STERILIZATION PORTAL

USER MANUAL

STERISMART
Intelligent Log Management Solution

Company Information

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User Manual Version 1.00

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1 Introduction

1.1 Sterismart

Sterismart is part of the Hatch group of companies and is the software department. The sterilization portal is part of the Sterilization Suite built by Sterismart. For your patients, your team and your clinic!

The sterilization portal is one stop for all sterilization logs. Cycle number, temperature and pressure, lot number and type of load, biological indicator test and additional data in one software. Log cycle data and create unique barcode for every cycle. Scan the barcode and attach to client file in your patient management system.

1.1.1 Documented safety

The infection prevention and control, compliance and new technologies have changed the landscape of today's dental procedures. We have created the tool that will enhance and enable resources to complete the sterilization process under compliant rules. The Sterilization portal is the first choice for safe and professional documentation across the whole instrument treatment process. All process steps, logs and data are fully documented and archived securely. All logs and data entries are fully documented and archived securely. A report is created and sent as a tamper-proof PDF.

This will enable the dental office to ensure all logs and data are following regulations by public health, stored securely and provided by request to the public health authorities and patient. Barcode labels can then be printed and placed on the loads to facilitate traceability of the individual load elements. This can be read-in via a scanner and added to the patient administration system.

1.2 Sterilization Portal

The Sterilization Portal helps simplify sterilization data logging and management of log data as it compiles daily logs on autoclave cycles and biological indicator (B. I.) tests.

All in one place. Secure. In the local storage and designed to increase the efficiency and effectiveness of the workflows in dental offices of all sizes.

Sterismart delivers more functionality and value than our competition by the ability to use data from all autoclaves used by healthcare professionals.

- **Secure**

The login is secured by office ID and PIN. All reports contain all operators involved in the cycle.

- **Cycle Data, B. I. Test Report**

On completion of the cycle, you enter all the necessary data in the cycle log. Parameters are cleaning method, package ID(s), packages (name, type and number), autoclave name, cycle

number, temperature, pressure and chemical test results. The Sterilization Portal will store your results and attach them to the cycle report for the autoclave. The B. I. report data is stored and attached to the cycle logs of the autoclave. The Bowie Dick test for class B autoclaves is also recorded.

- **Barcode Tracking**

The system generates a barcode (or you can use pre-printed barcode labels) and your entry is complete. Simple, easy and quick. Print the barcode labels and apply to your sterilized packaging and store if not used immediately. Add the barcode to the patient file.

- **Reporting**

Sterismart creates sterilization reports that are compliant with Health Regulations and provides traceability report of sterilization cycle records. The Sterilization Portal will store your results and attach them to the cycle report for the autoclave.

The options for the reports are:

Cycle Report. You can generate cycle reports daily, by date Range, by autoclave, by sterilization user, by biological indicator test user or by package ID (barcode).

All reports are formatted to simplify the overview and have initials and signatures of operators and Managers.

2 Getting Started

2.1 System Setup

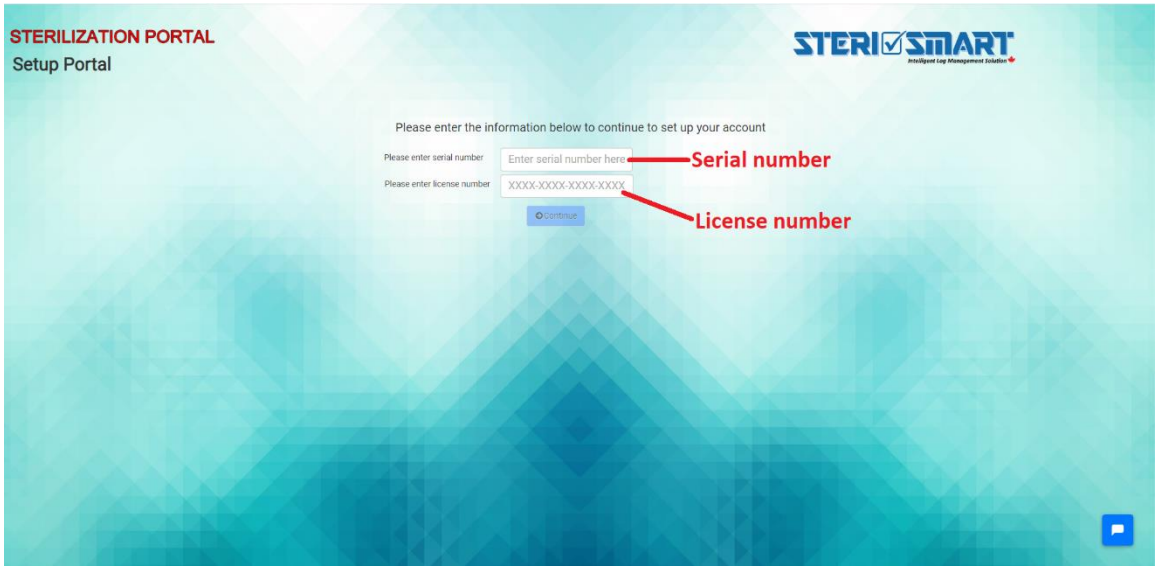
1. Please place the tablet in the position and place you wish to use
2. Please have a power outlet close to the unit
3. Please power on the system
4. Please click on the icon for the Sterismart software.

2.2 Registration

To start using the Sterilization Portal, you need to register your office. Please go to: https://sterilizationportal.sterismart.ca. You will be taken to the sterilization portal where you can complete your registration

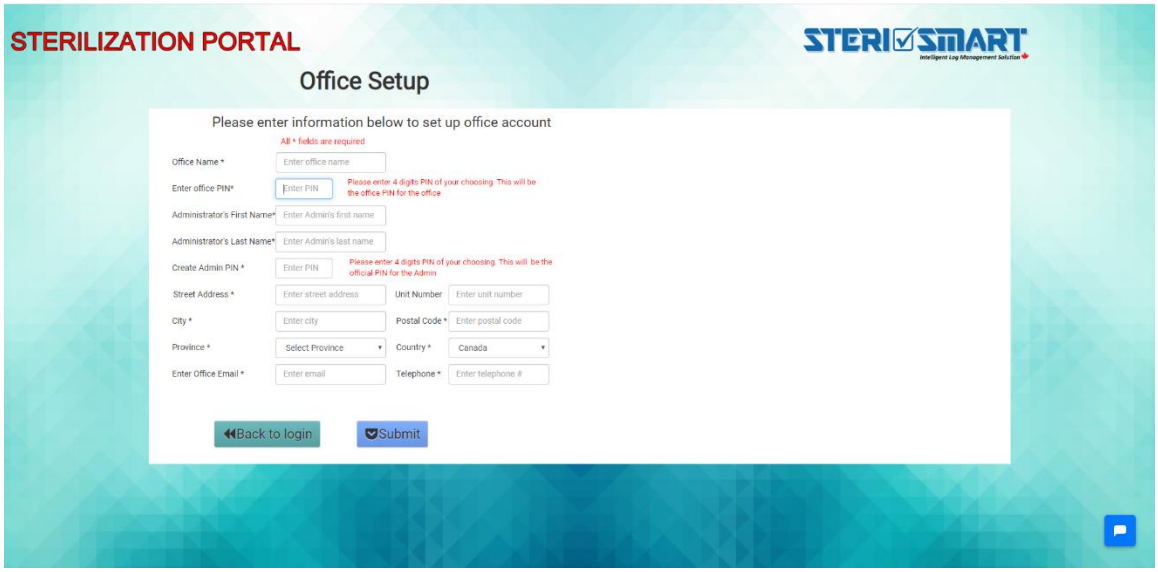
2.4 Registration Login

1. From the documentation provided, you will find the serial number and license number to be used for your office set up.
2. Enter your serial number and license number.
3. Once you enter the serial number and the license number click on the continue button to login.

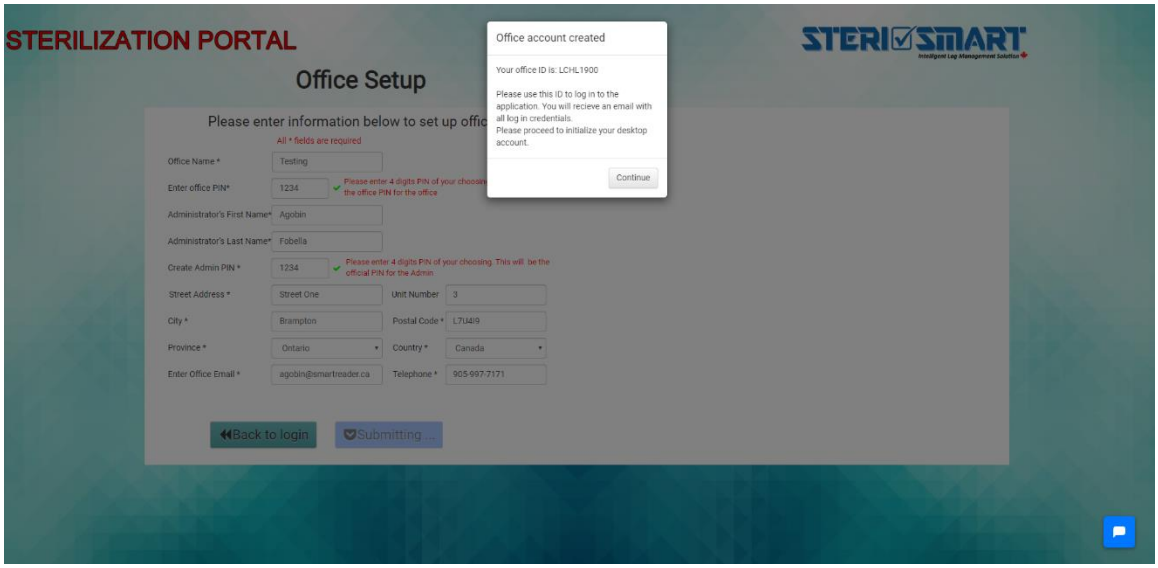


4. After successfully logging in, you will be taken to the office setup page. Please enter all the information requested.

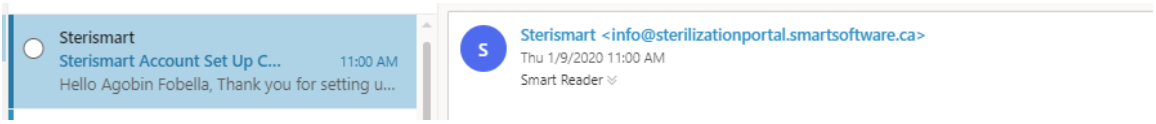
5. Enter office name, example Smart Dental Mississauga.



6. Enter a 4-digit pin to be used as office pin for login purpose. This pin will be shared with operators. Example 1234. Please make it a number that is easily remembered.
7. Please enter the Administrator First Name and Last Name.
8. Create the admin pin. This pin is NOT to be shared with operators. This is the admin pin. It will be used to access the administrative functions of Sterismart.
9. Please enter the street address, the unit number, city and the postal code, Province and the Country.
10. Please enter the main office email and telephone number for communication.
11. When all data is entered, please review and if all good, click on Submit.
12. Upon successful submission, you will get your office ID. This will send an email with information submitted in the form.



13. Please note the office ID, as this is the primary login ID you will need. This information is also in the email.
14. You will then returned to the Setup Portal login page.
15. You will receive the confirmation email from the system.



The confirmation email will send the following information:

Hello Agobin Fobella,

Thank you for setting up your Sterismart account. Please find below your login information.

Office ID: LCHL1900,
Office PIN: 1234,
Administrator: Agobin Fobella,
Administrator's PIN: 1234.

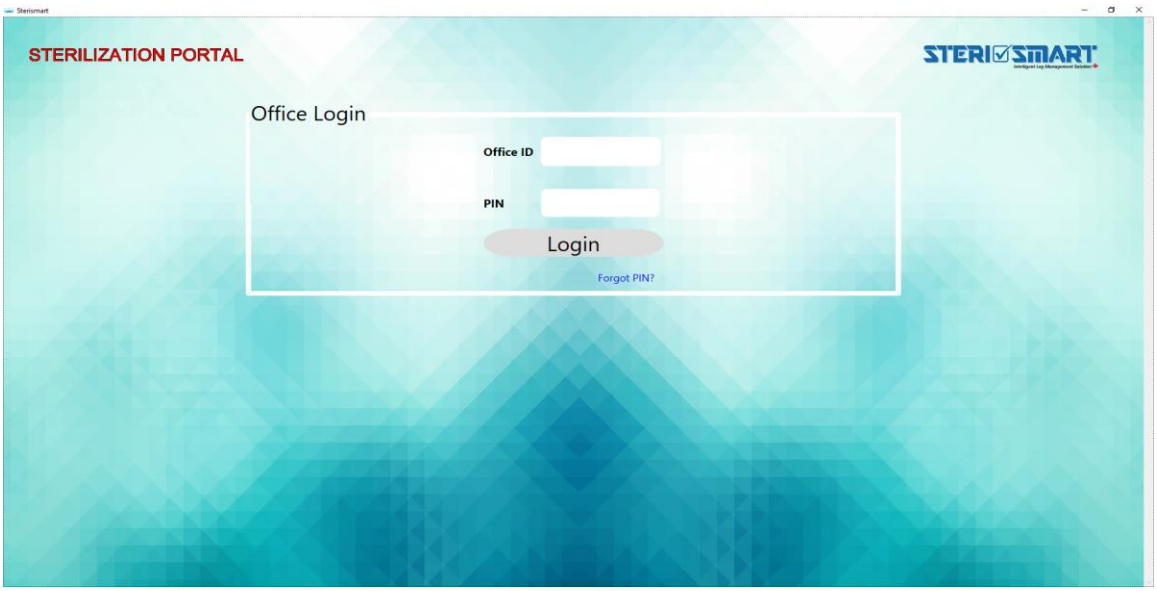
Your account is now ready for use, please proceed to initialize your desktop account.
Sterismart Team.

Please print the email and consider it confidential. You will need the Office ID and Office PIN to log into the application. The administrator's PIN is for the administrator for setup and changes, as well as for work with the application.

2.5 First Login

Before you login in the desktop application, you will need to initialize your office. To do this, enter your office ID and PIN, you will be prompted, if you want to initialize your office, select yes. Office initialization will start. Upon successful initialization, you will be asked to login again to complete set up.

1. Please use your office ID and office PIN number to log into the application. Enter your office ID and PIN in their respective boxes and click on Login.



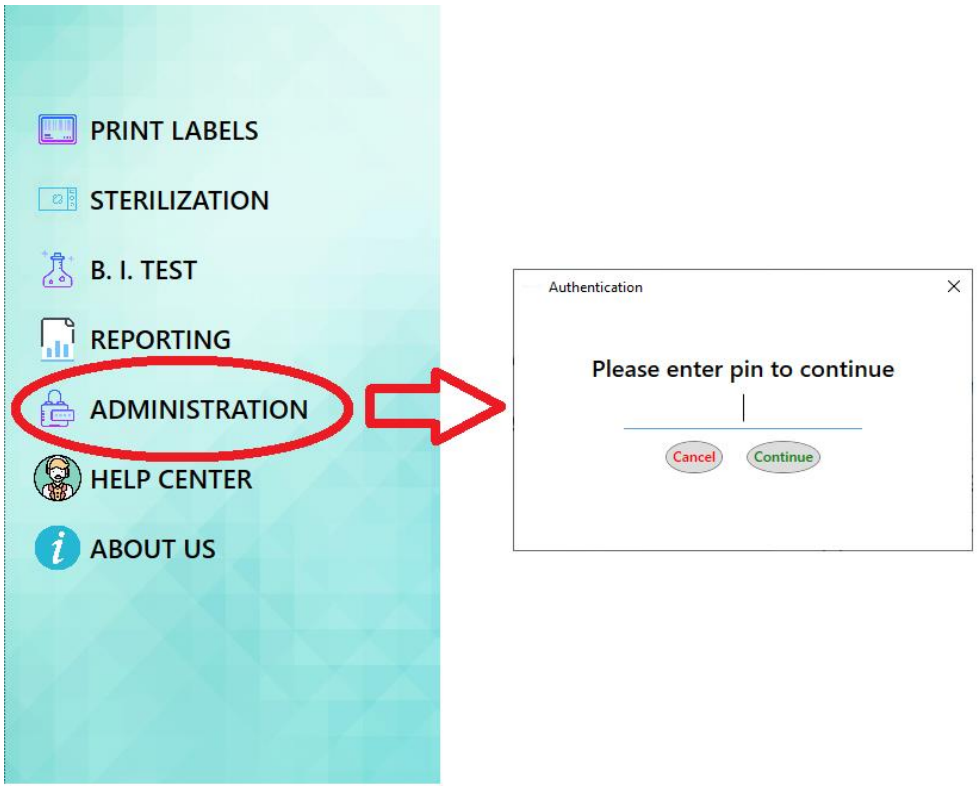
2. Upon successful login, you will be redirected to the administrator setup of the application where you will configure the software based on your office requirements.

3 Administration

3.1 Administration Login

The administrator can log into the admin login to perform changes, updates and deletes.

1. Click on the Administration button
2. Popup with request for PIN will show
3. Enter your administrator PIN
4. After a successful login, you will be redirected to the administration section



3.2 Setup/Change Office Information

In this section, you can modify your office information.

1. Please review office information
2. Click on the field you wish to change
3. After making changes, click on the Update Information button to update your office information.
4. Upon successful update, you will receive a notification that all changes have been successfully saved.

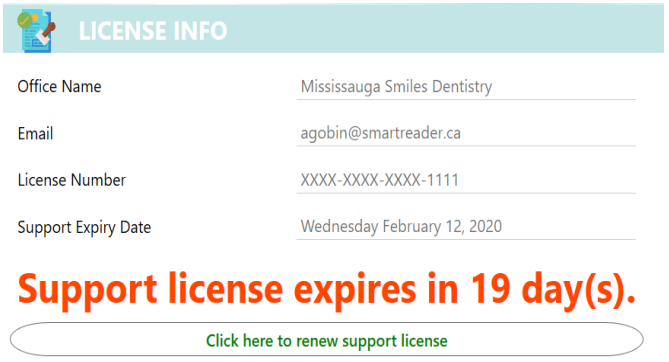
3.3 View Support License Information

With a valid support license, you will be able to get support for any issues that arise when you use the software. When you license expires, you will be required to renew it to continue receiving support.

1. This page shows the support license information of your office
2. You cannot change any information on this page
3. Once your license is 30 days or less from expiring, you will receive a notification and will be reminded by the app for renewal.
4. When your license expires, you will be directed to the renew license page where you will be able to renew your license.

5. You can also renew your support license from within the application. When your license is 30 day or less from expiring, the **"Click here to renew support license"** becomes active.

6. To renew your support license, click on the renew button and follow the instructions to extend your support license.

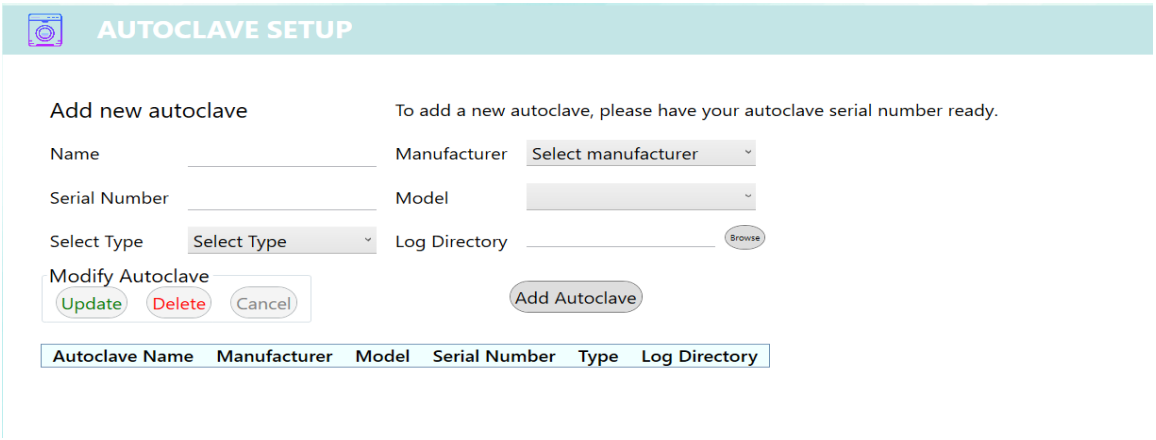


3.4 Setup Autoclave Information

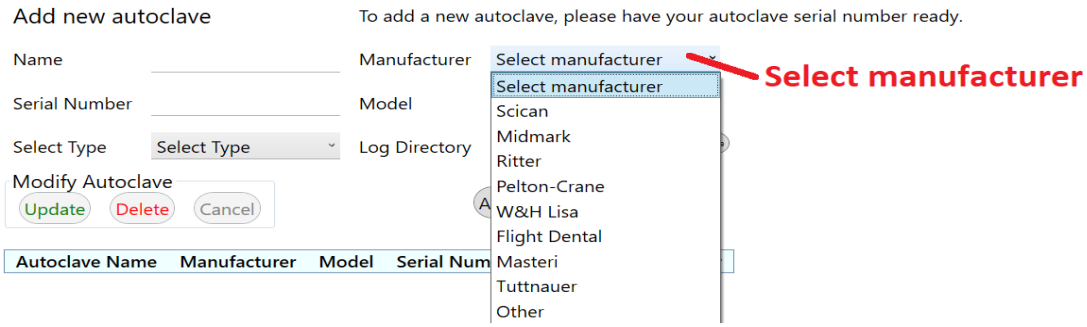
On this page you can add, edit or delete your autoclaves.

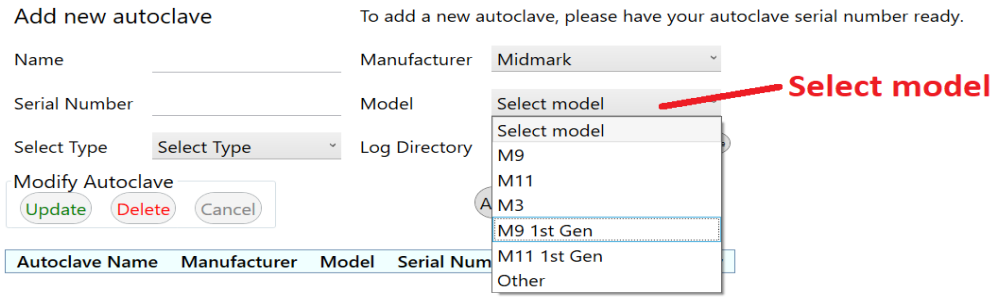
3.4.1 Add Autoclave

1. To add a new autoclave, please enter the preferred name for your autoclave. (Example Midmark A. Midmark 9, e.t.c) - This is the name your office prefers to call the autoclave.

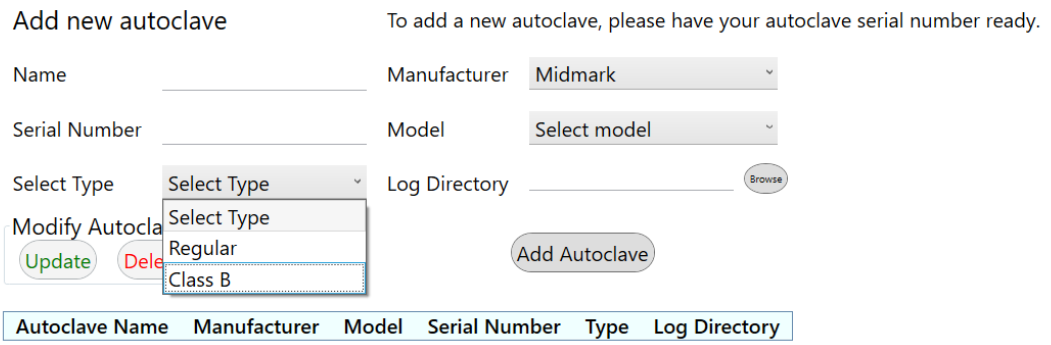


2. Choose the Manufacturer and Model

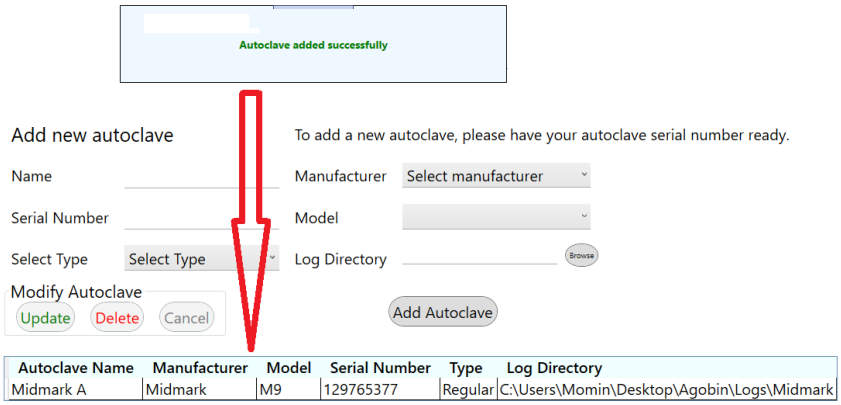




3. Enter the serial number of your autoclave (Please find it in the autoclave's manufacturer manual, manufacturer documentation or on the device)
4. Choose the type of autoclave (Regular or Class B)



5. If Class B chosen, the Bowie Dick test becomes activated in the load management.
6. The Log directory is the location of where the logs are stored. With our Smart Reader wireless office setup, the directory where the logs of an autoclave are stored can be linked to the autoclave in the software. If set, the software automatically reads the most recent log file whenever the autoclave is selected in the sterilization stage. If the location is known, click on the browse button to select the log directory. If your office doesn't have our Smartreader wireless office setup, leave this field black.
7. After all the input has been added and verified, click on the **Add Autoclave** button to add the autoclave.
8. You will receive a notification that the autoclave has been successfully added.



3.4.2 Missing Autoclave Manufacturer and/or Model

1. If your autoclave's manufacturer or model is not in the list you can add it to the list by choosing other in the manufacturer or model list. After selecting other, an input field would appear, enter the manufacture and/or model.

3.4.3 Edit Autoclave

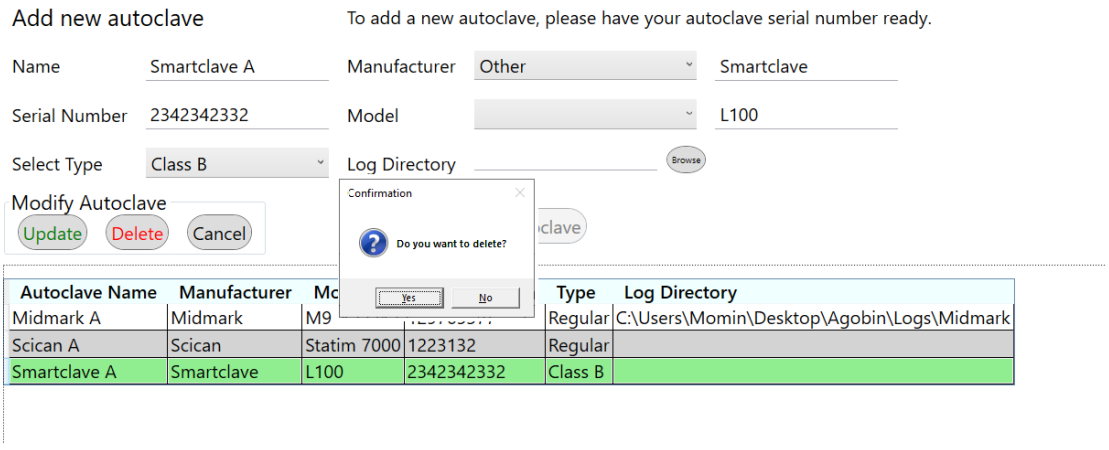
If the information for your autoclave is not correct, you can edit the information

1. Select the autoclave from the list.
2. Enter the new information. The name, serial number, manufacturer, model, type and log directory can be changed.
3. Click on the update button to update the autoclave's information.

3.4.4 Delete Autoclave

If your autoclave is not in use anymore, you can delete the autoclave.

1. Select the autoclave from the list you want to delete.
2. Click on the delete button.
3. You will be prompted to confirm if you want to delete the autoclave.
4. Click yes to confirm.
5. The autoclave will be deleted and removed from the list.
6. You will receive a notification that autoclave has been successfully added.
7. Though the autoclave has been deleted, sterilization reports of the autoclave will still be available.

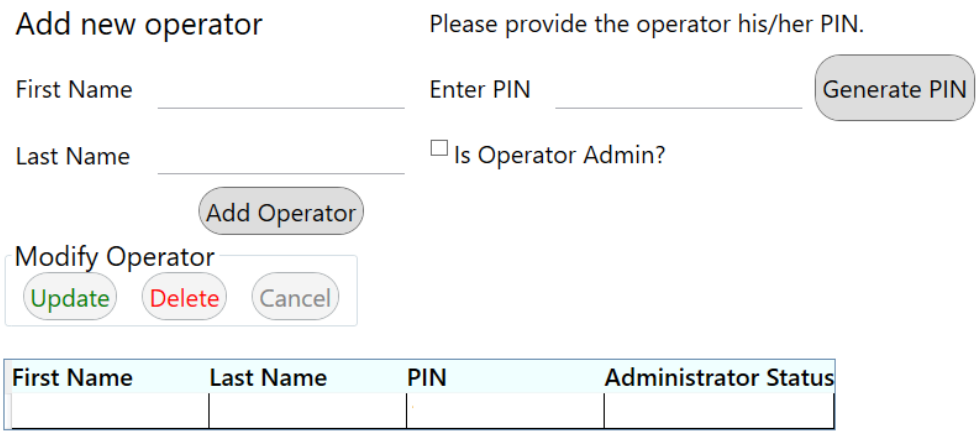


3.5 Setup Operator Information

On this page you will add, delete or change information for your operators.

3.5.1 Add Operator

1. To add operator, please enter first name and last name.
2. Enter the PIN for the operator or click on the generate PIN button to generate a unique PIN for the operator.
3. To make an operator an administrator (this will give the operator administrator privileges to change information in the admin panel), click on the “Is Operator Admin?” checkbox.

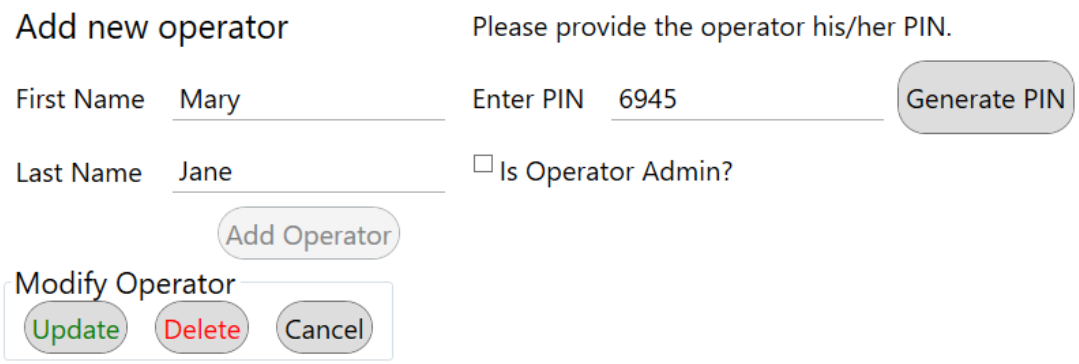


4. Click the Add Operator button.
5. You will receive a notification that operator has been successfully added.
6. You have completed the operator entry.
7. Please add all operators that will be using the system.
8. If an operator is an administrator, please provide pin to the operator for the operator to be able to access the admin panel of the application.

3.5.2 Edit Operator

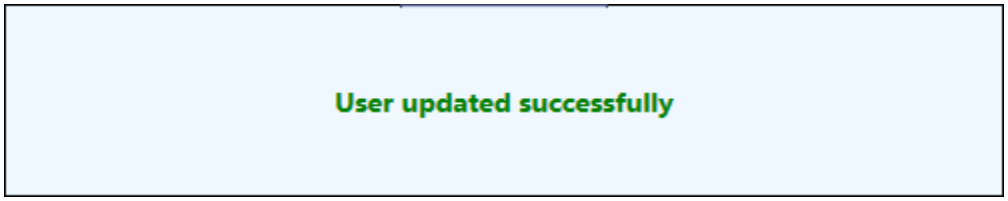
You can edit operators selecting the operator from the list.

1. Select the operator you wish to edit on the list.



First Name	Last Name	PIN	Administrator Status
John	Doe	1234	1
Mary	Jane	6945	0

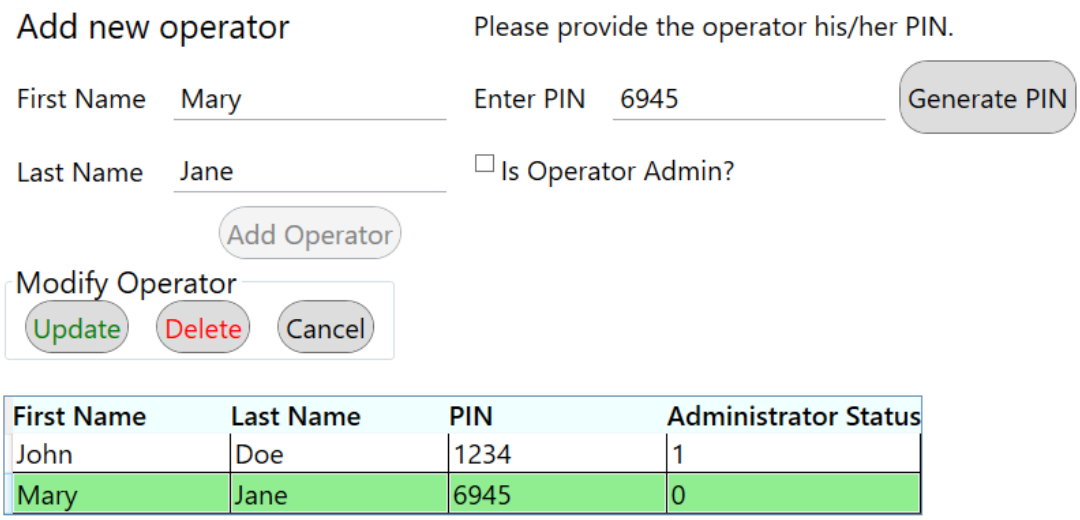
2. Click on the field you wish to change.
3. Enter the new information.
4. Once you have completed all the changes, click on the update button.
5. You will receive a notification confirming that the operator has been updated.



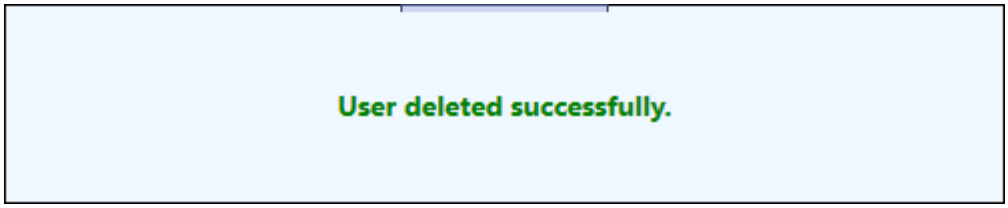
3.5.3 Delete Operator

To delete an operator, select the operator you wish to delete from the list.

1. Select the operator you wish to delete on the list.



2. Click on the Delete button.
3. You will be asked for confirmation if you want to proceed to delete the operator.
4. Click yes to delete the operator.
5. The operator will be deleted and you will receive a confirmation that the operator was successfully deleted.



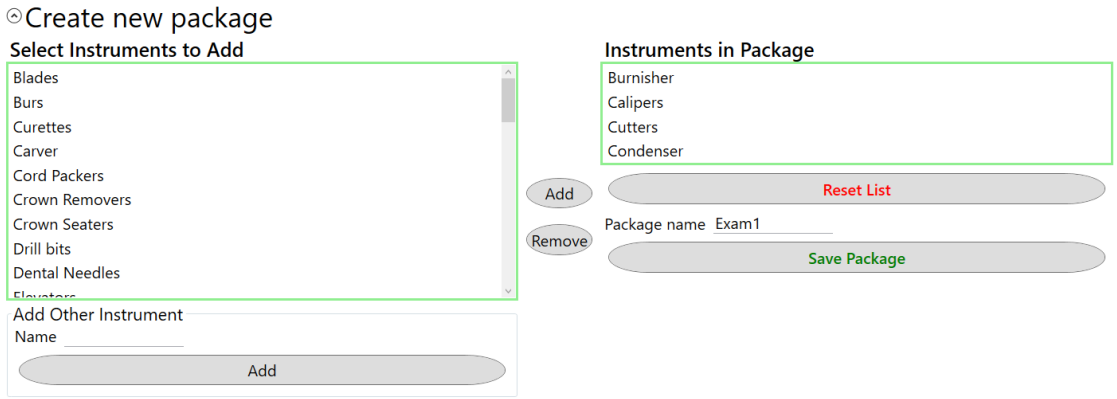
6. Though an operator has been deleted, all the sterilization records linked to that particular operator will still be available in the reports section.

3.6 Manage Packages

3.6.1 Creating new packages.

To create a new package:

1. Select instrument names from the instruments list and click on add. If an instrument is not in the list, enter the instrument name in the other instrument name box and click on the **Add** button. Adding instruments to the package is optional.
2. To remove an instrument from the package instruments list, select the instrument name and click on the **Remove** button.
3. To remove all instruments from the package instruments list, click on the **Reset List** button.
4. Adding instruments is an optional procedure. Packages can be created with just the package name, not adding any instruments.
5. Enter the package name.
6. Click on **Save Package** button to save the package.
7. You will receive a notification that the package was successfully created.



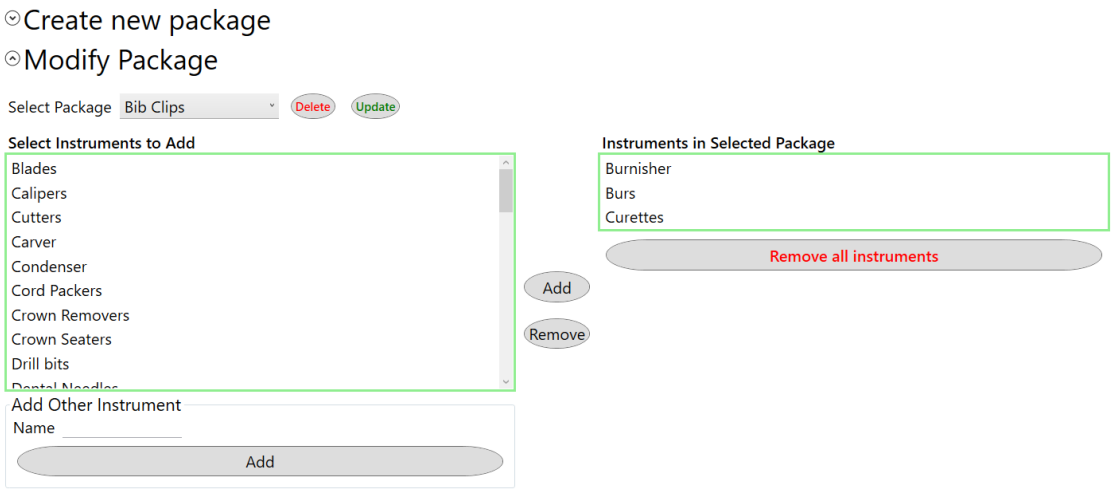
3.6.2 Modifying existing packages.

To update a package:

1. Select the package name from the select package drop down box.
2. To add instruments to the package, select the instruments from the Instruments to Add list and click on the Add button.
3. If an instrument is not on the list, enter the instrument name in the other instrument name textbox and click on the Add button to add the instrument to the list.
4. To remove an instrument from the list, select the instrument(s) from the Instruments in selected package list and click on the Remove button to remove the package.
5. To remove all instruments from the package list, click on the Remove all instruments button.
6. After modifying the package, click on the update button.
7. You will receive a notification that the package has been updated.

To delete a package:

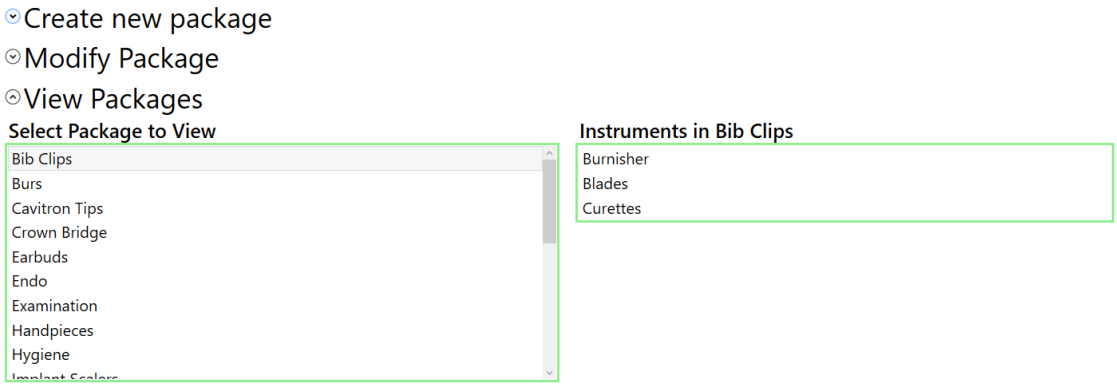
1. Select the package name from the select package drop down box.
2. Click on the Delete button.
3. You will be prompted for confirmation to delete the selected package.
4. Click yes, to continue.
5. You will receive a notification that the package has been successfully deleted.



3.6.3 Viewing packages.

To view a package:

1. Select the package name in the package list.
2. Instruments in the selected package, if any, would be displayed in the instruments in package list box.



3.7 Backup and Restore

3.7.1 Creating a backup

To create a backup of the application data:

1. Click on the Backup Data button.
2. A dialog box would open, choose the location you want to store the backup file in.
3. The system generates a name for the backup file, change the name to something else if you want to.
4. Click on the save button to save the backup in the selected location.
5. You will receive a notification that the backup was successfully created.

3.7.2 Setting up automatic backup

To set up automatic backup:

1. Click on the browse button.
2. Select the folder where you wish to store the automatic backups.
3. Click on the Ok button to choose the selected folder.
4. Click on the Update Backup Location button to set the automatic backup.
5. You will receive a notification that automatic backup has been set.

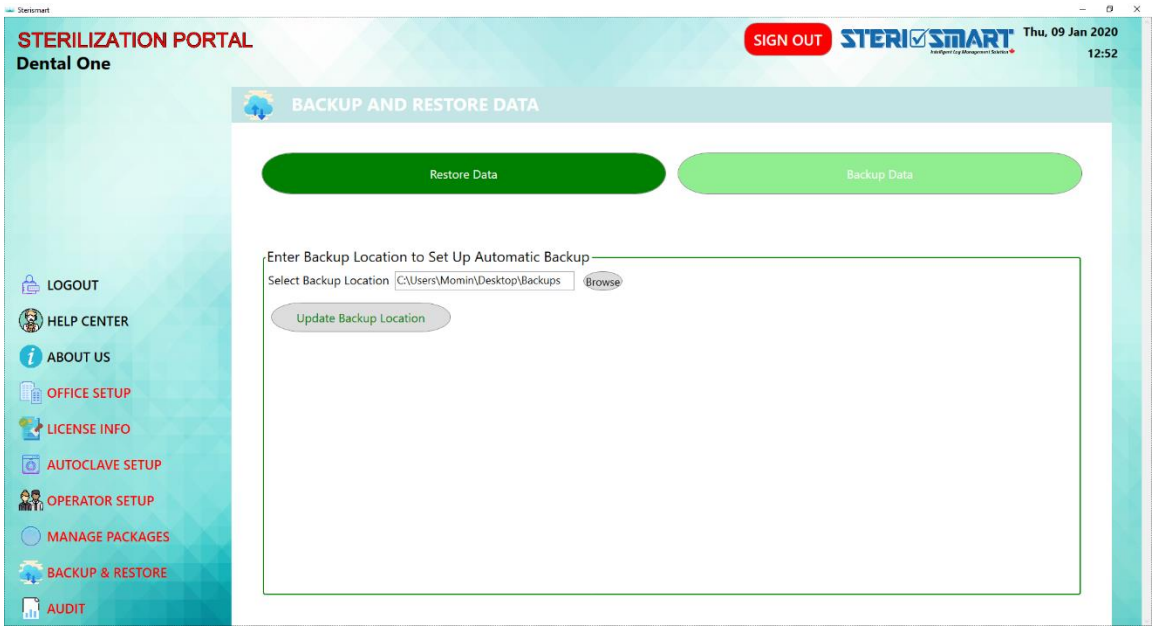
To change the automatic backup location:

1. Click on the browse button.
2. Select the folder/directory you want to change to.
3. Click on the Ok button to choose the selected folder.
4. Click on the Update Backup Location button to set the new backup location.
5. You will receive a notification that automatic backup has been set.

3.7.3 Restoring data

To restore application data:

1. Click on the Restore Data button.
2. Data restoration deletes all the application data and replaces it with the one in the backup file. This process is not reversible unless you created a backup before restoring the data. You will be prompted to provide confirmation if you want to proceed.
3. Click yes to proceed.
4. Select the backup file you wish to restore data from.
5. When the file is selected, click on the Open button.
6. You will receive a notification that data is being restored.
7. Upon successfully completion, you will receive another notification that data was successful restored.

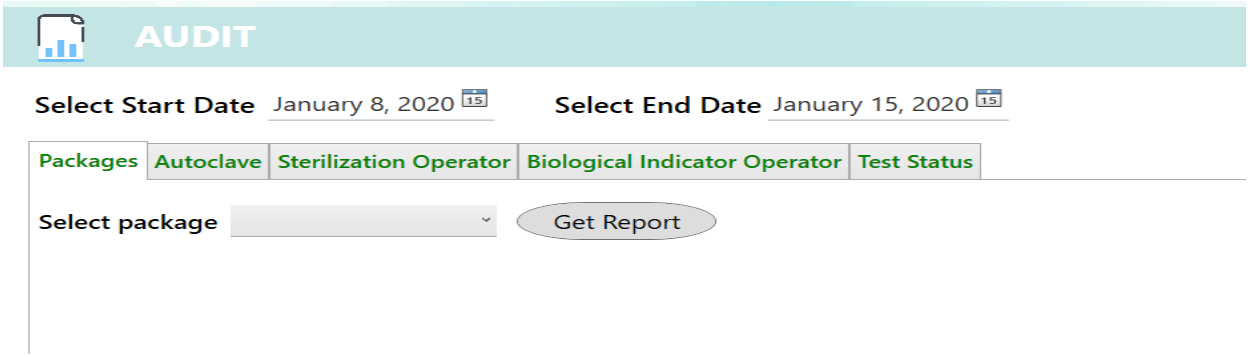


3.8 Audit

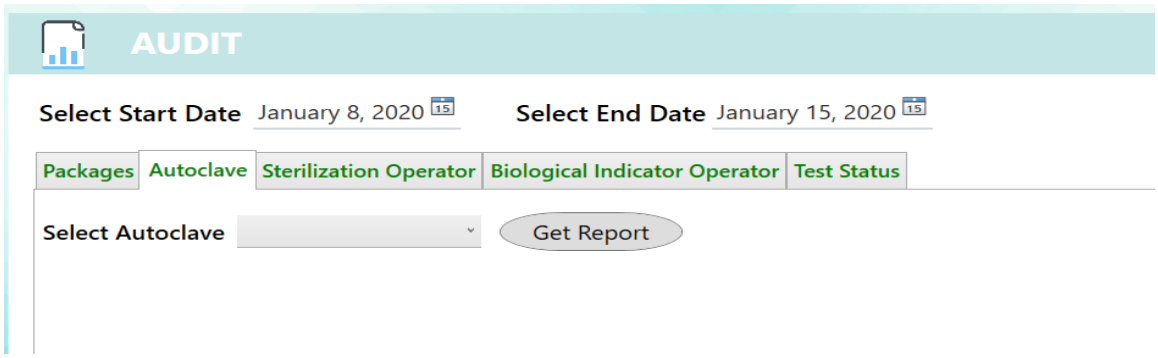
In this section, you will be able to generate audit reports within a specified date range for your packages, autoclaves, operators (sterilization and biological indicator test operators) and reports based on various test (cycle temperature, cycle pressure, chemical indicator, biological indicator, type one, type four and type five tests) pass or fail status. To generate an audit report:

1. Click on the Audit menu on the navigation bar.
2. Select the start date and the end date.

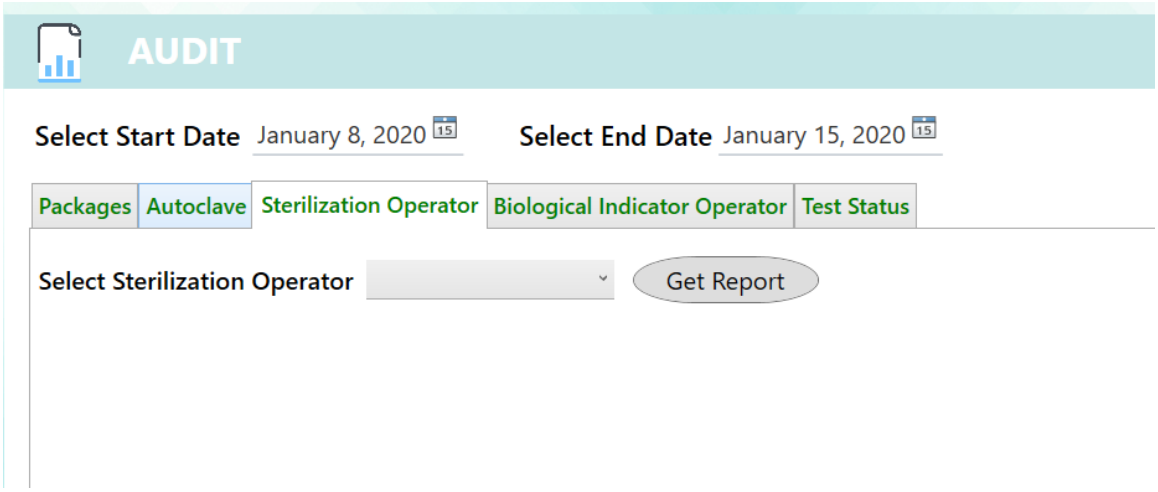
A. To generate audit report for a package within the specified date range:
   1. Select the package from the list.
   2. Click on the Get Report button.



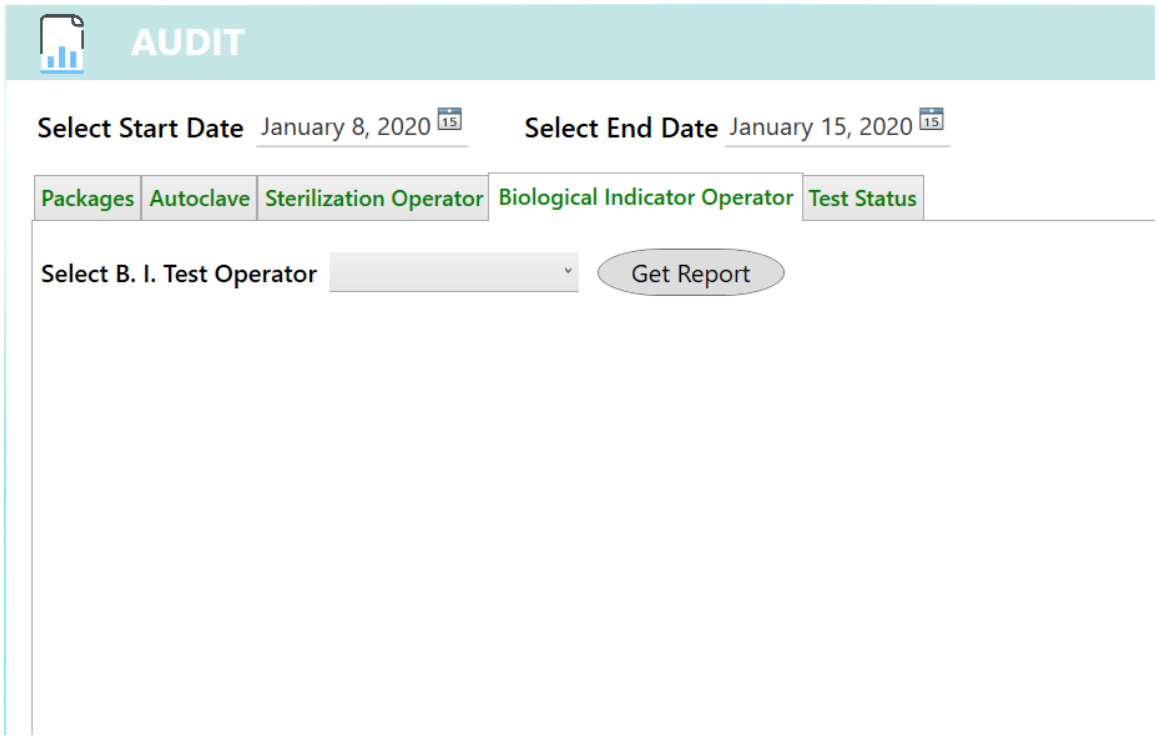
B. To generate audit report for an autoclave within the specified date range:
   1. Select the autoclave from the list.
   2. Click on the Get Report button.



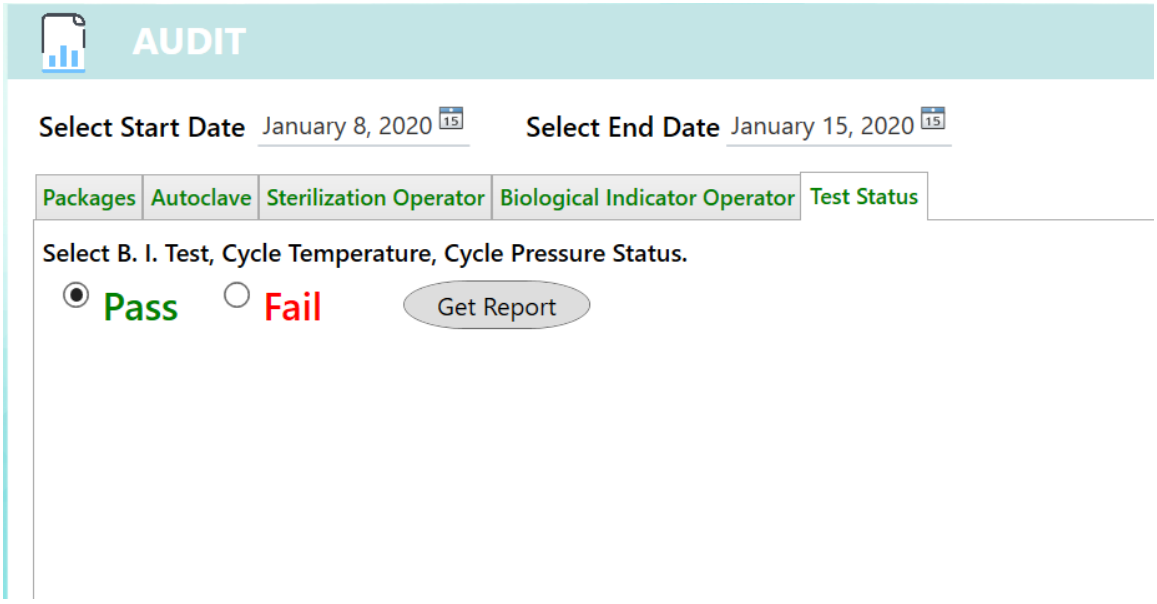
C. To generate audit report for a sterilization operator within the specified date range:
   1. Select the operator from the list.
   2. Click on the Get Report button.



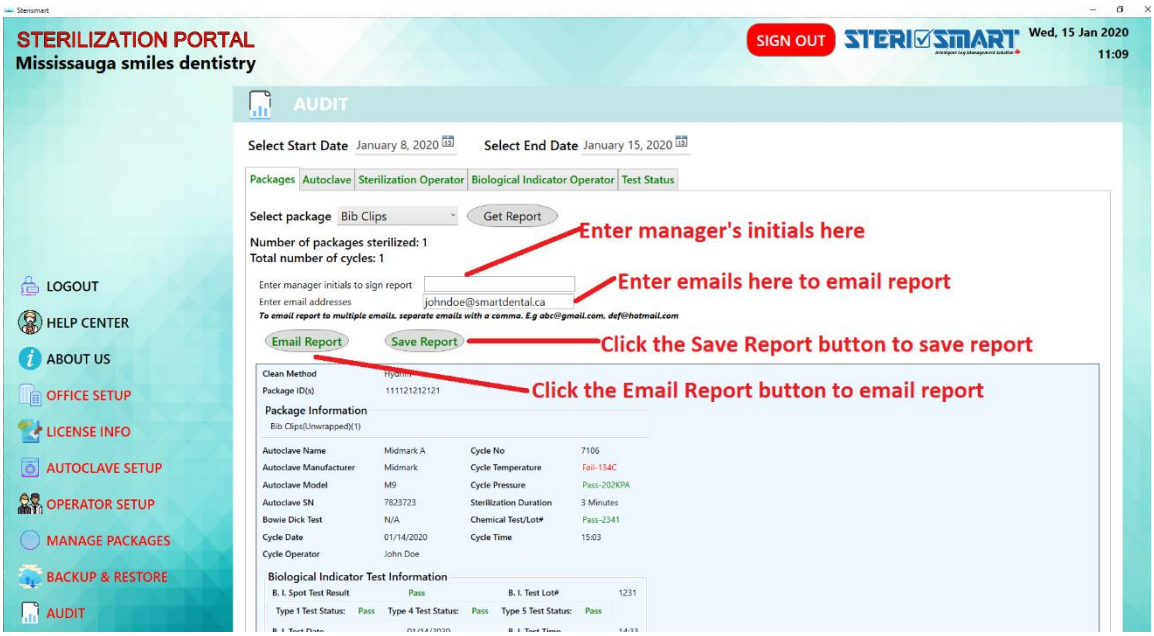
D. To generate audit report for a biological indicator test operator within the specified date range:
    1. Select the operator from the list.
    2. Click on the Get Report button.



E. To generate audit report based on the various tests pass or fail status:
    1. Select the test status, either **pass** or **fail.**
    2. Click on the Get Report button.



After the audit report has been generated, to sign the report enter the manager's initials in the appropriate text field. To email the report, enter the email(s) in the email text field and click on the Email Report button. So save the generated report locally, for example in a flash drive, click on the Save Report button. A save file dialog box will open, navigate to the location you want to store the report, enter the name of the file and click on the Save button. The report will be saved in the selected location.



You have completed the Administration setup. Please log out of the Administration setup by clicking on the Logout button on the left side of the screen. You will be returned to the home page.

The Administrator can re-log in to the administration page for changes or updates by clicking on the Administration button on the left navigation pane.

3.9 Logging Out from Administration Panel

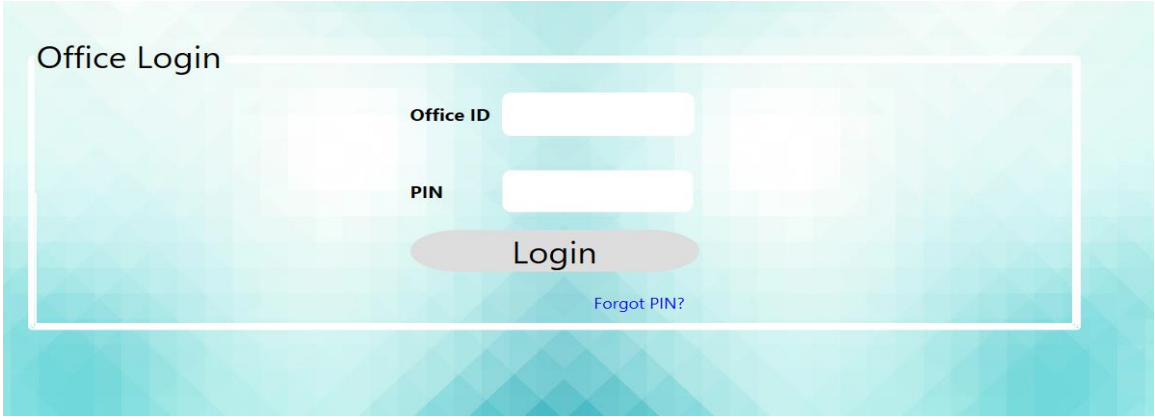
To logout from the admin panel:

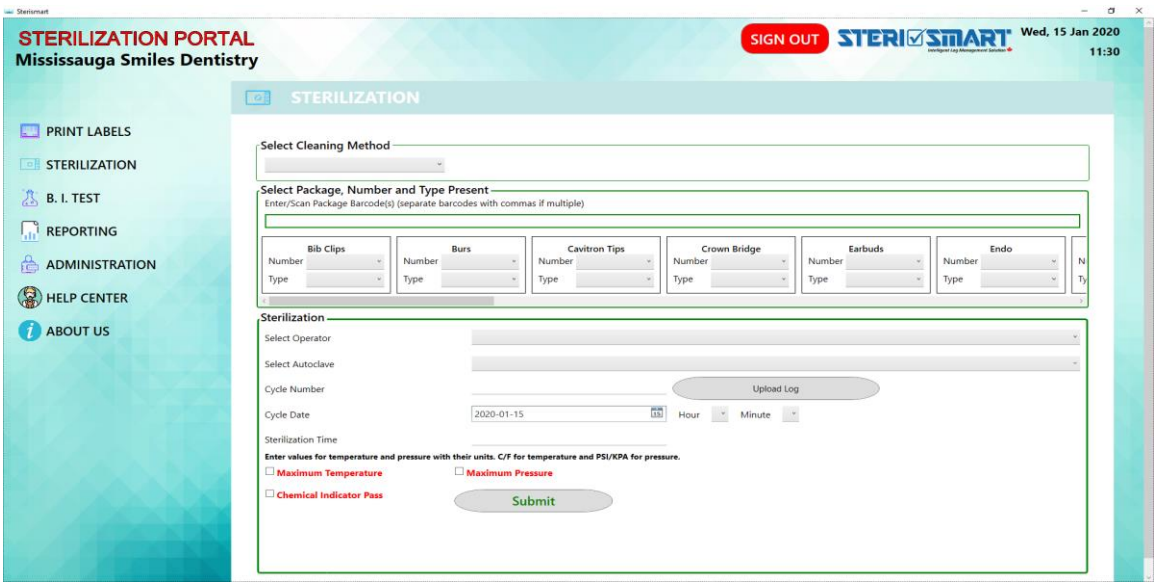
1. Click on the Logout button.
2. You will be redirected to the Sterilization page.

4 Main Menu

4.1 Login

To log into the application the operator will need the office ID and PIN. That information was sent to the administrator.





4.2 Navigation

You can use the links on the left side of the screen for navigation.

Please note that you can only see the report without the B. I. test, but to complete the report you will need the B. I. test for the autoclave completed.

No complete reports will be compiled and saved without the B. I. Test

4.2.1 Step 1 – Printing of Labels

In this step, the application generates and prints barcode labels which will be applied to all the packages before they go into the autoclave.

To print barcode labels:

1. Click on the print labels option in the navigation pane.
2. Click on the print labels button.
3. Make sure the right printer is selected.
4. Enter the number of copies to print.
5. Uncheck the “Fit picture to frame” checkbox.
6. Finally, click on the print button.

The desired number of barcode labels would be printed. Apply the printed barcode labels to the packages.

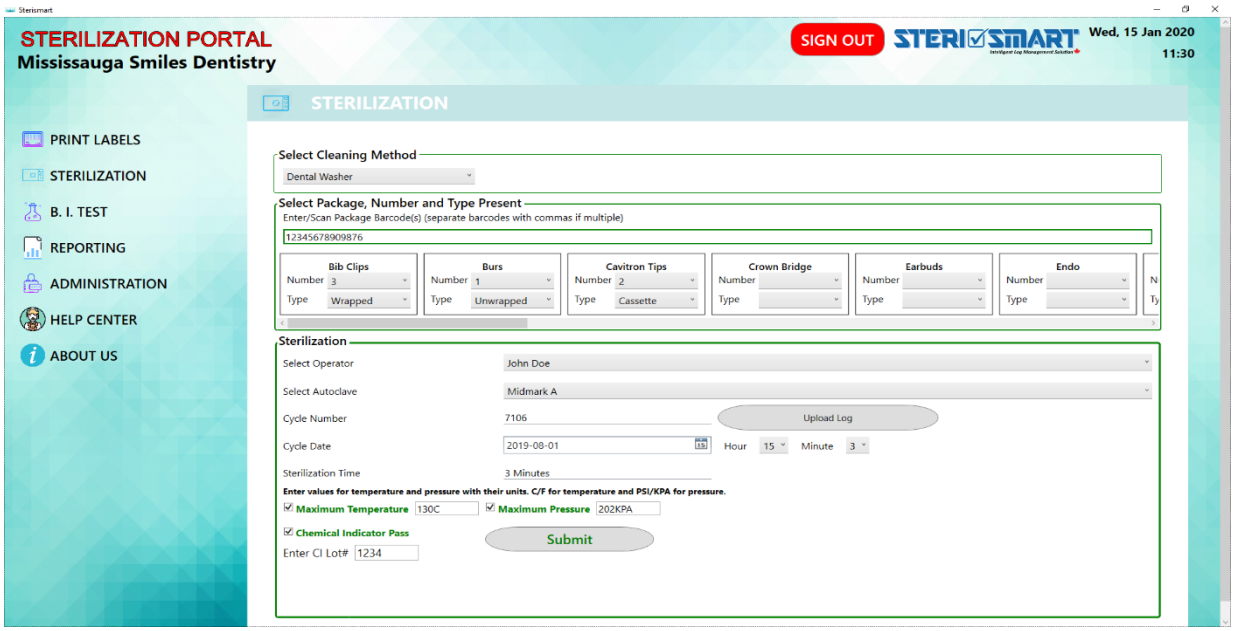
4.2.2 Step 2 – Sterilization

In this step, you report how the instruments were cleaned (options include dental washer, manual, ultrasonic and hydrim). You also report the type of packages (load), the package ID(s), the number of each package present and the type of each package. Next, you input all information on the sterilization cycle (operator, autoclave, cycle number, temperature, pressure, chemical indicator test and lot number)

To enter the sterilization cycle information:

1. Click on the sterilization link on the left navigation pane if the sterilization page isn't already opened.
2. Select the cleaning method by clicking on the dropdown menu and select the method which applied to how the instruments were cleaned.
3. After selecting the cleaning method, enter or scan the package barcode labels. If all the packages have the same label, scan/enter the package ID only once. If you are using pre-printed barcode labels (or if some packages have different barcode/package IDs) scan each different barcode label separating them with a comma (",").
4. Next, select all packages present. Select the number present and the package type.
5. Select the sterilization operator from the dropdown list.
6. Select the Autoclave used in sterilization. If the Log directory of the autoclave has been set and the directory exists, the system would read the most recent log file from the directory and capture the needed information and fill in the required fields.
7. If the log directory of the autoclave wasn't set and the location of the cycle log file is known (if the cycle log file is in a USB or SD card, insert the USB/SD card before you proceed), click the "Upload Log" button to upload the log file. After clicking the button, a dialog opens, navigate to the location where the cycle log file is found. Select the log file and click the open button. The system reads the log file, extracts and fill all the needed information.
8. If the log directory of the autoclave wasn't set and the cycle log file doesn't exist, manually enter the cycle number, cycle date, hour, minute, sterilization time (optional field).
    a. If the maximum temperature for sterilization was reached, check the maximum temperature checkbox and enter the temperature if known (entering the maximum temperature value is optional).
    b. If the maximum pressure for sterilization was reached, check the maximum pressure checkbox and enter the maximum pressure (entering the maximum pressure value is optional).
    c. If the chemical indicator test is pass, check the chemical indicator pass checkbox and enter the chemical indicator lot number.

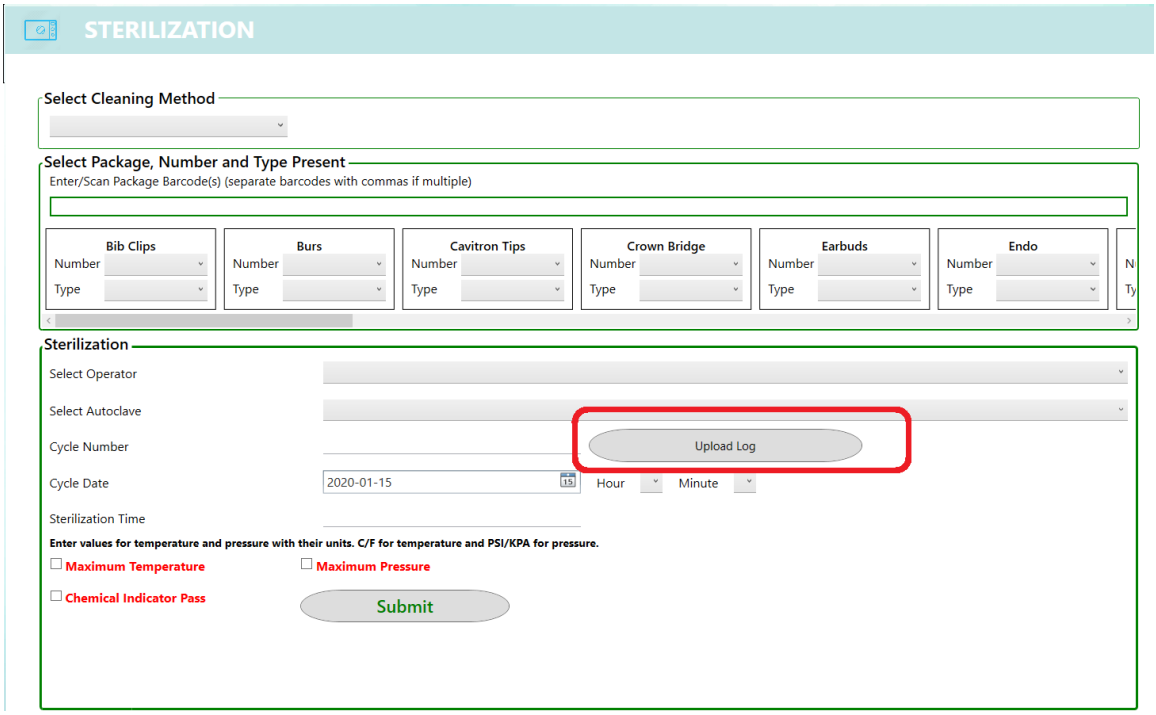
9. Verify that all input data is correct.
10. Click the submit button to finally submit all information.
11. You will receive a notification that data was submitted successfully.



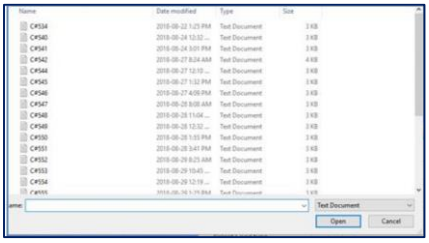
4.2.2.1 Smart Reader Data Logger

If you have a Smart Reader Data Logger, it is easy to upload the data.

1. Once the cycle is complete, please remove the SD card from the Smart Reader
2. Insert the SD card into the PC
3. Open a new sterilization record by clicking the sterilization link in the navigation pane.
4. Click on the Upload Log button.



5. File explorer will open and choose your cycle log file.

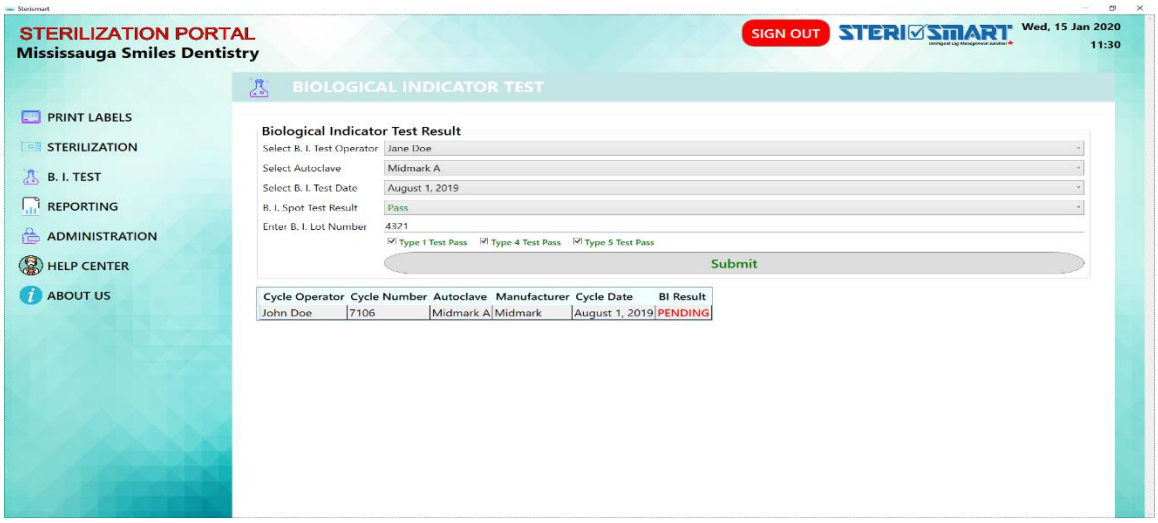


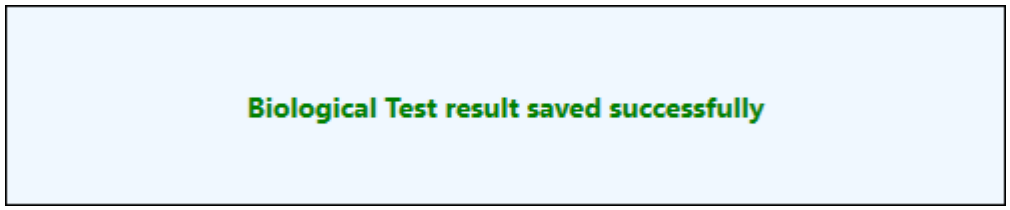
6. Double click the cycle
7. The data will populate the fields. (Cycle number, temperature, pressure, sterilization duration, date and time)
8. Continue with the chemical indicator test data entry

4.2.3 Step 3 – Biological Indicator Test

In this step you input all information on the biological indicator test. To enter the cycle biological indicator test information:

1. Click on the B. I. Test link in the left navigation pane.
2. Select the cycle with pending biological indicator test result.
3. Select the biological indicator test operator from the drop down list.
4. Enter the biological indicator lot number.
5. Check the biological indicator type 1, 4, 5 checkboxes if all test pass. By default, the type 1, 4 and 5 chemical test are all set to pass (green in color). If any of the test fail, check the respective checkbox, it changes color to red.
6. Verify that all data input are correct.
7. Click the submit button to submit the biological indicator test result.
8. You will receive a notification that the biological indicator test result was submitted successfully.



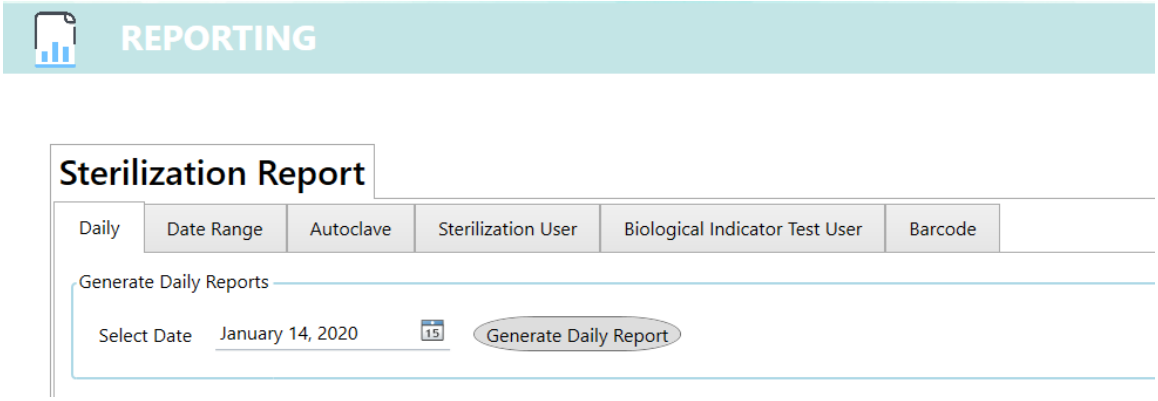


4.2.4 Step 4 – Reports

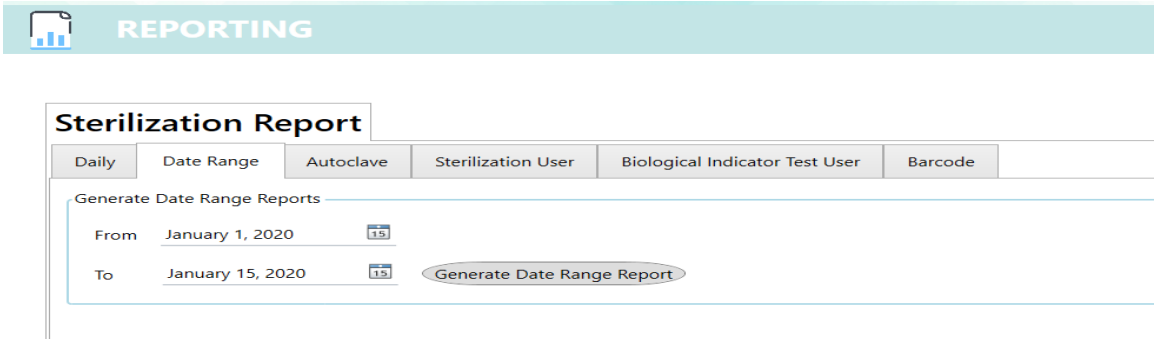
Sterismart creates sterilization reports that are compliant with health regulations and it provides traceability report of sterilization cycle records. The Sterilization Portal will store your results and attach them to the cycle report for the autoclave. You can generate cycle reports daily, by date range, by autoclave, by sterilization user, by biological indicator test user and by package ID (barcode). All reports are formatted to simplify the overview and have names and signatures of operators and managers.

To generate a cycle report:

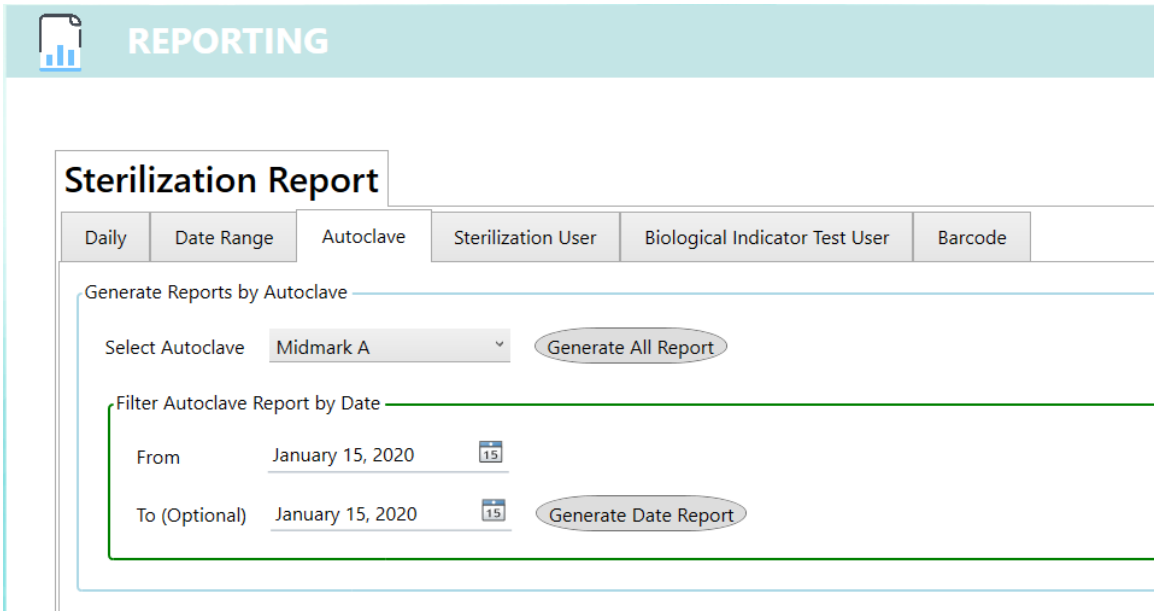
1. Click on the reporting link in the left navigation pane.
2. To generate daily reports:
    a. Click the daily tab under sterilization report.
    b. Select the date you wish to generate the report.
    c. Click the generate daily report button.
    d. Report would be generated if any cycles exists on that particular date.



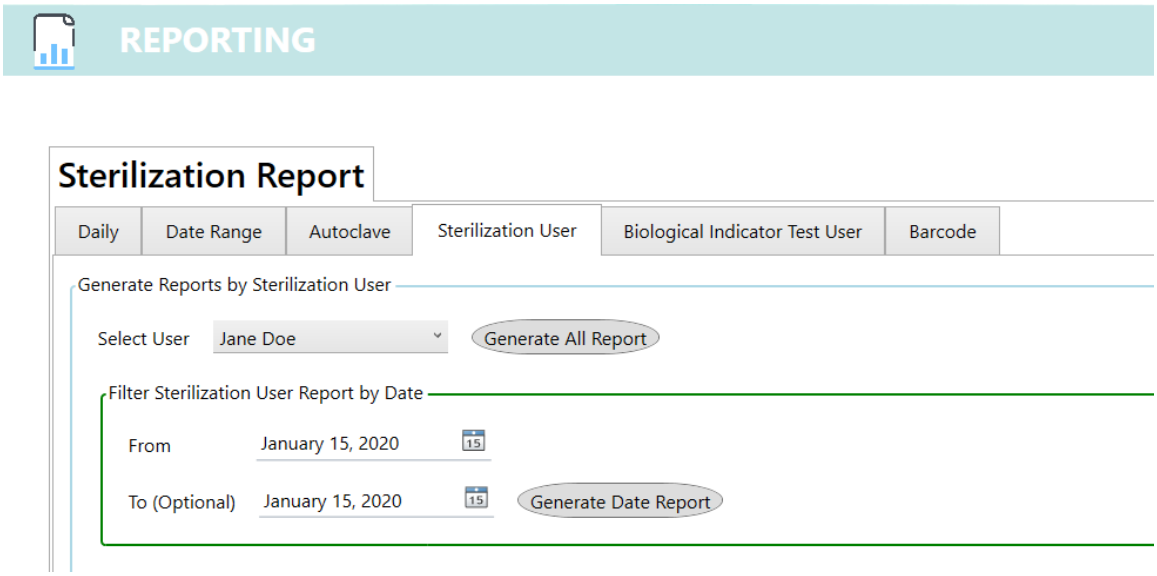
3. To generate reports by date range:
    a. Click the date range tab under the sterilization report.
    b. Select the start (from) date.
    c. Select the end (to) date.
    d. Click the generate date range report button.
    e. Reports would be generated if any cycles exists within the selected dates.



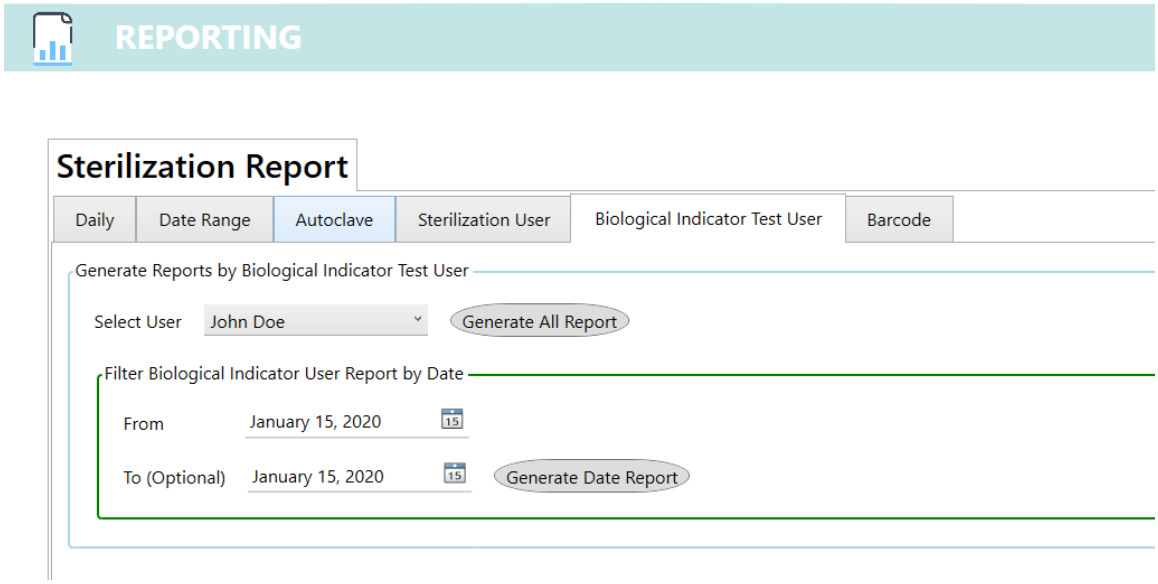
4. To generate reports by autoclave:
    a. Click on the autoclave tab under sterilization report.
    b. Select the autoclave from the dropdown list.
    c. To view all the cycle reports of the selected autoclave, click on the generate all report button.
    d. To view all the cycle reports of the selected autoclave on a particular date, select the desired **from** date and click on the generate date report button.
    e. To view all the cycle reports of the selected autoclave by date range, select the **start** (from) date and the **end** (to) date and click on the generate date report button.



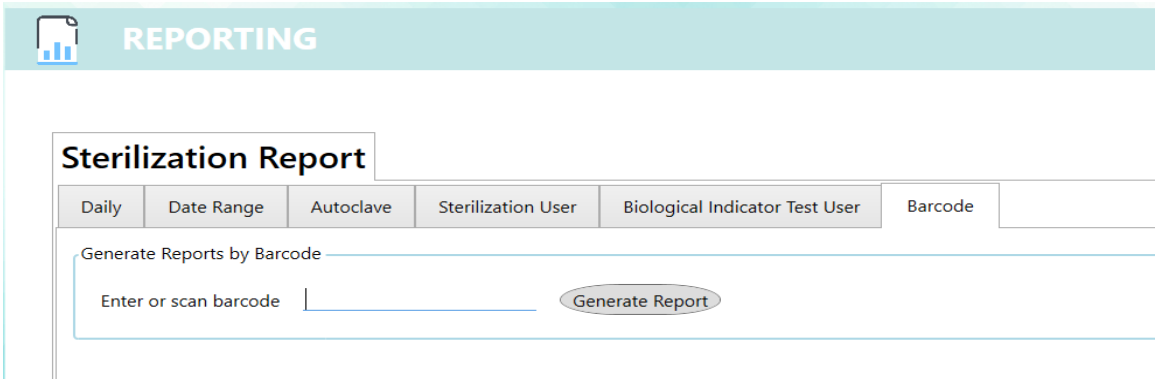
5. To generate reports by sterilization user:
    a. Click on the sterilization user tab under sterilization report.
    b. Select the user from the dropdown list.
    c. To view all reports done by the selected sterilization user, click on the generate all report button.
    d. To view all cycle reports of the selected sterilization user done on a particular date, select the date (from) and click on the generate date report button.
    e. To view all the cycle reports of the selected sterilization user by date range, select the start (from) date and the end (to) date and click on the generate date report button.



6. To generate reports by biological indicator test user:
    a. Click on the biological indicator test user tab under sterilization report.
    b. Select the user from the dropdown list.
    c. To view all reports done by the selected biological indicator test user, click on the generate all report button.
    d. To view all cycle reports of the selected biological indicator test user done on a particular date, select the date (from) and click on the generate date report button.
    e. To view all the cycle reports of the selected biological indicator test user by date range, select the start (from) date and the end (to) date and click on the generate date report button.



7. To generate report by barcode:
    a. Click on the barcode tab under sterilization report.
    b. Enter or scan the barcode ID number.
    c. Click the generate report button.



Generate cycle reports can be stored as a PDF file. To save the generated report:

1. After the sterilization report has been generated, to save the report, click on the save report button.
2. A dialog opens, navigate to the directory where you wish to store the PDF report.
3. Enter the name of the report if you wish to change the default name.
4. After verifying the directory and the name of the PDF file, click on the save button.
5. A PDF report is generated and opened by the default PDF file viewer in the system.
6. To email the report, enter the email(s) in the email box, if multiple emails, separate emails with a comma. After entering all emails, click on the email report button. You will receive a confirmation message that email has been sent.

   Note: All sterilization cycles with a pending biological indicator test are excluded from the results. Meaning only cycles with either a pass or fail biological indicator test are saved in the PDF report.

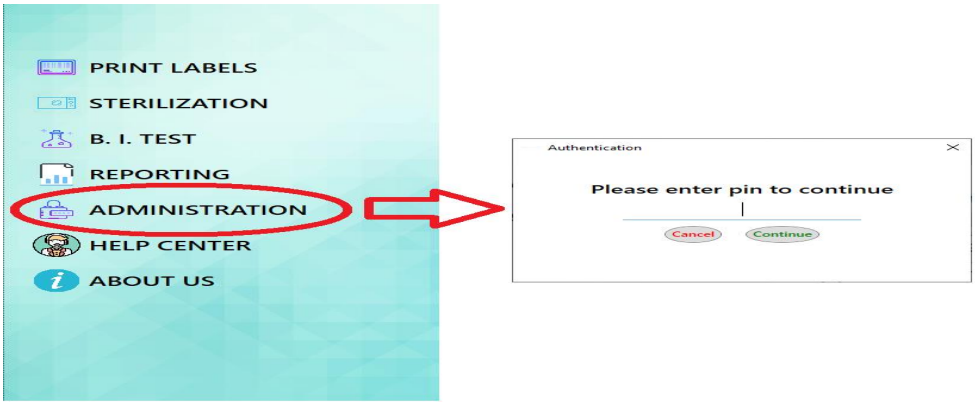
To sign a report as the manager:

1. After generating the report, enter the manager's initials in the box that requests for the manager's initials.
2. Click the save report button and continue as outlined above to save or email the PDF report.

4.2.5 Administration

Administration of the portal. You need to have admin rights to access this option. To change system configuration (i.e to change office information, autoclave, operators, packages and/or backup settings):

a. Click on the Administration link in the navigation pane.
b. A dialog opens requesting you to enter your PIN number.
c. Enter your PIN number and click continue.
d. If admin PIN validation is successful, the user would be directed to the admin portal to add, remove or modify system configuration.



5 Help Center

All information on how to get help, documentation and manuals.

5.1 Help

The telephone for support is (905) 997-7171. The email is support@smartsoftware.ca

5.2 Training

For additional training please contact the office at (905) 997-7171

5.3 FAQ

Here will be all user questions and answers by our technical department in regard to most common questions.

5.3.1 Documentation

All Sterilization information like IPAC info, RCDSO info and Public health information will be available here. MSDS sheets will be added as the database receives email from users.

5.3.2 Manual

The PDF Manual is located in this section.

6 Sign Out

To sign out from the system:

1. Click the red sign out button located at the top right hand side corner of the screen.
2. You will be redirected to the login screen.

7 Appendix

7.1 LICENSE AND SERIAL NUMBER

To use our Sterilization Portal, please use the following information:

Serial Number:

License Number:

Please use this information to register your office in the system.