

DIALYSIS CENTER INFORMATION

SYSTEM GUIDE

September 2020

1. **Getting Started**

For first time user, use the administrator email account **assist.srdci@gmail.com** and its password is **administrator.** Once administrator account is logged in, it is recommended to change the password immediately.

1. **Managing System User**

For administrator and head nurse only, starting at home page. Follow the step for creating new user.

1. Click the System User at the High-level access and the page will show the list of system users. You may select an existing user to change his/her name or the user status (e.g. active status means user can login into the system or recover password while disabled status cannot) in the system and also can add new system user. For security purpose in creating new user, tell the new user to write his/her complete name and email (prefer work email) on a sheet of paper and give it to an administrator/head-nurse to fill the new user form.
2. Fill-up all required inputs and select the role assigned for the new user.
3. Save the form and wait for email creation message. After receiving a success message, tell the new user to access his/her email and look for an email created by the system.
4. **User Verification**

For the new user, after receiving the email created by the system:

1. Open the email received and click **Set up account.**  The link will open verification form in a new tab,
2. Fill-up all required inputs and make sure to place a signature in the signature box(use tablet or phone for better experience). In case for doctor role, fill-up license details and expertise title(example is FPCS) to use them in generating signed documents that needs license details such as prescription, hemodialysis order, etc. User has the option not to enter his/her license details on the system if he/she doesn’t want to.
3. Save the form and wait for confirmation. Once confirmed, the user may start using the system by navigating to login page and enter login credentials.
4. **User Role and its Authorized Access**

There are seven roles in the system namely Administrator, Head Nurse, Nurse, Doctor, Technician, Clerk and Dietician. Home page can be accessed to all but limited accessibility of feature based on role assigned. Refer to the section that you are assigned. Forms listed in the table are visible to users.

Legend

Create – can create new entry

Read – can view the current entry selected or number of entries listed

Update – can update the current entry selected

Print – can generate a PDF file for printing

*Blank –* not applicable

1. **Head Nurse and Nurse**

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| **Forms that are accessible** | **Head Nurse** | **Nurse** |
| Patient Data Form | Create, Read, Update, Print  (Can create new patient) | Read, Print |
| Nurse Endorsement(Nurses only) | Create, Read, Update, | Create, Read, Update, |
| Treatment Monitoring | Create, Read, Update, Print | Create, Read, Update, Print |
| Diagnostic Procedure | Create, Read, Update, Print | Create, Read, Update, Print |
| Laboratory Monitoring | Create, Read, Update, Print | \*Create, \*Read, \*Update, \*Print |
| Problem List | Create, Read, Update, Print | Create, Read, Update, Print |
| Medication List | Create, Read, Update, Print | Create, Read, Update, Print |
| Vaccination Record(Patient) | Create, Read, Update, Print | Create, Read, Update, Print |
| Hospitalization History | Create, Read, Update, Print | Create, Read, Update, Print |
| Dietary Prescription | Read, Print | Read, Print |
| Medical Abstract | Read, Print | Read, Print |
| Hemodialysis Order | Create, Read, Update, Print | \*Create, \*Read, \*Update, \*Print  (Confidential Data are hidden) |
| REDCOP | Create, Read, Update, Print | Create, Read, Update, Print |
| Blood Transfusion Monitoring | Create, Read, Update, Print | Create, Read, Update, Print |
| Prescriptions | Read, Print | Read, Print |
| Patient Survey | Create, Read | Create Read |
| Vaccination Record(Coworker) | Create, Read, Update, Print | Create, Read, Update, Print |
| Room Temperature Monitoring | Read, Update, |  |
| Refrigerator Monitoring | Read, Update, |  |
| Water Treatment Monitoring | Read, Update |  |
| Equipment Monitoring | Read, Update |  |
| New User Form | Create |  |
| System Settings | Create, Read, Update  (Only Treatment Monitoring settings) |  |

1. **Doctor**

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| **Forms that are accessible** | **Doctor** |
| Patient Data Form | Read, Print |
| Doctor Order(Doctor only) | Create, Read, Update, |
| Treatment Monitoring | Read, Update, Print  (In update, only doctor order and order verification is allowed) |
| Diagnostic Procedure | Create, Read, Update, Print |
| Laboratory Monitoring | Read, Update  (Only on remarks) |
| Problem List | Read, Print |
| Medication List | Read, Print |
| Vaccination Record(Patient) | Read, Print |
| Hospitalization History | Read, Print |
| Dietary Prescription | Create, Read, Update, Print |
| Medical Abstract | Create, Read, Update, Print |
| Hemodialysis Order | Read, Update, Print  (In update, only assigned nephro verification is allowed) |
| REDCOP | Read, Print |
| Blood Transfusion Monitoring | Read, Print |
| Prescriptions | Create, Read, Update, Print |

1. **Clerk**

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| **Forms that are accessible** | **Clerk** |
| Patient Data Form | Create, Read, Update, Print  (Can create new patient) |
| Prescriptions | Read, Update, Print |
| Philhealth | Create |
| System Settings | Create, Update  (Philhealth settings only) |

**D. Dietician**

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| **Forms that are accessible** | **Head Nurse** |
| Dietary Prescription | Create, Read, Update, Print |

**e. Technician**

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| **Forms that are accessible** | **Technician** |
| Refrigerator Monitoring | Read, Update, |
| Water Treatment Monitoring | Read, Update |
| Equipment Monitoring | Read, Update |
| Equipment Monitoring | Read, Update |

**f. Administrator**

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| **Forms that are accessible** | **Head Nurse** |
| Patient Data Form | Create, Read, Update, Print  (Can create new patient) |
| Treatment Monitoring | Create, Read, Update, Print |
| Diagnostic Procedure | Create, Read, Update, Print |
| Laboratory Monitoring | Create, Read, Update, Print |
| Problem List | Create, Read, Update, Print |
| Medication List | Create, Read, Update, Print |
| Vaccination Record(Patient) | Create, Read, Update, Print |
| Hospitalization History | Create, Read, Update, Print |
| Dietary Prescription | Read, Print |
| Medical Abstract | Read, Print |
| Hemodialysis Order | Create, Read, Update, Print |
| REDCOP | Create, Read, Update, Print |
| Blood Transfusion Monitoring | Create, Read, Update, Print |
| Prescriptions | Read, Print |
| Patient Survey | Create, Read |
| Vaccination Record(Coworker) | Create, Read, Update, Print |
| Room Temperature Monitoring | Read, Update, |
| Refrigerator Monitoring | Read, Update, |
| Water Treatment Monitoring | Read, Update |
| Equipment Monitoring | Read, Update |
| New User Form | Create |
| System Settings | Read, Update |

1. **System Components**

Most of the forms has its own pagination, a list of entries created with navigation buttons such as First page, previous page, next page and last page located at the bottom to navigate through number of entries. Additionally, each entry in the list will have additional entry info for showing clarity and uniqueness from other entries created. Each system component below shows steps presented in table and/or notes that will guide users how to use.

1. **Patient List, Patient Data and Patient Files**

To show the list of patients registered on the system, navigate to Patient List. The **Patient List** page has search feature for searching specific patients and pagination to navigate through the list. **Patient Files Page** is where the collection of treatment documents of the patient.

* 1. **Creating new patient**

To create new patient, navigate to Home>Patient List. At the page header, click the icon describing person with a plus sign to navigate to new patient data form.

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| **Steps in creating new patient** |
| 1. Fill-up all required inputs |
| 1. In signature, give device to patient/patient representative to sign the signature to give consent, make sure the patient representative is checked if the signature is not from the patient. |
| 1. In nephrologist, select an **attending**(main) nephrologist to give the selected doctor access to patient’s files and confidential data. For the **to-cover**(secondary) nephrologist, the selected doctor will access patient files but can’t view confidential data. |
| 1. In Hemodialysis Access, select atleast one from the 4 options and select its location. |
| 1. In scheduling of session, insert inputs in **Session Schedule Entry** and click **Add to schedule** to add the entry to **Session Schedule List.**  You can remove existing entries if there is a mistake and add new entry again. |
| 1. Double check all inputs and save the form. After receiving confirmation, the new entry will be added to the database then the page will redirect you to view mode of the patient data form. **The system** **automatically displays all other forms(treatment monitoring, laboratory monitoring, etc.) applicable to the patient that will serve as Patient Files after creating new patient**. |

* 1. Viewing patient data

User can view the patient data and has option to generate a signed PDF file.

* 1. Updating patient data

Updating patient data is similar to creating patient data. Refer steps from **Section V 1.1** for updating data.

* 1. Access Patient Files

Most user can access patient files, please refer to **Section IV** for guidance.

1. **Hemodialysis Treatment**

Has special rule applied in creating new entry, add new entry button is enabled when there is no ongoing entries found on the current patient selected, otherwise, it is disabled until the ongoing form is finalized then the new entry button will be enabled again. Additional info is displayed in each entry which is entry status describing whether it is ongoing or finish.

2.1Viewing nurse endorsement/doctor order in pinned post

Viewing nurse endorsement or doctor order of the selected patient can be done on create, view and edit mode of the treatment monitoring by clicking the paper icon beside the option menu at the page header. To update the pinned post, click the refresh button beside the pop-up form title.

2.2 Creating new entry

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| **Steps in creating new treatment monitoring entry** |
| 1. Fill-up all required common inputs |
| 1. In weight, only pre weight, dry weight and post weight can be inserted. Weight gain is automatically calculated using Pre weight and dry weight values. |
| 1. In dialyzer log, you can make history list of dialyzer data recorded during the session. To create new entry, click Add new dialyzer entry, follow the stepper form to guide you to creating dialyzer entry. After you apply 4 steps, verify yourself as the creator of the new entry by selecting your name in the nurse input and enter you account’s password. After submitting and confirming, the new entry is added to dialyzer log. You can remove also the newly created entry on that checking session if there is a mistake until temporary save is initiated. The next checking session will disable Remove button on existing entries that will proof as correct data. |
| 1. In **Vital Signs** and **HD Assessment Information**, there are two tabs available to be switch namely **PRE** and **POST**. **Don’t forget** to fill-up these data. |
| 1. In form’s doctor order and nurse endorsement, not on pinned post, the doctor/nurse can insert input to doctor order and nurse can insert input in nurse endorsement. Verify input entry by clicking the verify button on each respective area. Take note that once verified, the selected verified entry is finalized and can’t be edited anymore. |
| 1. In medication list and Intradialysis Monitoring, click the new entry button and fill-up all required inputs. Verify entry by selecting the name as entry creator and enter account password. After submitting and confirming, the new entry is added to the list. You can remove also the newly created entry on that checking session if there is a mistake until temporary save is initiated. The next checking session will disable Remove button on existing entries that will proof as correct data. |
| 1. Double check all inputs and save the form. In the **first checking session/new entry creation**, **two save options** are **available**, **Save** and **“Save and Lock”** option. **“Save and Lock”** option will ask you to enter this entry password so the user who know the password can access the locked entry then sets the status **Ongoing** and saves the entry and can be edited later. In the **second/Nth checking session**, **three save options** are **available**, **Save** , **“Save and Lock”**, and **“Save and Finalize”** option. **“Save and Finalize”** option saves the entry and sets it as **“Finish”**. After receiving confirmation, the new entry will be added to the database then the page will redirect you to view mode of the patient data form. |

2.3 Viewing the treatment monitoring form

User can the selected entry can be edited or generate PDF depending on form status and mode.

Ongoing status – can be viewed and can be edited, and PDF generation is disabled.

Finish status – view only and PDF generation is enabled.

2.4 Updating the treatment monitoring form

Refer steps from **Section V 2.2** for updating data.

**3.) Nurse Endorsement and Doctor Order in Pinned Post**

Both nurse endorsement and doctor order feature are similar and they serve as post-like functionality where the nurse or doctor creates post for the nurses to see important notes, procedure, remarks or instruction regarding to the selected patient. Take note that nurse endorsement/doctor order in pinned post are viewing only and in treatment monitoring entry are the actual inputs of nurse and doctor during the checking session. To locate Nurse endorsement and doctor order, navigate to Patient List > Select any patient > Treatment Monitoring > Create or Select any entry then at the right side of the form’s page header click the first button describing a paper on the right before the option button.

3.1 Creating a Post in Nurse Endorsement/Doctor Order Post

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| **Nurse and Doctor** |
| 1. Click the new entry button that has image of a paper located on page header. |
| 1. Select post status:   **Publish** – automatically visible to any nurses and doctors on selected patient  **Schedule** – post is not visible to any nurses and doctors until the scheduled date to live. |
| 1. Insert inputs in endorsement(nurse) or order(doctor) |
| 1. Save the form to add in the database |

3.2 Updating a Post in Nurse Endorsement/Doctor Order Post

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| **Nurse and Doctor** |
| 1. Select any existing entry to view. |
| 1. Click the edit button to proceed edit mode |
| 1. Select post status:   **Publish** – automatically visible to any nurses and doctors on selected patient  **Schedule** – post is not visible to any nurses and doctors until the scheduled date to live. |
| 1. Insert inputs in endorsement(nurse) or order(doctor) |
| 1. Save the form to add in the database |

**4.) Consent to Care**

Consent to care entry are valid for 6 months, nurses can’t create new ones until the latest entry is nearing its due date. Validity date is auto generated when creating new entry. Existing consent to care entries can’t be edited anymore once it is saved so be sure to check every input.

4.1 Creating new Consent to care entry

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| **Head Nurse and Nurse** |
| 1. ) In witnesses, the first entry will always be the user who logged in and initiated create mode, user may add one more witness at max of two witnesses |
| 2. Double check inputs then save the form. |

**5.) Hemodialysis Order**

Similar to Consent to Care, hemodialysis order are valid for 3 months. Nurses can’t create new ones until the latest entry is nearing its due date. Validity date is auto generated when creating new entry. Existing hemodialysis order entries can be edited anytime with the exception of the validity date. For every edit, the nephrologist will be reset to unverified when saved, be sure to let the attending nephrologist verify.

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| **Head Nurse and Nurse** |
| 1. ) Fill-up all required common inputs |
| 2. In nephrologist, the assigned doctor may verify during the entry creation or later. Take note, make sure that the assigned doctor verifies it or else PDF generate is disabled. |
| 3. Double check inputs then save the form. |

**6.) Diagnostic Procedure**

Doctor and nurses are able to create/edit diagnostic procedure. Also they can upload an image to the entry up to five only.

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| **Doctor and Nurse(All)** |
| 1. Select type of diagnostic procedure. |
| 2. When user select atleast one type, input will be visible to enter. Be sure to fill-it. |
| 3. Upload an image to further reinforce clarity of the entry. |
| 4. Double check inputs then save the form. |

**7.) Laboratory Monitoring**

Displays the list of laboratory monitoring entries by date created up to 4 column for comparison.

7.1 Creating Laboratory Monitoring

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| **Nurse(All)** |
| 1. Click the option button and select new entry button to create. |
| 2. Fill-up common inputs |
| 3. HIV inputs is available only to head nurse and attending nephrologist only. |
| 4. Double check inputs then save the form. |

**8.) Problem List, Medication List, Vaccination Record, Hospitalization History**

These four forms has similar functionalities. Click new entry button to show new entry form then fill up the inputs. After checking the inputs, save the entry and wait for the list to be updated. Vaccination record is special where the user assigned in the created entry must verify.

**9.) Dietary Prescription**

Accessible to doctors, dieticians and nurses (all). Only doctors and dieticians can create or edit Dietary Prescriptionentry that contains list of diet entries. In doctor and dietician, entries created are visible only to the creators while the nurses (all) can view and generate pdf all the created dietary prescription.

**10.) Medical Abstract**

Accessible to doctors, and nurses (all). Only doctors can create and edit medical abstract while nurses can view all entries created only.

**11. REDCOP**

After creation of new patient data, REDCOP is not yet accessible to doctors because it needs further details to be filled-up. Only nurses (all) can create REDCOP entry of the selected patient. After creating the entry, it will be accessible to doctors.

**12. Blood Transfusion Monitoring**

Similar to laboratory monitoring display of list. It shows vertical list of detailed entries up to two rows for comparison.

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| **Nurse(All)** |
| 1. ) Click the option button and select new entry button to create. |
| 2. Fill-up common inputs |
| 3. In checked by list, up to two entries will be created and to be verified by the user who checks the monitoring. |
| 4. In Monitoring started and completed, only one entry will be created and to be verified by the user who started/completed the monitoring. |
| 4. Double check inputs then save the form. |

**13. Prescription**

Accessible to doctors and nurses(all). Only doctors can create new prescription entries.

13.1 Creating new prescription entry

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| **Doctor** |
| 1. At Prescription list page, click paper button to create new prescription. |
| 2. Fill-up date and add new medication entry by clicking the add medication entry button.  Medication entries can be up to 7 only. You may edit or remove a medication entry if necessary. |
| 3. Double check inputs then save the form. |

**Note:** To edit existing prescription entry, select any existing entry and follow step 2 to 3 on **Section V 13.1**.

**14. Patient Survey**

Nurses conduct survey to patients every month collecting useful data. The collected data is used for creating new techniques and improves services offered by the center. To conduct survey, navigate to patient survey page and follow the steps below

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| **Steps to create survey** |
| 1.) Create new survey collection by clicking the new collection button located at the right side of the page header. If monthly survey collection is already created then skip to step 3. |
| 2.) Fill-up month and year of survey collection then save to navigate to newly created collection. |
| 3.) TO create new survey of the selected month survey collection, click the new survey button located at page header then the user will be navigated to survey page’s terms. Let the patient read the terms and fill-up survey questions and also the nurse can guide if he/she has difficulty answering. |
| 4. If patient is done filling-up survey questionnaire then save the form to finish. |

**15. Daily Water Treatment Monitoring, Refrigerator Monitoring, Room Temperature Monitoring, Daily Equipment Monitoring**

These four forms have similar functionality. Each form can create 1 month of monitoring that contains 31 day entries for the technician to record data into it. To create monthly monitoring collection, click the new collection button located at the page header and fill-up month and year of monitoring entry then it will navigate to the newly created monitoring and can start recording data into it. Technician and head nurse can manage the 4 forms but the head nurse role is to check the data recorded only.

**NOTE:** Remember that always save the form by clicking the save button located at the page header to save all changes in the form cause the entering data into a selected day entry only updates the day entry and doesn’t automatically save the form.

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| **Daily Water Treatment** |
| 1. Select any day for data recording. User can double click a day entry or swipe the table to the left and click a day entry’s edit link to open a form and enter data. |
| 2. Save data entered and click the save form button located at the page header to save changes. In case  To insert checker data in day entry, must login as head nurse and click edit form then save the data entry to insert nurse name into checker’s name in the selected entry. |

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| **Refrigerator and Room Temperature Monitoring** |
| 1. Select any day for data recording. Click edit link to open a form and enter data. |
| 2. Save data entered and click the save form button located at the page header to save changes. |

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| **Daily Equipment Monitoring** |
| 1. If first time using daily equipment monitoring, add new entries of equipments to be monitored daily, click the option button and select view equipments stored. If not it not first time and already have entries of equipment saved then skip to step 3. |
| 2. To create new equipment entry, click the option button again and select new equipment then enter equipment name, unique serial number and select whether the new entry will be automatically created at new monthly monitoring form or not then add. After adding new entry, save the form by clicking the option button again and click save. |
| 3. If you are at the equipment stored page, go back one level to daily equipment page. If already at daily equipment page, you may select an existing monthly equipment monitoring entry or create new one. To create, click option button and select monitoring entry then fill-up month and year of monitoring entry and save to navigate automatically to monitoring form. |
| 4. Select any day for data recording. User can double click a day entry or swipe the table to the left and click a day entry’s edit link to open a form and enter data. |
| 5. Optional: You may add existing equipment into selected monthly monitoring form by clicking option button and select add an equipment into list. A form will show up asking you to select an equipment from the dropdown list to add into the list. The items in the dropdown are the items created in the equipment stored page. If no items in the dropdown, you may need to add new equipment entry in the equipment stored page. |
| 5. Save data entered and click the save form button located at the page header to save changes. |