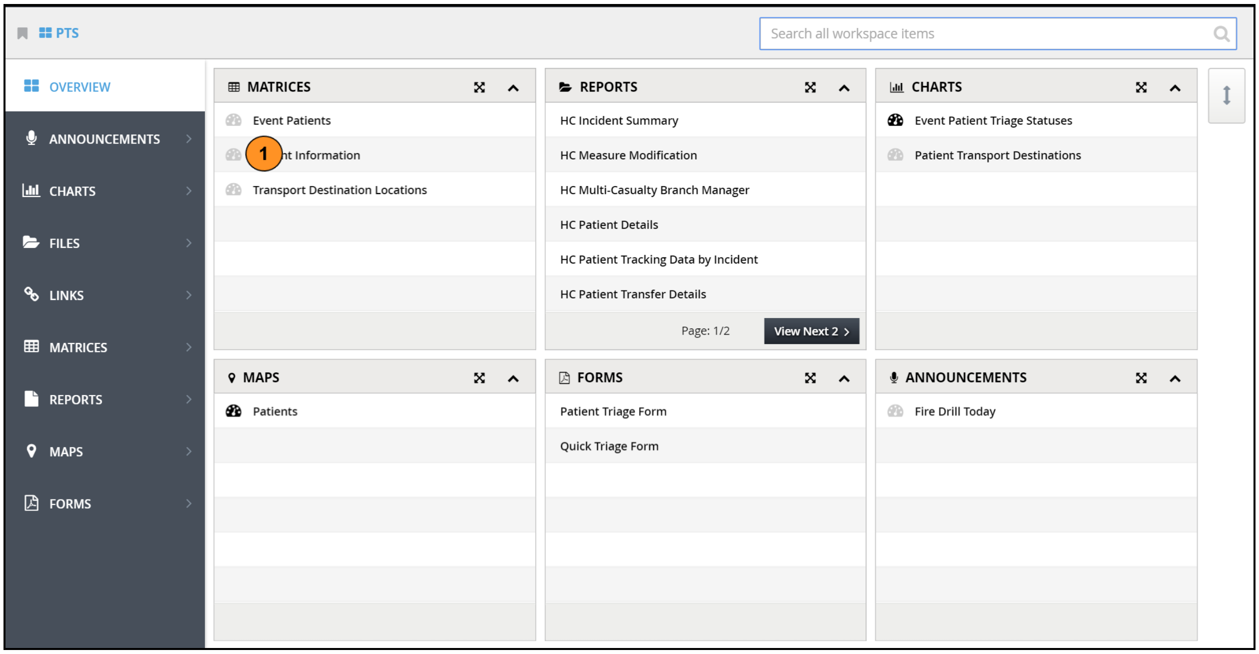


FIGURE 4-101: Add To Dashboard - Workspace Overview

Continue adding the item(s) to a dashboard, as shown in FIGURE 4-102:

1. *Click or tap* the **circle** of the **Dashboard** that will receive the Announcement.
2. *Click or tap* the **Continue** button to confirm.

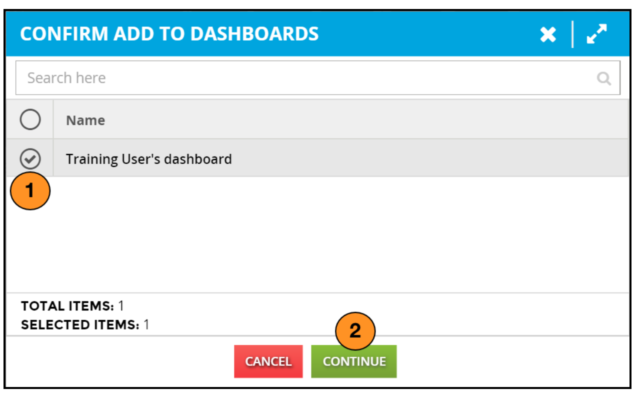


FIGURE 4-102: Add Item to Dashboard

4 - 17.2 Removing Items from a Dashboard

To remove an item from the user dashboard, as shown in FIGURE 4-103:

1. *Click or tap* the **trashcan** icon next to the dashboard item's name.

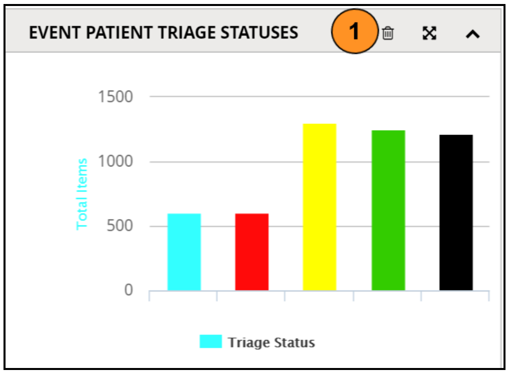


FIGURE 4-103: Remove dashboard item

4 - 17.3 Display Dashboard Items

Items selected for the dashboard are displayed in panes and arranged by rows and columns, as shown in FIGURE 4-104.

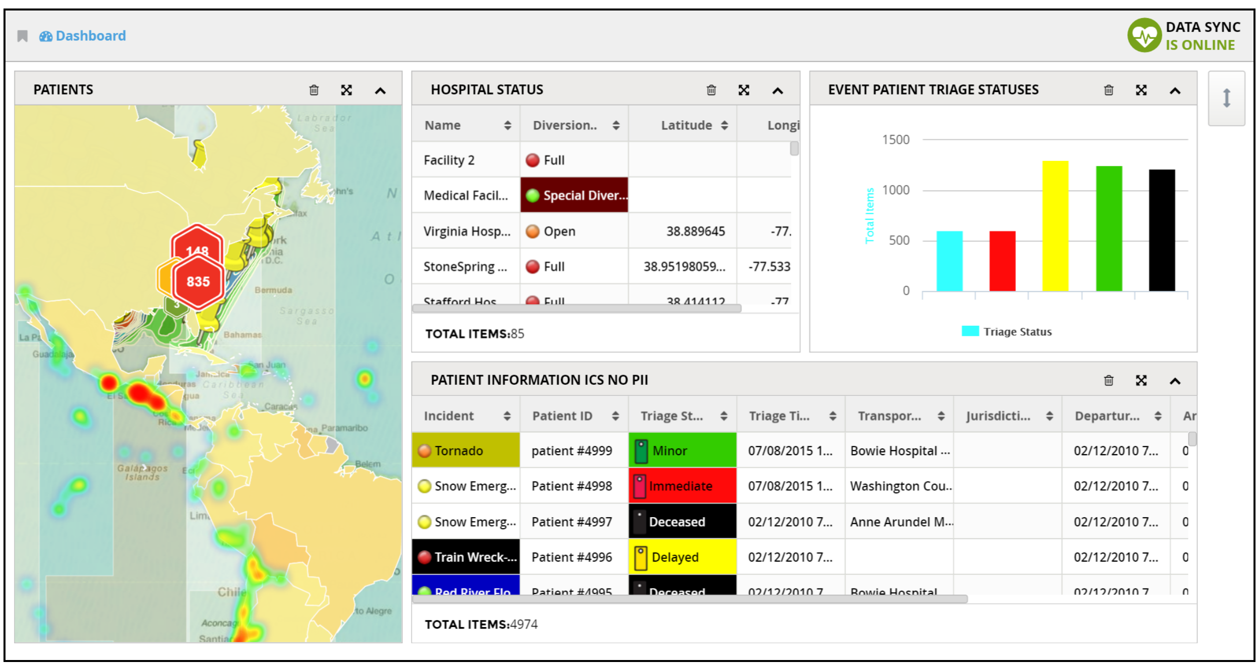


FIGURE 4-104: Dashboard View

The dashboard view will refresh, displaying the workspace items selected. If there are too many items for the monitor size, additional items may be viewed by using the vertical scroll bars.

4 - 17.4 Arrange and Size Dashboard Items

The ability to arrange panes on the dashboard allows for the management of pertinent information by moving the most used to the best location on the dashboard. For example, a transport destination list might be extremely important and given priority over other dashboard panes. The dashboard pane can be dragged to a place on the screen that gives the best visual awareness for that information.

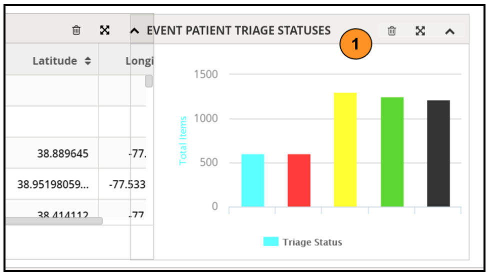


FIGURE 4-105: Move Dashboard item

Each pane on the dashboard may be moved to any location on the dashboard. To move a pane on the dashboard, as shown in FIGURE 4-105:

1. *Click or tap*on any space in the dashboard item header. *Drag* the window to the desired location.

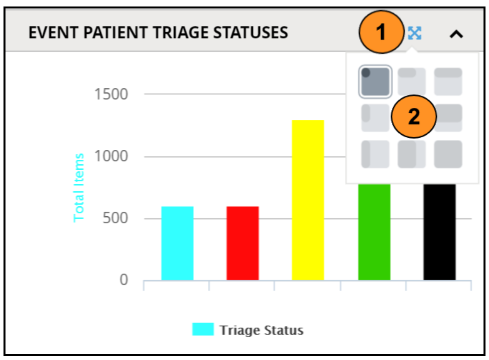


FIGURE 4-106: Adjust Dashboard Item Size

Each pane on the dashboard may be resized on the dashboard. To re-size a dashboard item, as shown in FIGURE 4-106::

1. *Click or tap* on the **expanding arrows** button.
2. *Select* the item size.

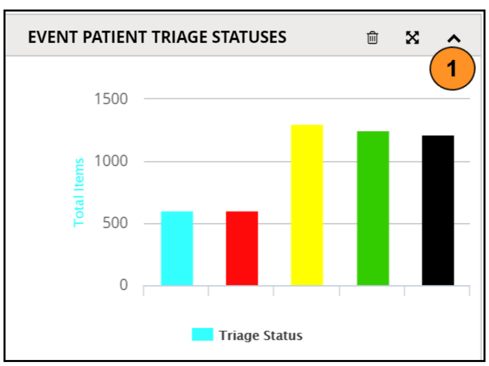


FIGURE 4-107: Collapse/Expand Dashboard Item

Each pane on the dashboard may be collapsed or expanded on the dashboard. To collapse or expand a dashboard item, as shown in FIGURE 4-107:

1. Collapse dashboard items by *clicking or tapping* the **up** arrow button. *Click or tap* again to expand the item.

4 - 17.5 Quick Access to Dashboard Items

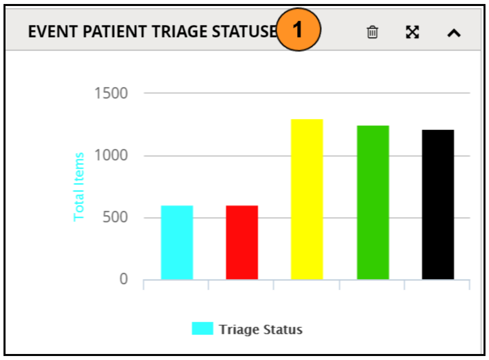


FIGURE 4-108: Quick Access Dashboard Item

When in the dashboard view, it is possible to navigate directly to a dashboard pane's source matrix or enlarge the pane in the case of viewing a map, as shown in FIGURE 4-108:

1. *Click or tap* on the dashboard item's **name** to go directly to the **Workspace** and full view of the item's source.

Chapter 5 - Glossary

Word or Phrase	Description
Administrator	A user with all privileges in HC Standard®. They have the ability to configure data, manage users, create and delete items, etc.
Admin mode	This is where the system configuration and setup occurs. User accounts designated with administrator permissions will have access to HC Standard® Admin mode.
Announcements	Notices that are posted on a bulletin board within a Workspace.
Application	Any system within the HC Standard® Suite (e.g. HC Patient Tracking, Mass Arrest, Incident Commander, CHATS Module, EPCR Module, etc.).
Application Launcher	Use to quickly switch to another application in the HC Standard® Suite.
Bookmarks	Allows quick access to previously saved items in HC Standard®.
Breadcrumb Navigation Bar	At any point within HC Standard®, this can be used to return to a previously visited section of the application. This is also known as the system path and is located below the tab navigation menu.
Charts	Provide a graphical displays of live matrix data.
Dashboard	A graphical interface that displays live relevant data to a user.
Download CSV	Allows a user to download matrix data into a .csv excel file.
eMEDS Interface	Image Trend ePCR.
Entity	An entity is a noun - person, place, or thing that needs to be tracked (e.g. patients). Each entity has certain attributes and can be grouped together with other entities.
Entity Group	A group of similar entities and associated measures.
EPTS	Electronic Patient Tracking System.
EWRAP	Emergency Wireless Routing Access Point. An EWRAP is a portable router that provides a secure data connection for users to connect any wireless device to a network or WAN.
Files	Any type of document or media file can be stored in a Workspace for viewing by appropriate users. A user must have the proper software installed on the user's local computer for viewing certain file formats.
Filters	Used to restrict or control the data displayed in a matrix.
Forms	Allows a user to enter matrix data by using a fillable PDF form.
Global Permissions	System-wide permissions, such as the ability to run the mobile patient tracking application or use Incident Commander, are controlled through Global Permissions. Other uses for global permissions include delegating Admin functions, such as creating workspaces and users to Sub-Admins.
ICS Settings / Information	Incident Command System settings. Incident, Division, and Position are referred to as the ICS Settings.
Incident Commander	Provides a high level summary of incident information in near real-time. Data is displayed in an easy-to-view customizable dashboard.

Links	Provide quick access to web resources such as traffic reports, weather conditions, live video feeds, event specific websites, or any other web link pertinent to the Workspace.
Lists	Used to populate drop down pick lists that contain a set of items. For example, a list of the fifty states could be created, then used by measures called "Home Address State", "Work Address State" and "Birth State". Lists can be used to store commonly used information (e.g. "Triage Status", "Divisions" or "Room Status").
Map Layers	Users may toggle additional map layers that may be of interest. Layers may include weather radar, geological fault lines, or even time zone references.
Maps	Displays matrix data that includes GPS coordinates on a visual map representation.
Matrix	A table of data. This is where a user spends the majority of time and where visualization of data takes place. Matrices supply the information used in reports, maps and charts.
Matrices	Plural term for Matrix.
MCI	Mass Casualty Incident. Any incident in which emergency medical services resources, such as personnel and equipment, are overwhelmed by the number and severity of casualties.
Measures	Data elements that, when taken together, provide a clear picture of the status of a given entity.
Measure Group	Allows users to gather any number of measures together under a common label (e.g. body parts, vital information, demographic information, etc.).
Measure Type	Can be a check box, date/time, numeric value, list, free text, or a relation.
Notifications	View received alerts and send new alerts to other users.
Permission Set	A list of system functions created and assigned to a user group. This defines the functions a specific user group will be able to perform in HC Standard®.
Reports	Provide an organized view of matrix data that a user can view, print, or export.
Sort	Used to order the data displayed in a matrix in ascending or descending order.
Sub-Admin	A user who is delegated to perform some, but not all, Admin functions in the system.
Synchronization	This term describes the sending of data from a mobile device to the back-end HC Standard® database for viewing on the web interface.
User Groups	The section within HC Standard® Admin mode that allows permissions to be created for a specific group of users.
Workspace	Related Reports, Charts, Files, Announcements, Matrices, and Links are stored in one area called a Workspace. A user may have more than one Workspace.
Workspace Permissions	All data in HC Standard® is made available through workspaces. Matrices, charts and other items are placed in a workspace. User groups are assigned to the workspace and given access to those items with one of the permission sets available in the system.