EMS FIELD BRIDGE

VERSION 5.8

ADMINISTRATOR'S GUIDE

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CHAPTER 1

INTRODUCTION TO FIELD BRIDGE

1.1 Chapter Overview

This chapter will cover basic information about the purpose, structure and technical requirements of the Field Bridge and the roles of individuals given administrative capabilities for the application.

1.2 Overview

The ImageTrend EMS Field Bridge Field Data Application is a Windows-based client application designed to allow remote users to record emergency incident information in the field and synchronize their data with the centralized EMS repository.

With the ImageTrend EMS Field Bridge Field Data Application, you can enter run incident reports, view validation, print patient care reports, send/receive incidents with parent databases, and post runs to regulatory databases right from your desktop, laptop, or Tablet PC.

1.3 System Requirements

In order to run the EMS Bridge Field Data Application, your system must meet these specifications:

Required:	**Recommended:**	**Optimal:**
500 MHz Processor	1 GHz Processor	1.5 GHz Processor
512 MB RAM	2 GB RAM	4 GB RAM
200 MB Available Hard Disk Space	600 MB Available Hard Disk Space	1 GB Available Hard Disk Space
	802.11 wireless	802.11 wireless
		Bluetooth
		GPRS/CDMA cellular modem

Operating Systems Supported
Microsoft Windows XP, XP Tablet PC Edition 2005, Vista, Windows 7

Screen Resolution Supported
1024 x 768

Additional Software
Microsoft .NET Framework 3.5 SP1
Adobe Flash 8 or higher
Adobe Reader 8 or higher

1.4 Installation

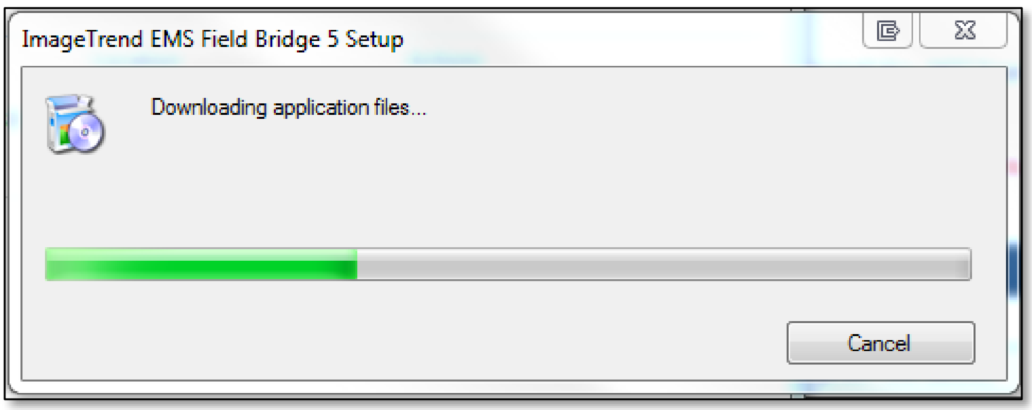
NOTES: In order to protect the sensitive patient information collected with the EMS Field Bridge, ImageTrend recommends creating non-administrative, password protected Windows accounts for field users. All users should be required to log in to the computer before use.

The Field Bridge can be installed on a desktop PC, laptop or Tablet PC, although it is optimized for use with a tablet PC. The handwriting recognition function will not be available for Field Bridge systems installed on a desktop or laptop, and these computers will need to install the e-Signature capability to use electronic signatures.

Downloading the Field Bridge

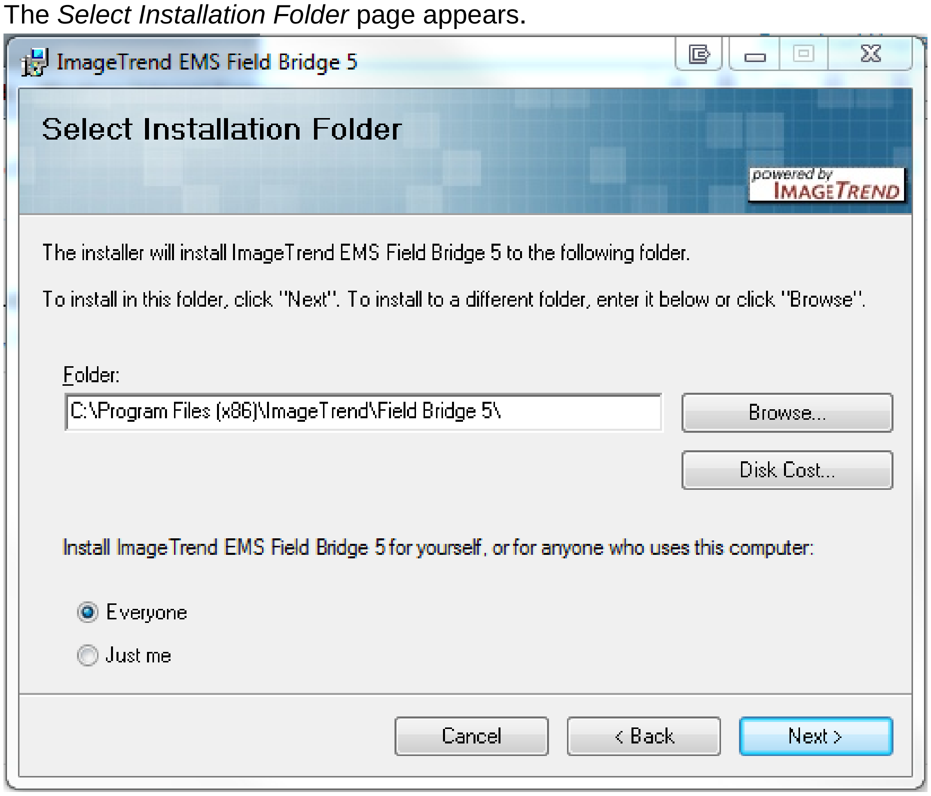
You can download the Field Bridge from the ImageTrend EDS Downloads site. To log in to the site, you will need the username and password provided on your ImageTrend Support Agreement.

1. Navigate to www.imagetrend.com/support/eds-application-downloads
2. Log in using the username and password from your ImageTrend Support Agreement.
   NOTE: This is typically different from the username and password you use to log in to the Service Bridge/State Bridge/Rescue Bridge.
3. From the left menu, under the *EDS Application Downloads* header, click *Field Bridge Version 5 Downloads.*
4. Navigate to the *Field Bridge v5 Full Install* section.
5. Click the *Download* link.
6. Save the download file to a location on your computer that you will be able to find and access again.
7. Run the *FBv5_setup.exe* file.
   The *ImageTrend EMS Field Bridge 5 Setup* dialog box appears, displaying the progress in downloading the setup files.
   NOTE: Depending on the browser that you are using, you may have different options for running this file. Some browsers may bring up a pop up window allowing you to watch the download progress and then run the file, while others will download the file but then require you to navigate to the download location and double-click the file to open it.



When downloading and installation preparation are complete, the Setup Wizard appears.

8. Click *Next.*
   The *Select Installation Folder* page appears.



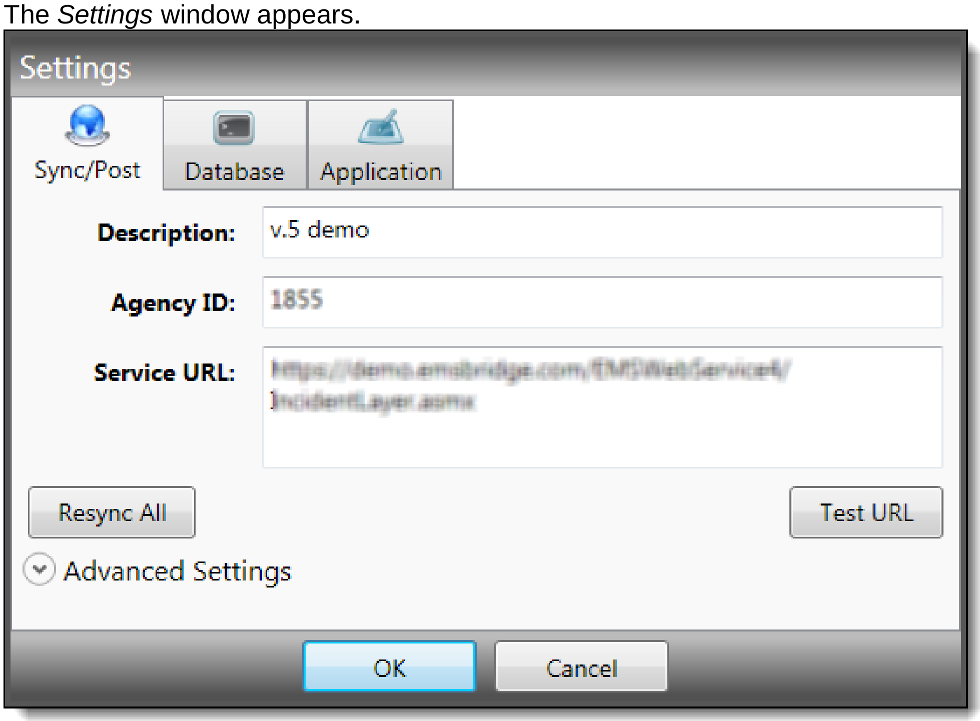
9. Click *Next.*
   The *Confirm Installation* page appears.

10. Click *Next.*
    The Field Bridge begins installing.
    NOTE: This could take some time; please be patient.
11. If needed, agree to any security prompts to continue installation.
12. When installation is complete, from the Setup Wizard dialog box, click *Close.*
    The Field Bridge is installed and ready to be configured.

Setting Up your Field Bridge

After you have installed or opened the Field Bridge, the Field Bridge *Login* screen will appear. You can access the setup options from here.

1. In the upper left corner of the screen, click *Enter Registration Key*.
2. Enter the key found in your Field Bridge Support Agreement.
   When approved, a green checkmark will display.
   NOTE: A staff profile created on the State/Service/Rescue Bridge with a State Certification ID is required to use Field Bridge.
3. From the Field Bridge *Login* screen, click *Settings.*
   The *Settings* window appears.

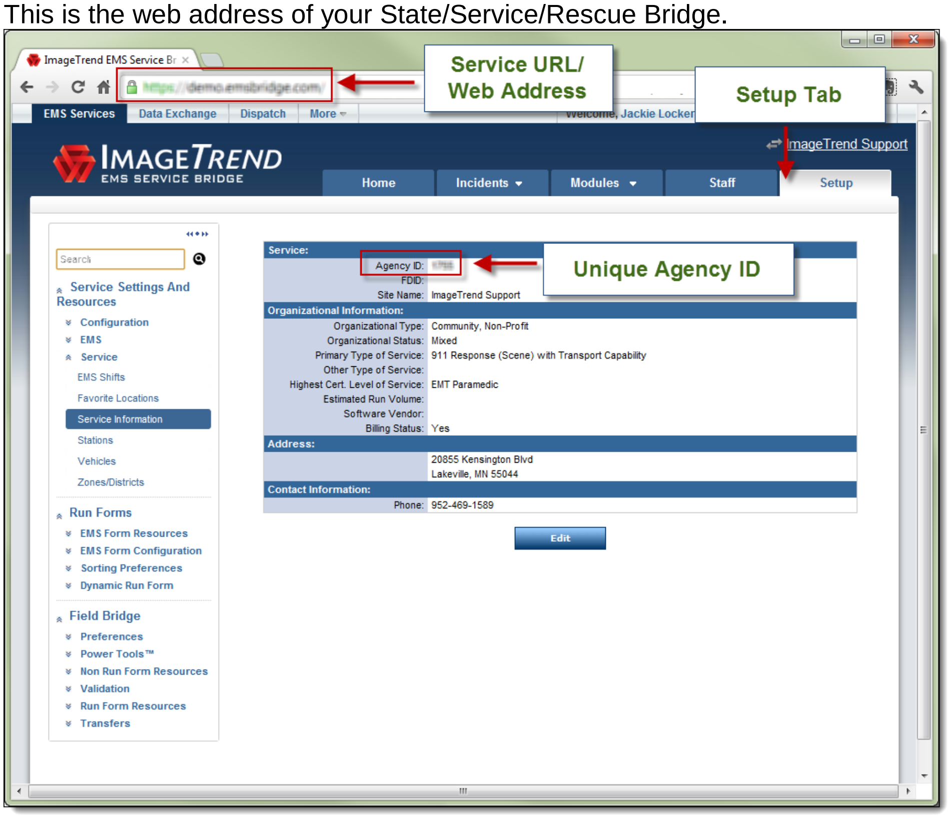


4. Complete all fields to set up your connection with the Web-based system.

   Description
   Enter the agency name here.

   Agency ID
   Your unique ID # is found in the *Setup* tab of the State/Service/Rescue Bridge.

   Service URL
   This is the web address of your State/Service/Rescue Bridge.



5. Click *Test URL*.
6. If the test is successful, click *OK*.
   OR
   If it is not successful, double check your URL, agency id, Internet connection and firewall and repeat step 5.
7. Once successful, click *OK* on the *Settings* page.
   The *Validation Sync Change* dialog box appears.
8. Enter your State/Service/Rescue Bridge username and password.
9. Click *OK.*
   Once the sync is completed, the original login screen will appear.
   NOTE: This pulls all data from your Site/Agency down to Field Bridge. This process may take several minutes.
10. Log in to Field Bridge using your username and password for the State/Service Bridge.

Installing e-Signature capabilities on non-Tablet PCs

Signatures are supported on the ImageTrend EMS Field Bridge on any computers running Windows XP, Vista or Windows XP Tablet PC. In order to access this functionality on a non-

Tablet PC operating system, it is possible to install the Tablet PC Software Development Kit (SDK) 1.7 on the machine. This is a free installation available at http://www.microsoft.com/downloads/details.aspx?familyid=B46D4B83-A821-40BC-AA85-C9EE3D6E9699&displaylang=en. This installation is also available on the EMS Field Bridge Installation CD as well as the EMS Field Bridge support website.

NOTE: Contact the system administrator with questions or for more information about the e-Signature capabilities.

Uninstalling the Application

1. In the Windows Control Panel, go to *Add/Remove Programs.*
2. Select the ImageTrend EMS Field Bridge System.
3. Click *Remove*.
4. Follow the instructions to successfully uninstall the application.
   HINT: These instructions may differ depending on which version of Windows you have installed on the computer.

1.5 Printing Setup

Network Connection

Printing from the EMS Field Bridge System can be performed by connecting the PC running the application (laptop, tablet, etc.) to a physical network resource such as a printer, central server, or LAN connection. The desired printer can be selected from the drop-down menu in the print dialog window.

Infrared Connection

Printing from the EMS Field Bridge System can also be performed without physically connecting your device to a hardware resource. If the PC running the application (laptop, tablet, etc.) is infrared capable as well as the desired printer – simply hold the device within direct view of the printer and follow the instructions for infrared printing found in your PC or printer manual.

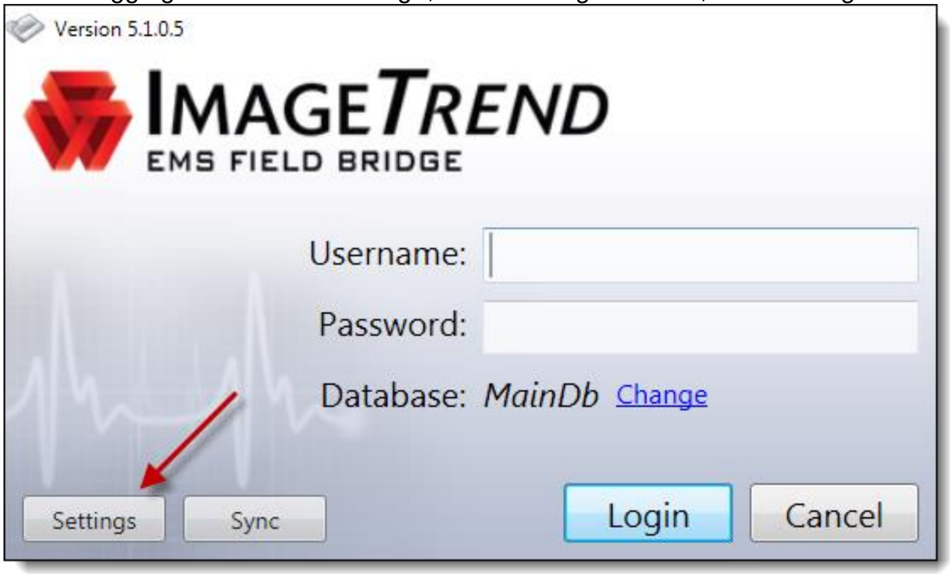
Bluetooth Connection

Printing from the EMS Field Bridge System can also be performed without physically connecting your device to a hardware resource. If the PC running the application (laptop, tablet, etc.) is Bluetooth enabled, a Blue Tooth paired device printer can receive the file and print it out — simply maintain the device within range of the printer and follow the instructions for Bluetooth printing found in your PC or printer manual.

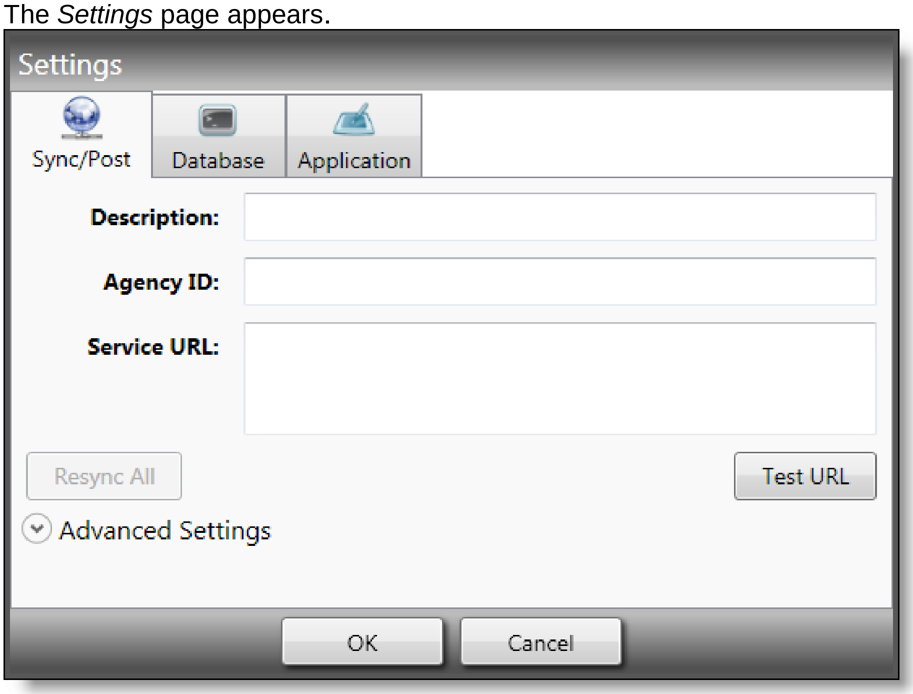
1.6 Setting Up Posting Preferences

Before logging in, administrators can set up posting preferences to determine which Service Bridge and which agency this Field Bridge will sync to.

1. Before logging in to the Field Bridge, from the *Login* screen, click *Settings.*

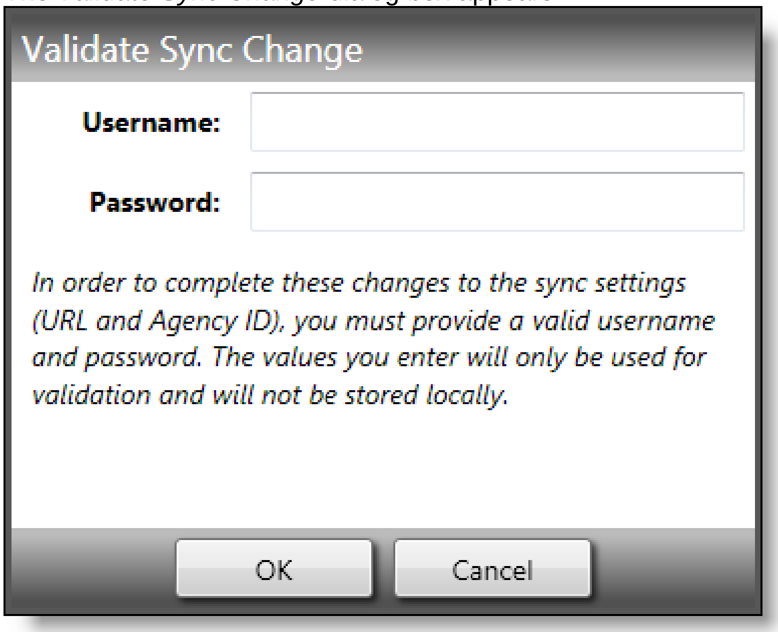


The *Settings* page appears.



2. In the *Description* text box, type a name for this site.
   HINT: This is for your own reference and will not affect the performance of this sync.
3. In the *Agency ID* text box, type the agency ID for the service you want to sync to.
   HINT: You can find the agency ID on the Service Bridge in the *Service Setup* section by viewing the service information.
4. In the *Service URL* text box, type the URL of the Service Bridge to which you will be syncing.
5. **OPTIONAL:** To make sure the URL that was entered is a valid Service Bridge, click *Test URL.*

6. When finished, click *OK.*
   The *Validate Sync Change* dialog box appears.



7. In the *Username* and *Password* text boxes, type a username and password that is available from this agency and Service Bridge.
8. When finished, click *OK.*
   The posting and sync preferences are set up.

1.7 Working with Multiple Field Bridge Databases

If you use a single computer and Field Bridge system to report to multiple services, you will also need to work with multiple databases. Each service that has runs sent to it must have its own database.

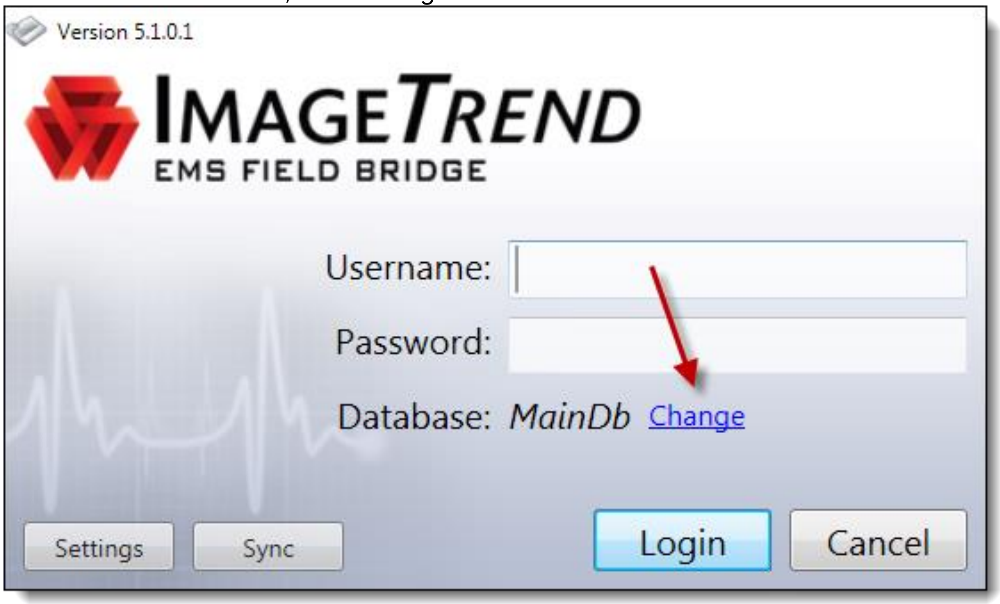
Before you can use multiple databases, you must set up each database that is needed. After that, each time a user logs in, he or she must ensure that the correct service and database is selected, according to where the runs need to be submitted.

Setting Up Databases

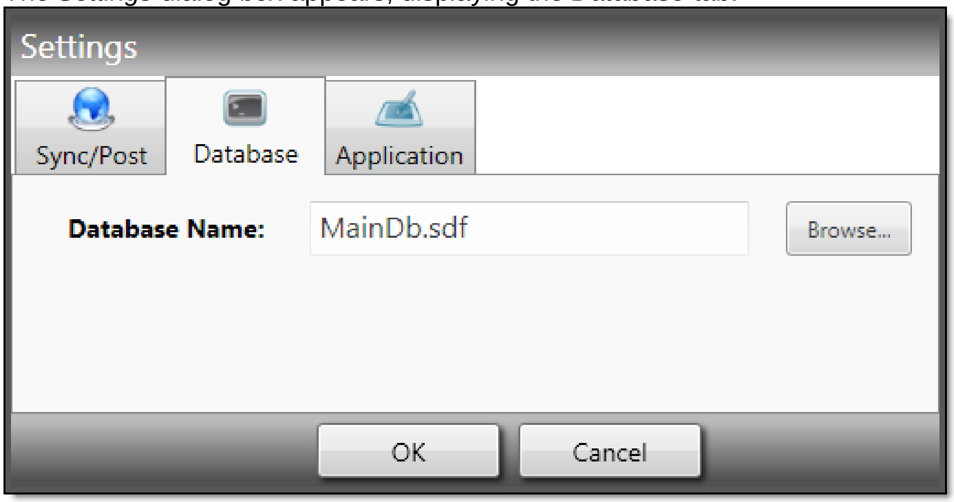
When you are setting up a database for each service that this computer and Field Bridge will be submitting to, you will copy the original database. This ensures that the structure is correct. You can then rename each database to make it easier to know where each database will be submitted.

1. Open the Field Bridge.
   HINT: Do not log in. These changes are made from the *Login* screen.

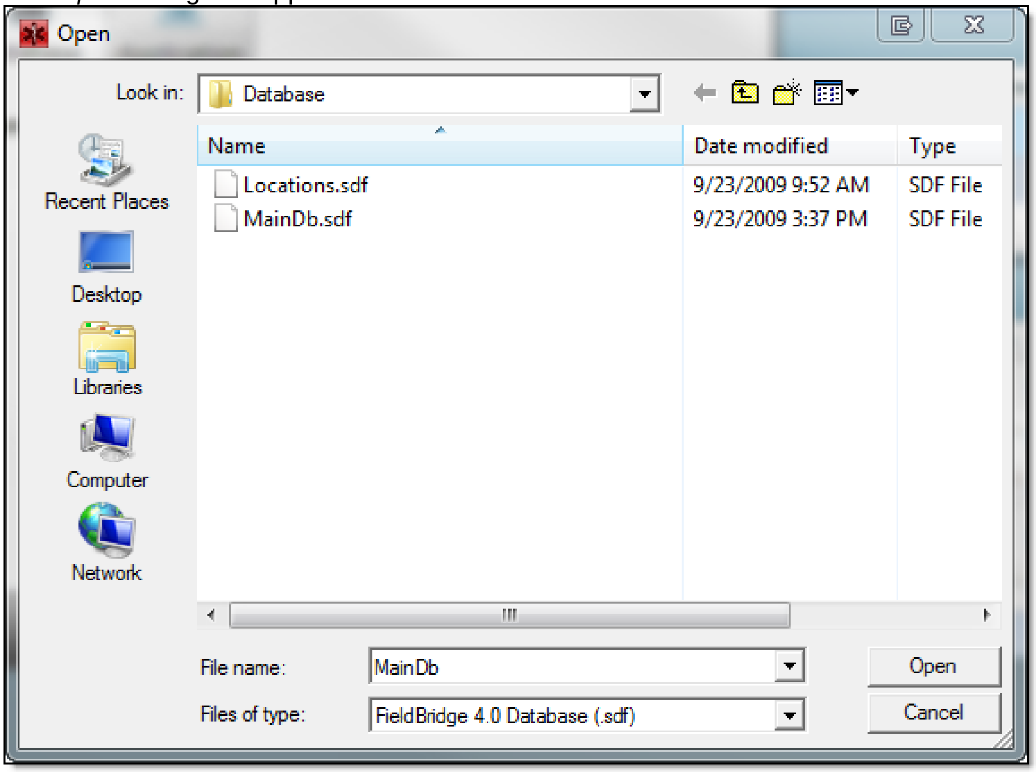
2. In the *Database* section, click *Change.*



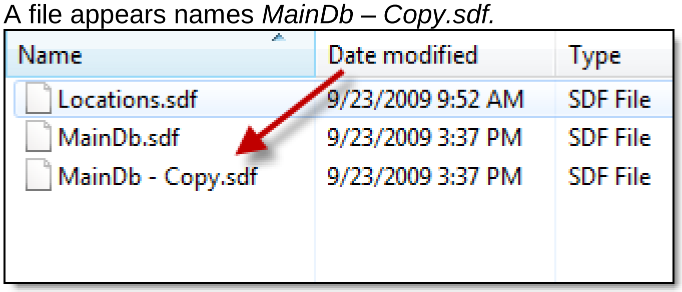
The *Settings* dialog box appears, displaying the *Database* tab.



3. Click *Browse…*
   The *Open* dialog box appears.

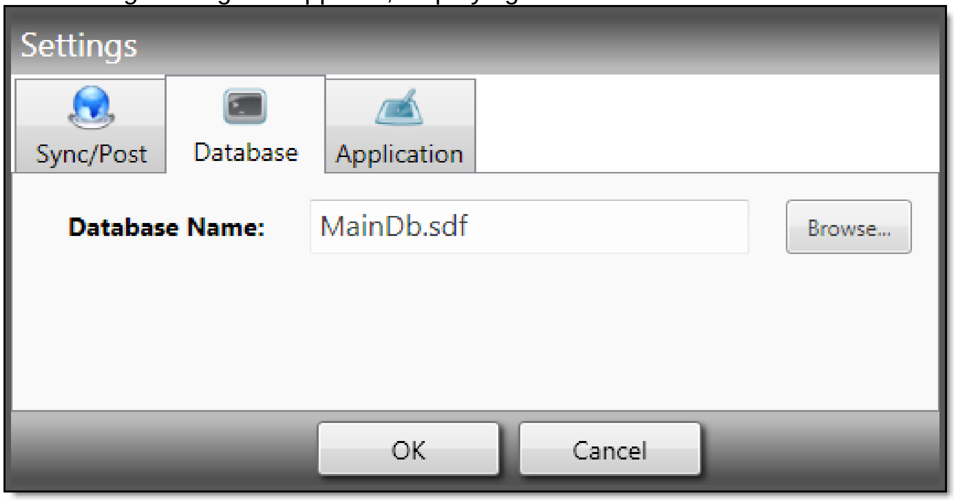


4. Right click the *MainDb.sdf* file and select *Copy.*
5. Right click within the blank portion of the window and select *Paste.*
   A file appears names *MainDb – Copy.sdf.*



6. Right click the new file and select *Rename.*
   The filename of the database becomes editable.
7. Type a new name for the database.
   HINT: It may be easiest to name the database for the service to which it will submit, to make it easy for users to know which database they need to select.
8. Press the *Enter* key.
9. Repeat steps 4–8 until all desired databases are added.
10. To rename the original database,
    a. Select a new database.
    b. Click *Open.*
       You are returned to the *Login* screen.

c. In the *Database* section, click *Change.*
The *Settings* dialog box appears, displaying the *Database* tab.



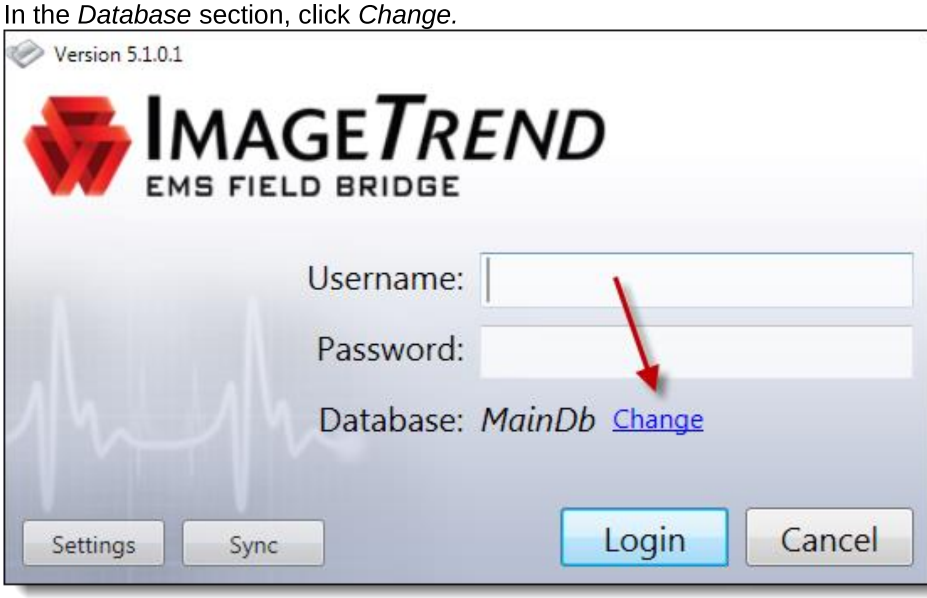
d. Click *Browse…*
The *Open* dialog box appears.
e. Right click the *MainDb.sdf* file and select *Rename.*
f. Type the desired name for the database.
g. Press the *Enter* key.

11. Select the database you currently want to use.
12. Click *Open.*
The database(s) are set up.

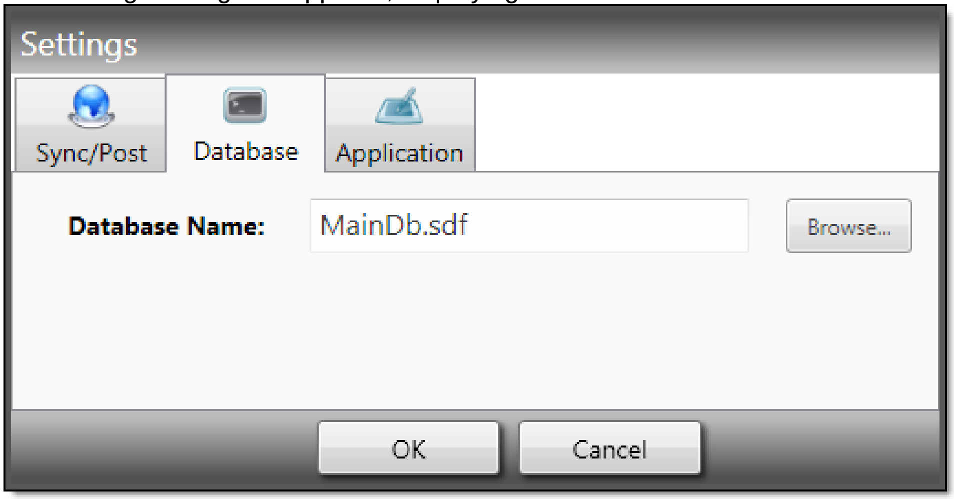
Switching Databases

Once all databases are set up, users can switch the database they are saving runs to each time they log in. Users should ensure that the correct service and database is selected each time they log in, to avoid sending runs to the wrong service.

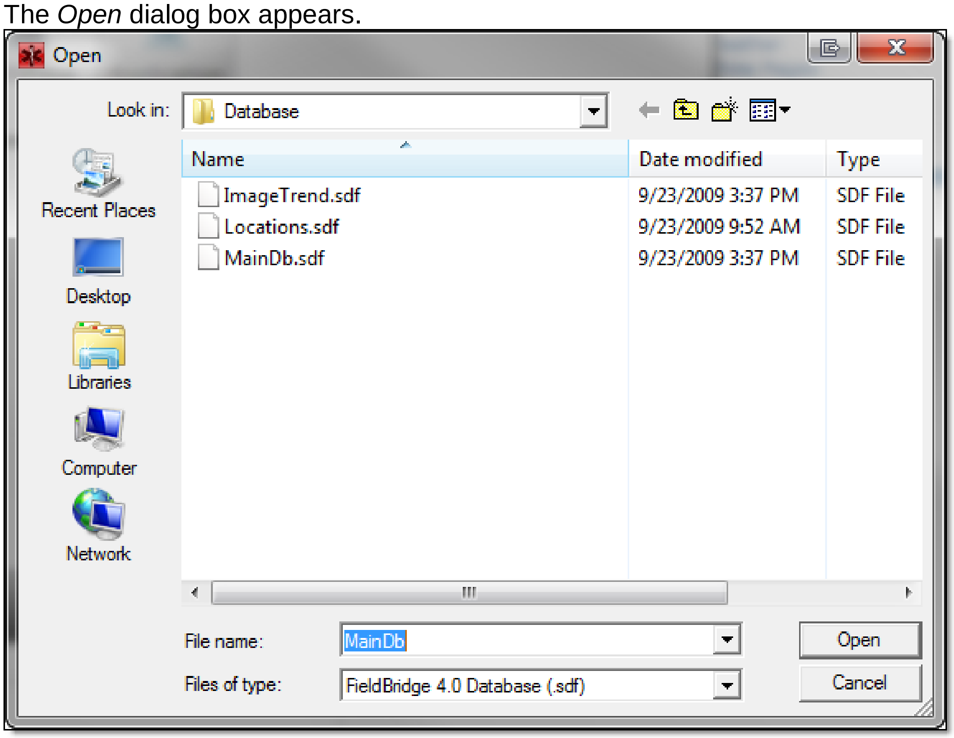
1. Open the Field Bridge.
HINT: Do not log in. These changes are made from the *Login* screen.
2. In the *Database* section, click *Change.*



The *Settings* dialog box appears, displaying the *Database* tab.

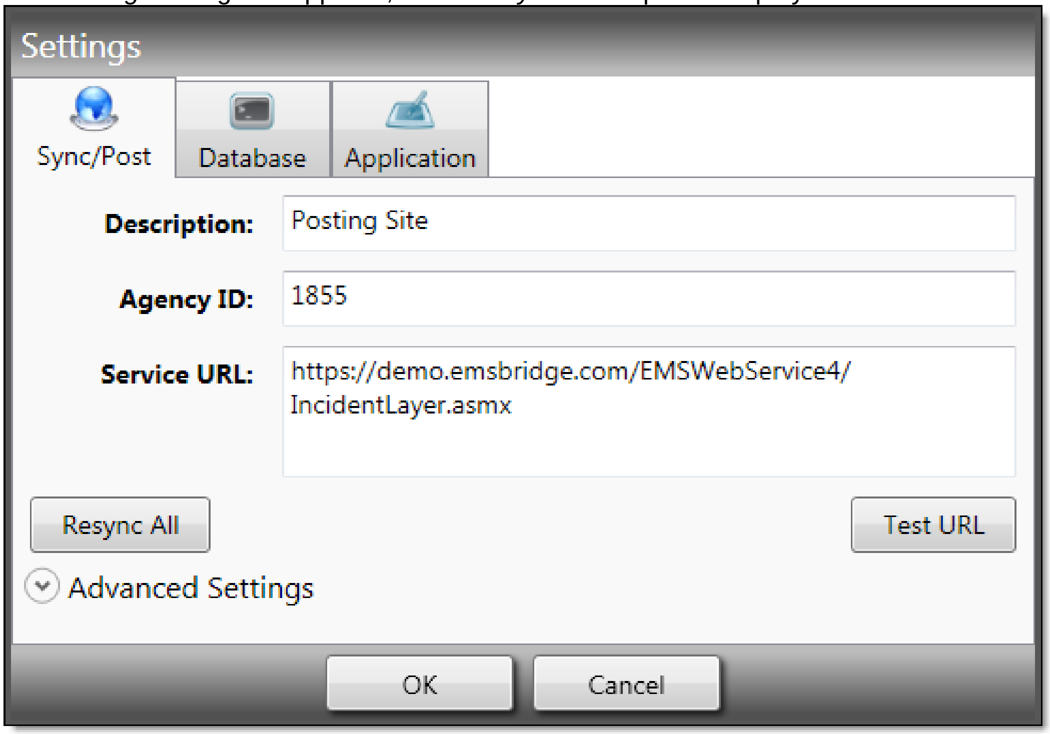


3. Click *Browse…*
The *Open* dialog box appears.



4. Select the desired database.
5. Click *Open.*

6. From the *Login* screen, click *Settings.*
   The *Settings* dialog box appears, with the *Sync/Post* options displayed.



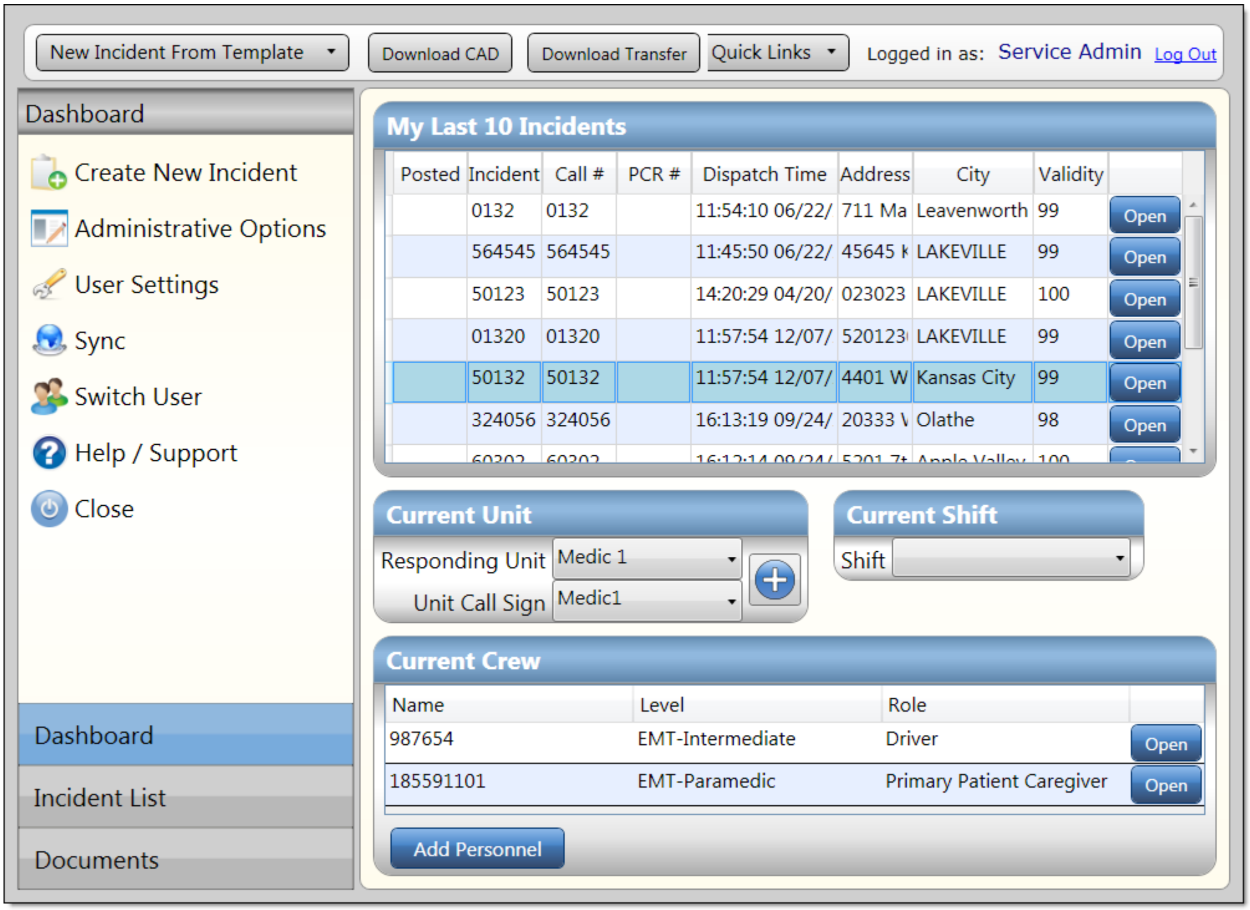
7. In the *Agency ID* text box and the *Service URL* text box, change the agency ID and/or the URL for the Web-based system, as appropriate.
   HINT: If you are posting to a different service, you will need to change the agency ID. You will only need to change the service URL if you are posting to a service with a different Service Bridge or State Bridge.
8. Click *OK.*
9. If prompted, enter a username and password to confirm your use of the new service.
   The new service is selected; you can now log in and safely record and post runs to the service.

1.8 The Field Bridge Environment

The Field Bridge system allows users to enter data for run reports and administrators to configure reporting and data collection options, set service and staff information and upload documents and other resources for staff members to access.

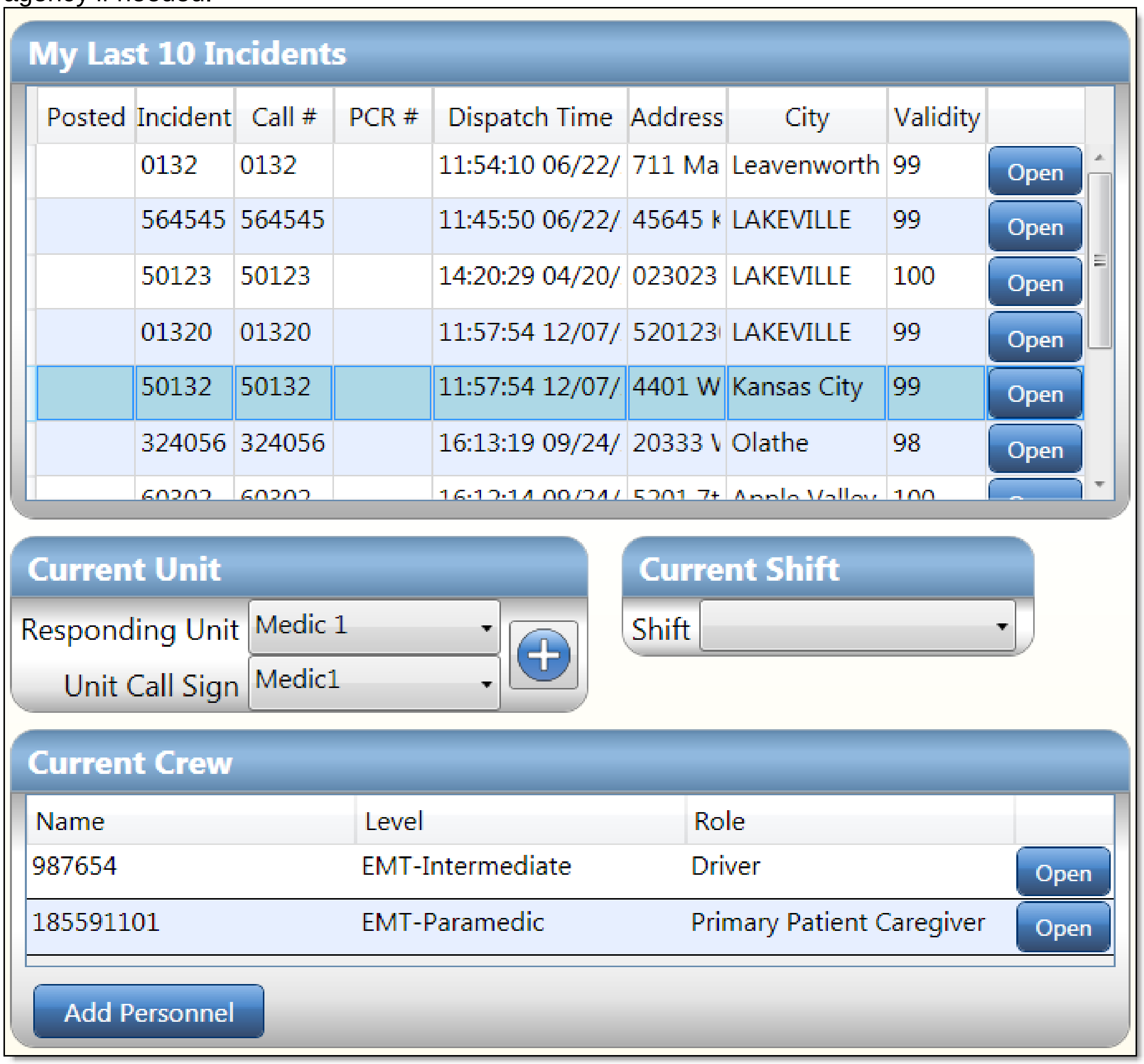
NOTE: Many of the setup and administrative options for the Field Bridge are available only through the Service Bridge, State Bridge or Rescue Bridge, including staff setup, run form editing and uploading documents.

Upon logging in, users will see the Dashboard, which provides a shortcut to common tasks and information and to the last ten incidents that have been saved. Crew members will view the last ten runs in which they were involved, while administrators will view the last ten runs that have been saved on the Field Bridge. All tasks within the Field Bridge can be accessed from this window, from beginning a new run report to posting past runs.


New Incident From Template
Download CAD
Download Transfer
Quick Links
Logged in as: Service Admin Log Out
Dashboard
Create New Incident
Administrative Options
User Settings
Sync
Switch User
Help / Support
Close
Dashboard
Incident List
Documents
My Last 10 Incidents
Posted Incident Call # PCR # Dispatch Time Address City Validity
0132 0132 11:54:10 06/22/ 711 Ma Leavenworth 99 Open
564545 564545 11:45:50 06/22/ LAKEVILLE 99 Open
50123 50123 14:20:29 04/20/ 023023 LAKEVILLE 100 Open
01320 01320 11:57:54 12/07/ LAKEVILLE 99 Open
50132 50132 11:57:54 12/07/ 4401 W Kansas City 99 Open
324056 324056 16:13:19 09/24/ Olathe 98 Open
Current Unit
Responding Unit Medic 1
Unit Call Sign Medic1
Current Shift
Shift
Current Crew
Name Level Role
987654 EMT-Intermediate Driver Open
185591101 EMT-Paramedic Primary Patient Caregiver Open
Add Personnel

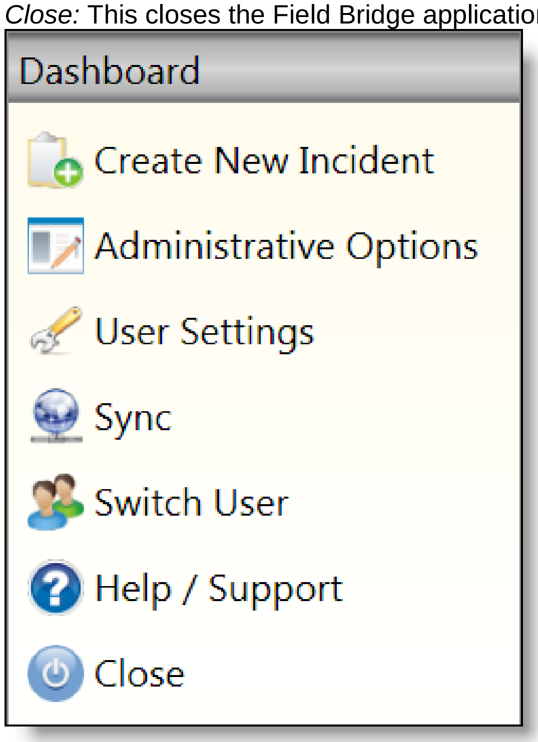
The Dashboard Options

The main section of the Dashboard page allows you to work with the last ten incidents that have been saved using this Field Bridge, as well as the current personnel and vehicle. The *Current Unit, Current Shift* and *Current Crew* widgets can be turned off for Field Bridge systems in your agency if needed.

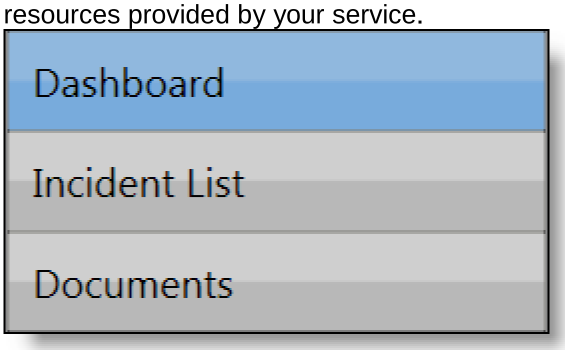


The Dashboard Menu
The left menu on the Dashboard page provides access to additional settings.

- *Create New Incident:* This opens a new incident report from the default template.
- *Administrative Options*: This allows you to set options about how the Field Bridge will work for all users of this Field Bridge, including auto call numbers, even tracking and automatic run form saving.
- *User Settings:* This allows you to set certain options about how your run forms will work within Field Bridge. These settings will be different for every user who logs in to Field Bridge.
- *Sync:* This connects you to your Service Bridge, State Bridge or Rescue Bridge to download any updates (from new staff members to setting changes).
- *Switch User:* This logs the current user out of the Field Bridge and allows a new user to sign in.
- *Help/Support:* This brings you to a summary of Field Bridge information, allows you to check the error log or check for application updates, go to the support website or open the documents that come with the Field Bridge.
- *Close:* This closes the Field Bridge application.

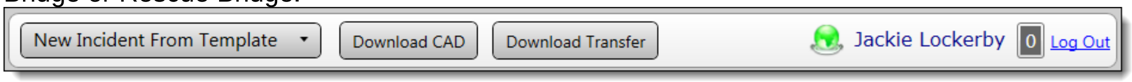


The Task Pane
The task pane provides access to the Dashboard, the incident list and any documents or resources provided by your service.



Toolbar

The toolbar across the top of the page provides access to additional run form templates, the opportunity to download runs that have been transferred from another Field Bridge system (with an Internet connection) and runs that have been sent from a CAD system (if your service has integrated the Field Bridge with CAD). Additionally, an icon to the left of your name indicates whether you currently have Internet connectivity, and the number to the right of your name displays the number of unread Inbox messages you have available in the Service Bridge, State Bridge or Rescue Bridge.



System Integration

The EMS Field Bridge can be integrated with ImageTrend's Service Bridge, Rescue Bridge or State Bridge for full functionality. The Service Bridge, State Bridge and Rescue Bridge allow administrators to configure the Field Bridge, provide a place for data to be gathered and analyzed and enhance the abilities of the Field Bridge to collect relevant data. Data collected in the Field Bridge will be uploaded to a Service Bridge, Rescue Bridge or State Bridge.

Throughout this manual, references will be made to setup in the Service Bridge, State Bridge or Rescue Bridge. The instructions and actions referenced can be performed in the same way no matter which of the Web-based systems your Field Bridge is set up to work with.

1.9 Administration and Permissions

Administrative users have the ability to change the setup of the Field Bridge, allowing the application to be configured to fit each service's needs. Each service may have customized administrative roles, so not all administrators may be able to complete all functions or even see all features detailed in the manual. If an administrator needs more information or more access to the system, they should contact a superior administrator.

CHAPTER 2

SERVICE AND STAFF SETUP

2.1 Chapter Overview

Service and staff information must be set up in the Service Bridge and synced to the Field Bridge. This chapter explains how to set up service information and how to set up staff members for the Field Bridge using the Service Bridge.

2.2 Editing Basic Service Information

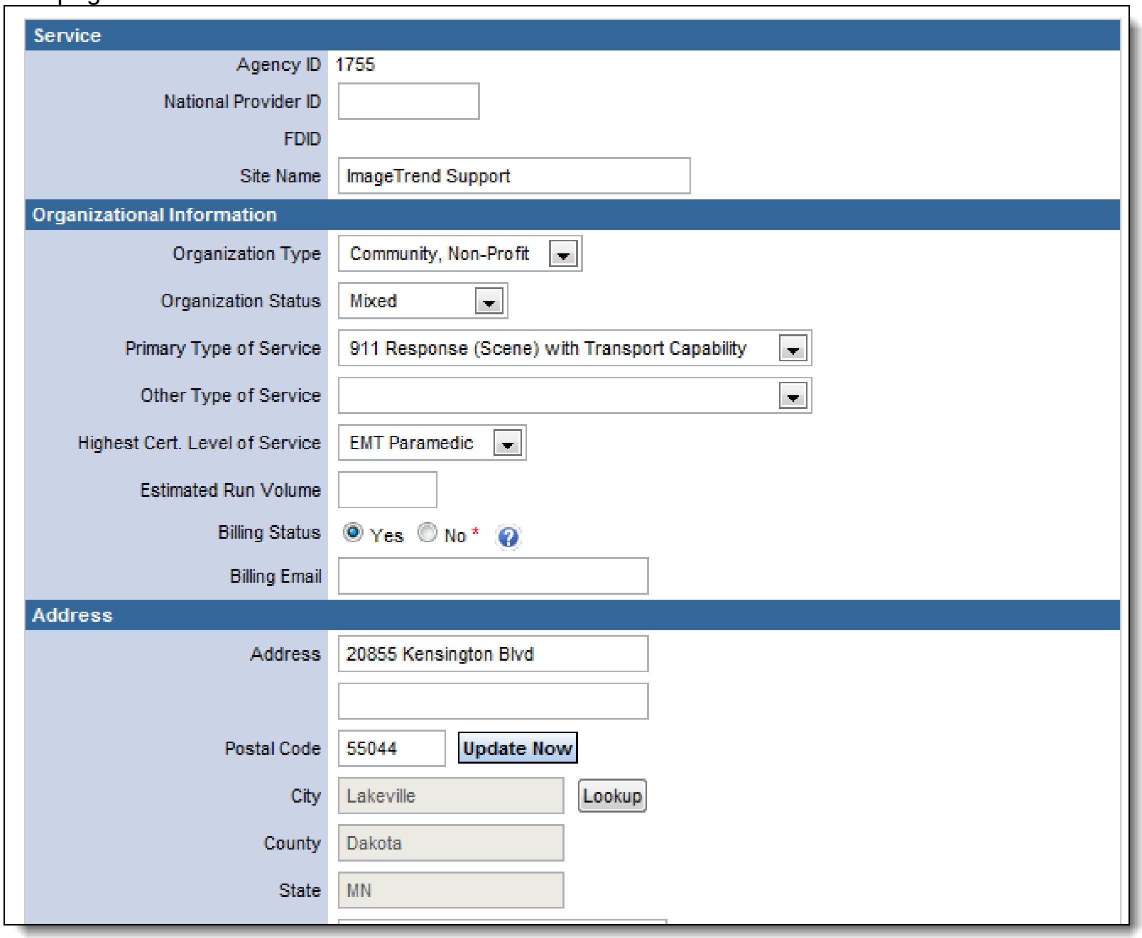
Service information is used to provide contact and identification information to any persons who may have access to the Field Bridge or Service Bridge/State Bridge/Rescue Bridge or who receive exported data from the system. This information will be transferred down to the Field Bridge, and the agency ID listed in the service information will determine which service your Field Bridge syncs to.

NOTE: This information must all be set up on the Service Bridge/State Bridge/Rescue Bridge.

1. From the top left, click *My Service.*
   NOTE: If you are working with a Rescue Bridge, you may have a *My Fire Department* link instead of a *My Service* link.
2. Select the *Setup* tab*.*
3. Under the *Service Settings and Resources* section, select *Service.*
   A sub-menu appears.
4. Under *Service,* select *Service Information.*

The *View Service Info* page appears, displaying basic information about the service.

5. From the bottom of the page, click *Edit.*
   The page becomes editable.



6. Using the provided fields, change or enter any information about the service.
7. When finished, to save the information, click *OK*.
   To return to the service information without making the changes, click *Cancel.*

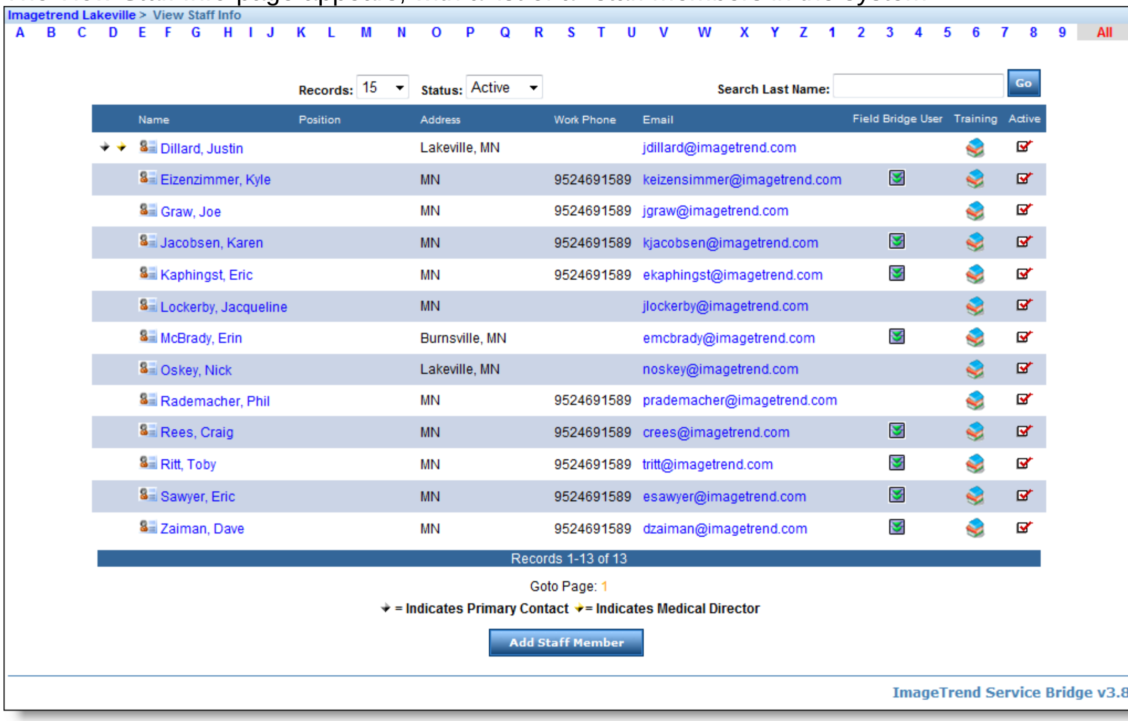
2.3 Staff Profile Information

Staff profiles contain a variety of information about the staff member. This information can be used to automatically fill out run forms; keep track of the staff member's history, certifications and issued equipment; administer their access to the Field Bridge and Service Bridge/State Bridge/Rescue Bridge and store contact and demographic information. Staff profiles also give staff members a username and password to sign in to the Field Bridge. This information is organized into tabs in the editable profile. Each staff member of a service who has access to the Field Bridge or who may be included on a run form should have a profile created in the system.

Basic staff profiles include information about the staff member's certifications, role and associations within the service and contact information. The main page listing all user profiles will display basic information about each record. Icons will appear to indicate whether this user is synchronized to a Field Bridge, as well as to open any training records for the staff member.

1. From the top left, click *My Service.*
   NOTE: If you are working with a Rescue Bridge, you may have a *My Fire Department* link instead of a *My Service* link.

2. Select the *Staff* tab.
The *View Staff Info* page appears, with a list of all staff members in the system.



Imagetrend Lakeville > View Staff Info

A B C D E F G H I J K L M N O P Q R S T U V W X Y Z 1 2 3 4 5 6 7 8 9 All

Records: 15 Status: Active Search Last Name: Go

Name	Position	Address	Work Phone	Email	Field Bridge User	Training	Active
Dillard, Justin		Lakeville, MN		jdillard@imagetrend.com			
Eizenzimmer, Kyle		MN	9524691589	keizensimmer@imagetrend.com			
Graw, Joe		MN	9524691589	jgraw@imagetrend.com			
Jacobsen, Karen		MN	9524691589	kjacobsen@imagetrend.com			
Kaphingst, Eric		MN	9524691589	ekaphingst@imagetrend.com			
Lockerby, Jacqueline		MN		jlockerby@imagetrend.com			
McBrady, Erin		Burnsville, MN		emcbrady@imagetrend.com			
Oskey, Nick		Lakeville, MN		noskey@imagetrend.com			
Rademacher, Phil		MN	9524691589	prademacher@imagetrend.com			
Rees, Craig		MN	9524691589	crees@imagetrend.com			
Ritt, Toby		MN	9524691589	tritt@imagetrend.com			
Sawyer, Eric		MN	9524691589	esawyer@imagetrend.com			
Zaiman, Dave		MN	9524691589	dzaiman@imagetrend.com			

Records 1-13 of 13

Goto Page: 1

= Indicates Primary Contact = Indicates Medical Director

Add Staff Member

ImageTrend Service Bridge v3.8

3. To sort the listed applicants by particular criteria, use the filter drop down menus to select the desired criteria.
4. To display a different number of records per page, from the *Records* drop down menu, select the desired number of records.
5. To search for a particular staff member, in the *Search Last Name* text box, type the last name or part of the last name for the desired staff member and click *Go.*
6. From the list of staff profiles, click the name of the desired staff member.
7. To return to the list of staff members at any point, click the *Back to Staff List* button.
8. After filtering, to view all staff members again, click *All.*
9. To view a particular staff member's profile, click the hyperlinked name.
10. To return to the list of staff members at any point, click the *Back to Staff List* button.
11. **OPTIONAL:** To edit the staff member's profile,
    a) Below the profile information, click *Edit.*
    b) Click a tab to work with the fields in that tab.
    c) Using the provided fields, change or add any desired information.
    d) To save any changes, click *OK.*
    To return to the staff profile without saving changes, click *Cancel.*

Required Field Bridge User Information

While it is best to complete all information in a staff profile for a complete record, the following information <u>must</u> be completed in order for a profile to sync to the Field Bridge.

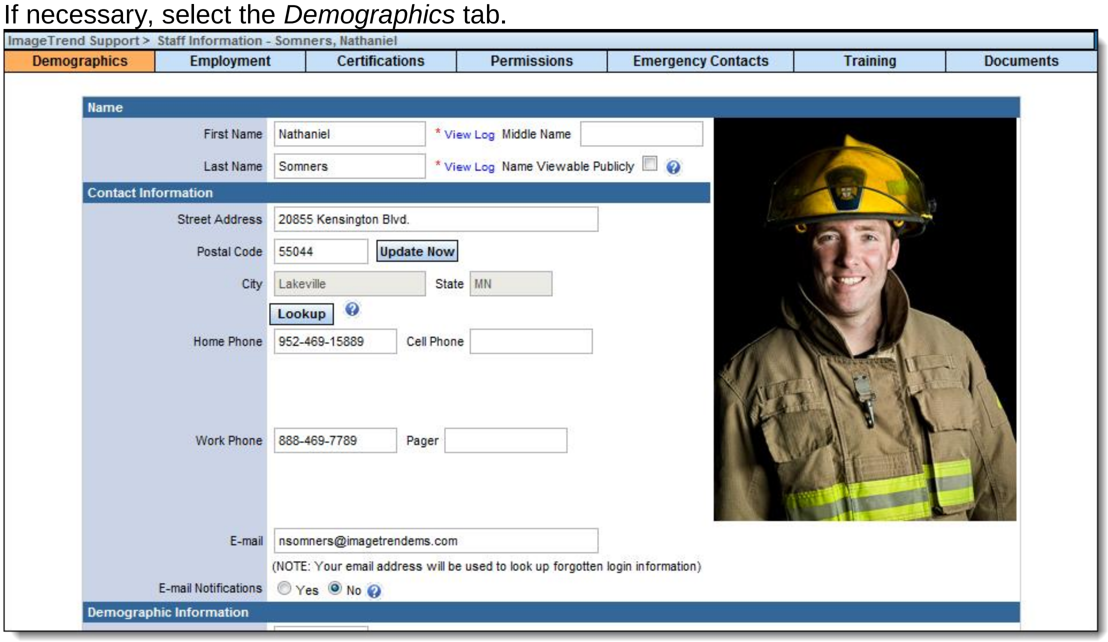
- First and last name (*Demographics* tab)
- Email address (*Demographics* tab)
- State certification number (*Certifications* tab)
- User ID and password (*Permissions* tab)
- Service Bridge/State Bridge/Rescue Bridge permission group (*Permissions* tab)
- *Active* and *Unlocked* account status (*Permissions* tab)
- Any desired Field Bridge permissions for specific tasks (*Permissions* tab)
- *Synchronize Staff Record* selection (*Permissions* tab)

The Demographics Tab

The *Demographics* tab determines the name that will appear in this user's profile and for all other system functions working with this user, stores contact and personal information and allows users and administrators to upload photographs of the staff member.

To change or add this information:

1. From the staff member's profile, click *Edit.*
2. If necessary, select the *Demographics* tab.

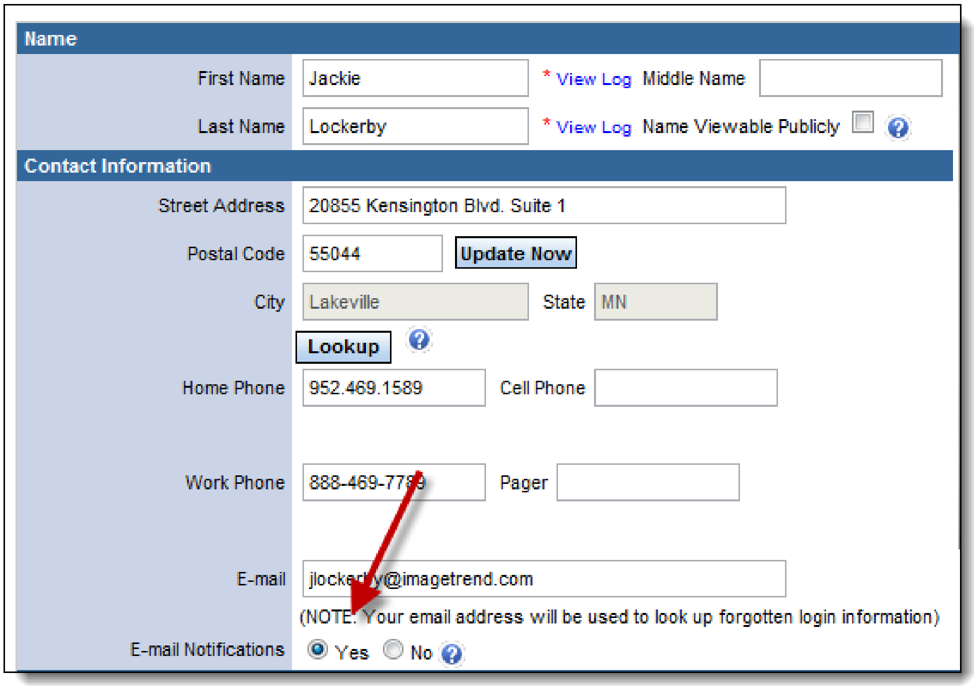


3. From the *Demographics* tab, use the provided fields to enter or change any information.
   NOTE: The driver's license number and social security number available on this page will be available only to that staff member and the service administrator(s).

Signing Up for ImageTrend Email Notifications

ImageTrend periodically sends out email notifications regarding our products, including information about scheduled downtime due to maintenance or upcoming upgrades to the Rescue Bridge. If you want to be included on these notifications or want a specific staff member to be included, you can add someone to the email list through the *Demographics* tab of a staff profile.

1. Open the *Demographics* tab of the staff profile.
2. In the *Email Notifications* section, select *Yes*.



The selected staff member will be added to the email list with the email addresses record in the staff profile.

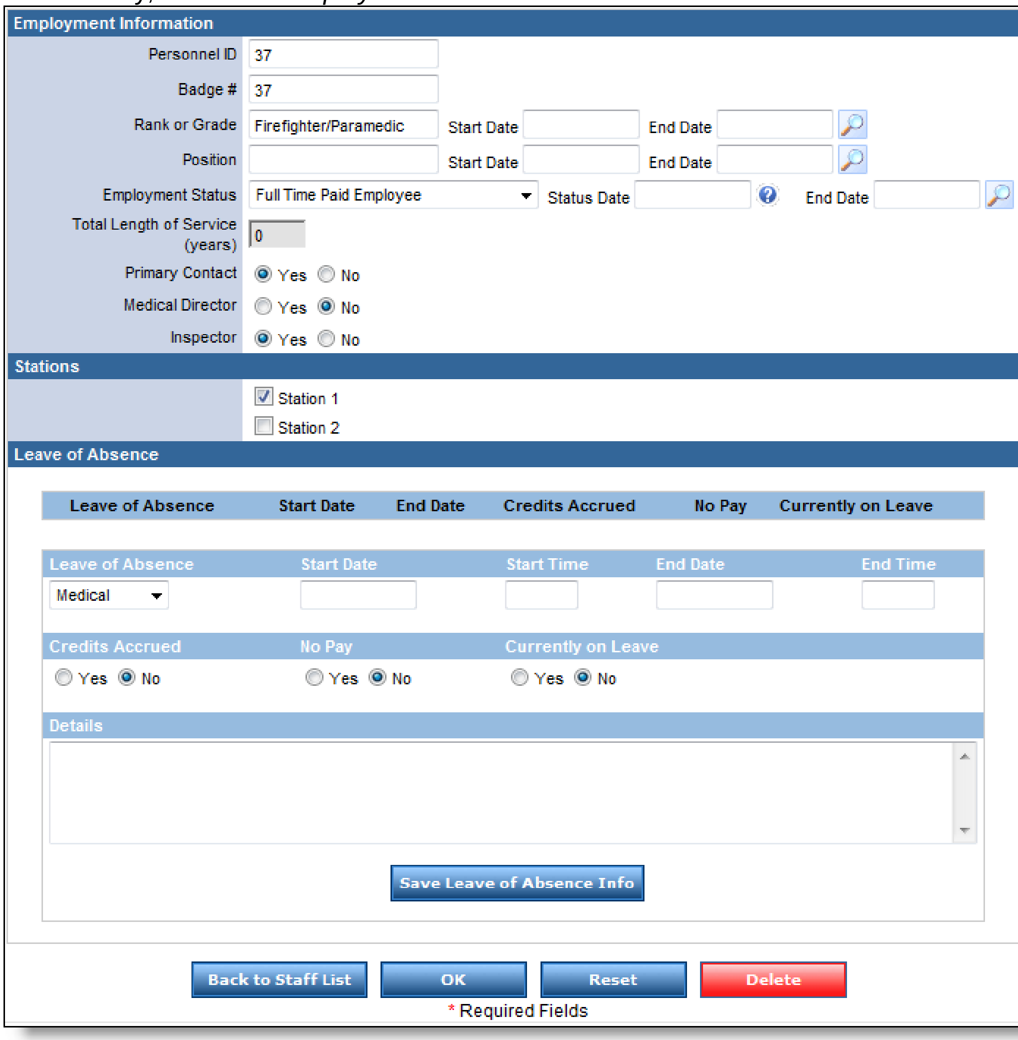
The Employment Tab

The *Employment* tab keeps track of the user's history with the service, including their position and status, length of service, ID numbers and any leaves of absence that have been taken. The staff member can also be assigned to a particular station in this tab, and roles such as primary contact, medical director or inspector can be assigned to the profile.

To add or change this information:

1. From the staff member's profile, click *Edit.*

2. If necessary, select the *Employment* tab.



3. In the *Employment Information* section, enter information about the staff member's status at the service.

   NOTE: To view the user's employment history, click the *Lookup History* icons for each field.

4. In the *Stations* section, select all stations with which the profile should be associated.

   HINT: The user will be able to access information designated to all stations to which they are assigned, and will be available in all lists of staff by station for those selected stations.

5. In the *Leave of Absence* section, enter all information to be documented for a leave of absence for this staff member and click *Save Leave of Absence Info*.

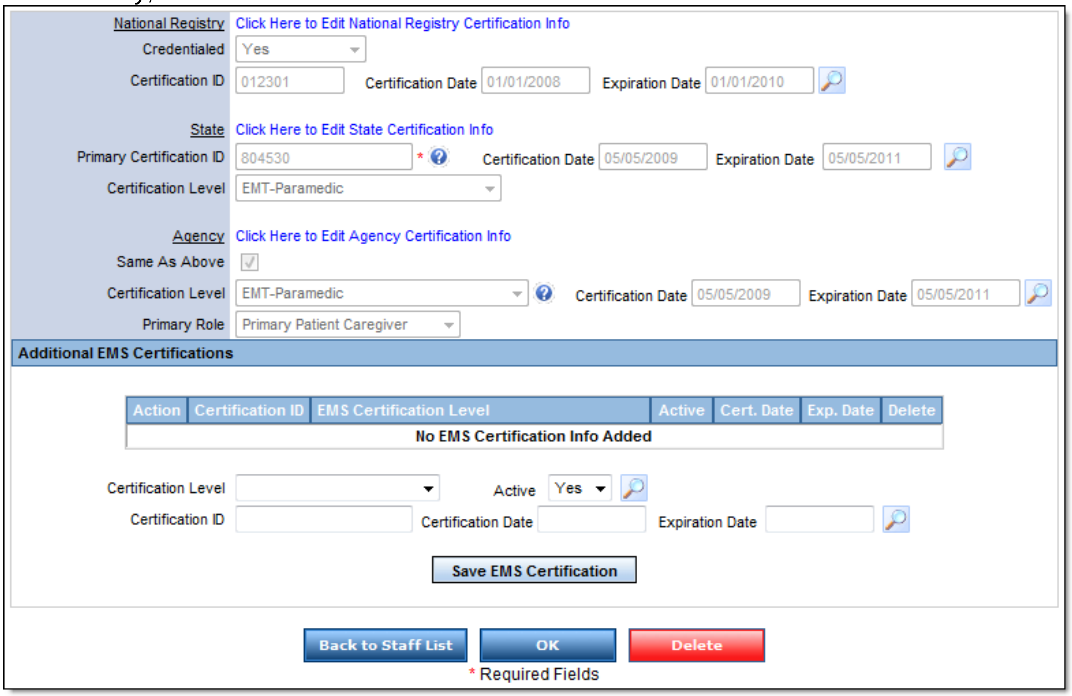
The Certifications Tab

The *Certifications* tab keeps track of staff members' certifications and their respective dates.

NOTE: In order for this user to be synced to the Field Bridge and to be available as a provider on run forms, a state certification ID must be provided.

1. From the staff member's profile, click *Edit.*

2. If necessary, click the *Certifications* tab.



3. To edit or add information about a national certification, state certification or agency-specific certification,
    a. In the desired section, click *Click Here to Edit (Type) Registry Certification Info.*
    b. Using the provided fields, enter or change any desired information.

       NOTE: State certification ID information must be entered in order for this user to be available as a provider on run forms.
4. To add an additional EMS certification,
    a. In the *Additional EMS Certifications* section, from the *Certification Level* drop down menu, select the certification to record.
    b. From the *Active* drop down menu, select whether this staff member currently has this certification.

       HINT: If you are recording a certification in the past, even if this staff member has renewed the certification, the past certification will be inactive. When you create a record for the current certification, that record will be active.
    c. In the *Certification ID* text box, type the certification ID number.
    d. In the *Certification Date* section, type the data that the certification was received.
    e. In the *Expiration Date* section, type the date that the certification will expire.
    f. When finished, click *Save EMS Certification.*
5. Repeat step 4 until all desired certifications are added.
6. When finished, to save the changes, click *OK.*

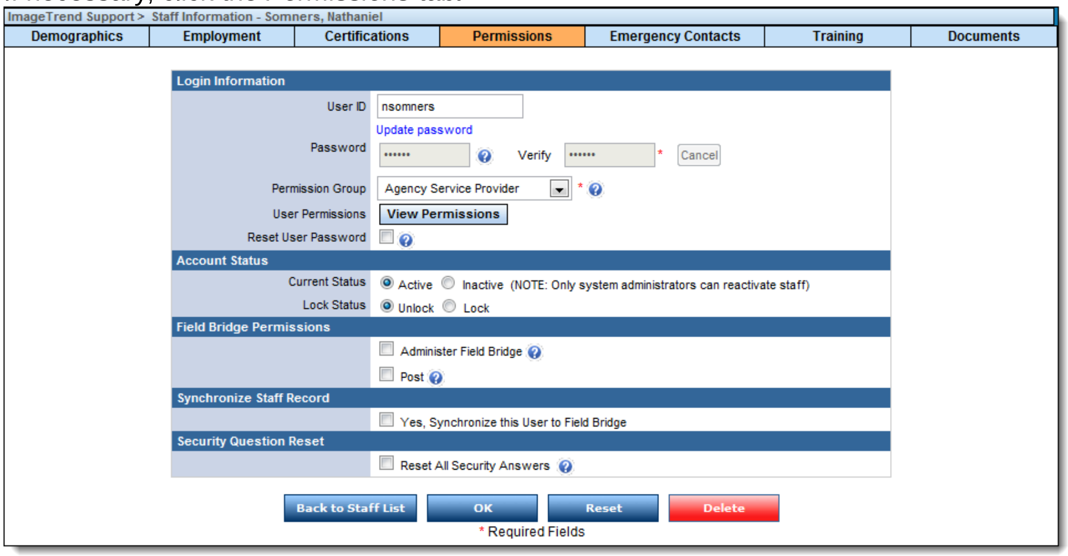
The Permissions Tab

The *Permissions* tab controls the user's access to the Field Bridge system and the Service Bridge system. This includes the user's username and password, account status and access rights to the Field Bridge, Service Bridge permission group and individual access rights,.

To work with this information:

1. From the staff member's profile, click *Edit.*

2. If necessary, click the *Permissions* tab.



3. To change the username or password, in the corresponding text boxes, make the desired change.

   NOTES:
   If the user's password is changed by anyone other than the user him- or herself, the user will be prompted to change the password after logging in.
   If a user's password is changed, he or she will need to sync before being able to log in to the Field Bridge. When a password is requested for the sync, the user's new password should be used.

   HINT: To force a user to change their password, select the *Reset User Password* checkbox. This option will not be available if users are not required to change their password periodically as set up in the *Administration* tab under *Account Management* an each permission group. For more information, please refer to the *Working with Permission Groups* section.
4. To change the user's permission group, from the *Permission Group* drop down menu, select the correct group.
5. To activate or deactivate the account, in the *Current Status* section, select the desired option.

   HINT: This should be used for staff members who are no longer part of your service; staff members should not be deleted from the system. Only administrators will be able to re-activate a staff member.
6. To set this user's level of access to particular Field Bridge features, in the *Field Bridge Permissions* section, select and deselect the desired options.

   HINT: Selecting a checkbox allows the user to access that function. Deselecting the checkbox prevents access.

Administer Field Bridge
Gives this user access to the *Administrative Options* button and dialog box in the Field Bridge.

Post
Determines whether the user can send run reports from the Field Bridge to the Service Bridge.

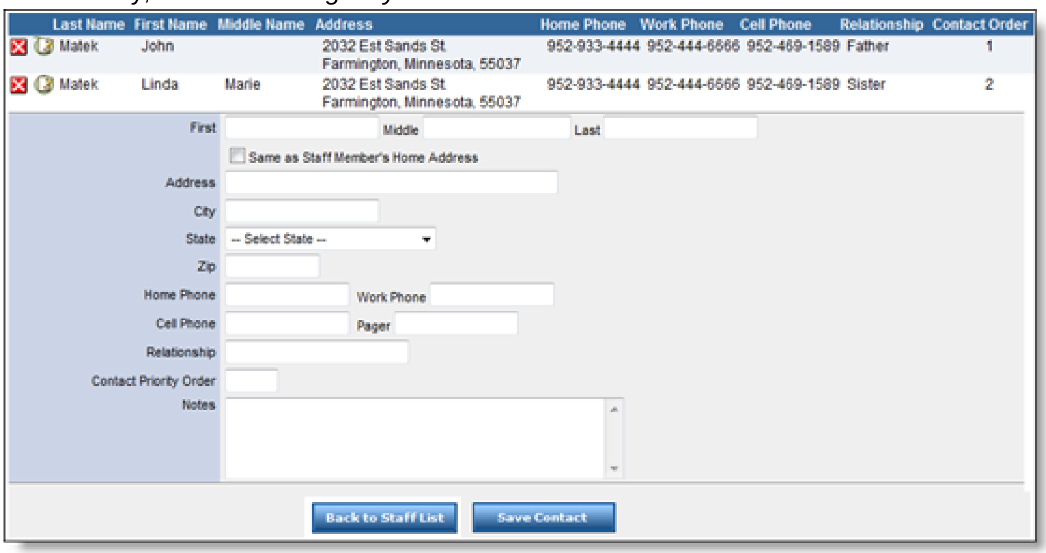
7. To make this user a Field Bridge user in addition to a Service Bridge/State Bridge/Rescue Bridge user, select the *Yes, Synchronize this User to Field Bridge* checkbox.
8. When finished, to save the changes, click *OK.*

The Emergency Contacts Tab

The *Emergency Contacts* tab keeps contact information for persons who need to be informed in the event of an emergency involving the employee.

To work with information for contacts:

1. From the staff member's profile, click *Edit.*
2. If necessary, click the *Emergency Contacts* tab.



3. To edit a contact's information or view additional notes, click the *Edit* icon and make any changes in the updated text boxes below.

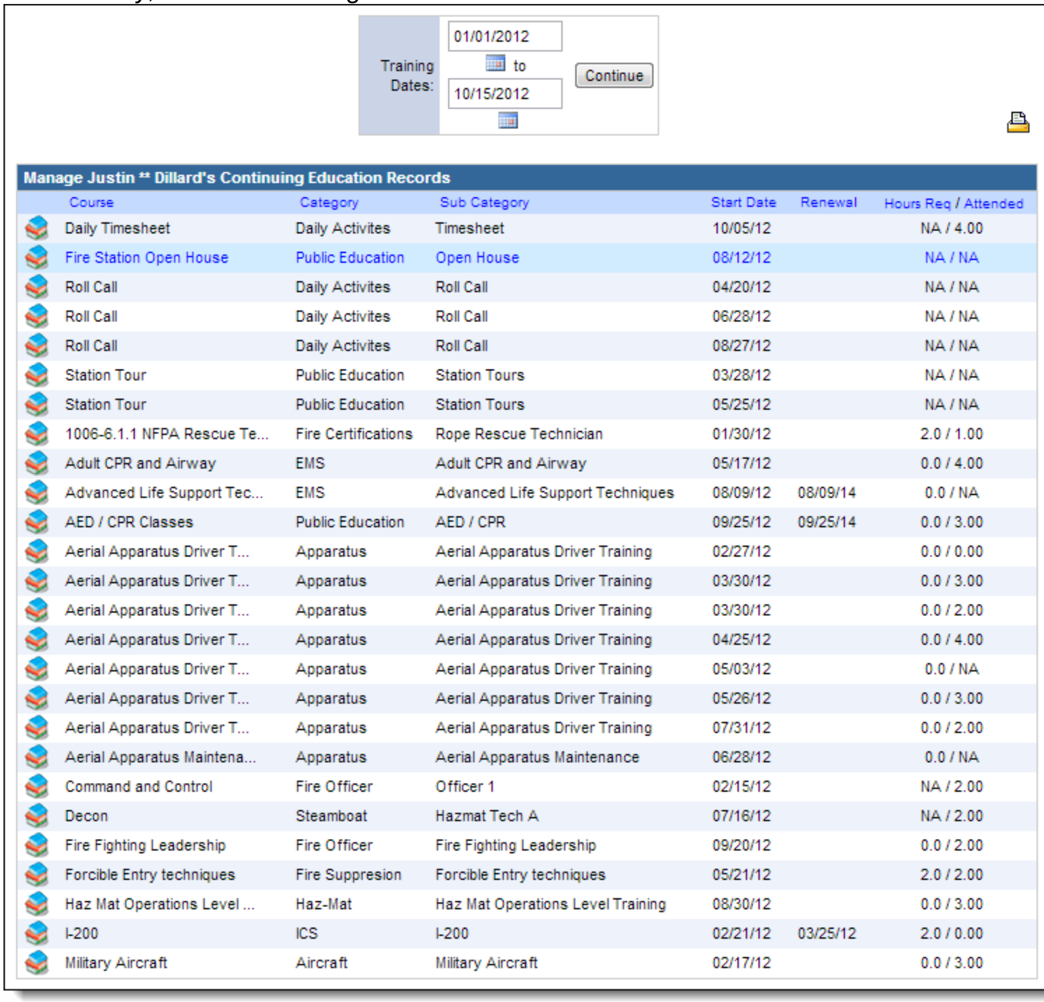
The Training Tab

The *Training* tab keeps records of any continuing education courses that the staff member may complete to update certifications or further their training. Each course record can contain information about the type of class, hours required and completed for the course and the dates of the course and of renewal.

To work with training records:

1. From the staff member's profile, click *Edit.*

2. If necessary, click the *Training* tab.



Training Dates: 01/01/2012 to 10/15/2012 Continue

Manage Justin ** Dillard's Continuing Education Records

Course	Category	Sub Category	Start Date	Renewal	Hours Req / Attended
Daily Timesheet	Daily Activites	Timesheet	10/05/12		NA / 4.00
Fire Station Open House	Public Education	Open House	08/12/12		NA / NA
Roll Call	Daily Activites	Roll Call	04/20/12		NA / NA
Roll Call	Daily Activites	Roll Call	06/28/12		NA / NA
Roll Call	Daily Activites	Roll Call	08/27/12		NA / NA
Station Tour	Public Education	Station Tours	03/28/12		NA / NA
Station Tour	Public Education	Station Tours	05/25/12		NA / NA
1006-6.1.1 NFPA Rescue Te...	Fire Certifications	Rope Rescue Technician	01/30/12		2.0 / 1.00
Adult CPR and Airway	EMS	Adult CPR and Airway	05/17/12		0.0 / 4.00
Advanced Life Support Tec...	EMS	Advanced Life Support Techniques	08/09/12	08/09/14	0.0 / NA
AED / CPR Classes	Public Education	AED / CPR	09/25/12	09/25/14	0.0 / 3.00
Aerial Apparatus Driver T...	Apparatus	Aerial Apparatus Driver Training	02/27/12		0.0 / 0.00
Aerial Apparatus Driver T...	Apparatus	Aerial Apparatus Driver Training	03/30/12		0.0 / 3.00
Aerial Apparatus Driver T...	Apparatus	Aerial Apparatus Driver Training	03/30/12		0.0 / 2.00
Aerial Apparatus Driver T...	Apparatus	Aerial Apparatus Driver Training	04/25/12		0.0 / 4.00
Aerial Apparatus Driver T...	Apparatus	Aerial Apparatus Driver Training	05/03/12		0.0 / NA
Aerial Apparatus Driver T...	Apparatus	Aerial Apparatus Driver Training	05/26/12		0.0 / 3.00
Aerial Apparatus Driver T...	Apparatus	Aerial Apparatus Driver Training	07/31/12		0.0 / 2.00
Aerial Apparatus Maintena...	Apparatus	Aerial Apparatus Maintenance	06/28/12		0.0 / NA
Command and Control	Fire Officer	Officer 1	02/15/12		NA / 2.00
Decon	Steamboat	Hazmat Tech A	07/16/12		NA / 2.00
Fire Fighting Leadership	Fire Officer	Fire Fighting Leadership	09/20/12		0.0 / 2.00
Forcible Entry techniques	Fire Suppresion	Forcible Entry techniques	05/21/12		2.0 / 2.00
Haz Mat Operations Level ...	Haz-Mat	Haz Mat Operations Level Training	08/30/12		0.0 / 3.00
I-200	ICS	I-200	02/21/12	03/25/12	2.0 / 0.00
Military Aircraft	Aircraft	Military Aircraft	02/17/12		0.0 / 3.00

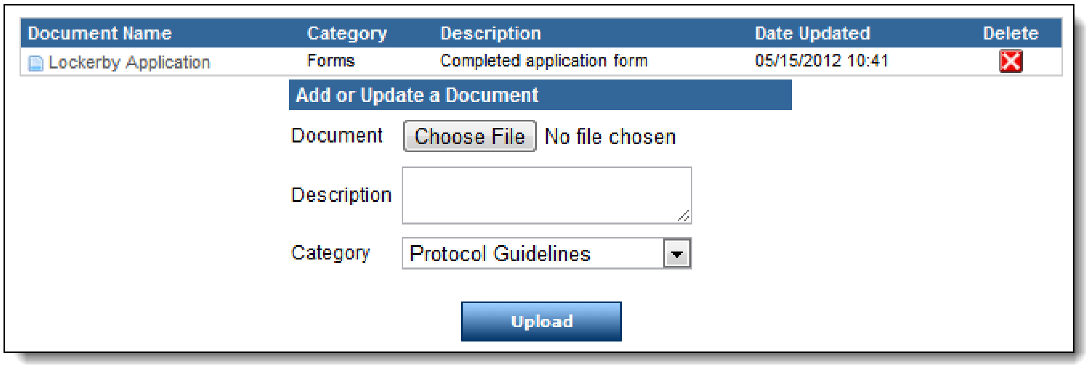
3. To select a date range for the training you want to view, in the *Training Dates* text boxes, type the desired date range.
   OR
   To select the dates from a calendar, click the *Calendar* icons and select the desired dates.
4. To view more complete information about a particular record or to edit it, click the corresponding *Training* icon.
5. To edit the record, use the provided fields to make the changes and click *OK.*

The Documents Tab

The *Documents* tab provides a list of any documents associated with this staff member and allows you to upload additional documents if you need to. You or another administrator will need to set up document categories in order to add documents for staff members.

1. From the staff member's profile, click *Edit.*

2. If necessary, click the *Documents* tab.
   The *Documents* tab appears.



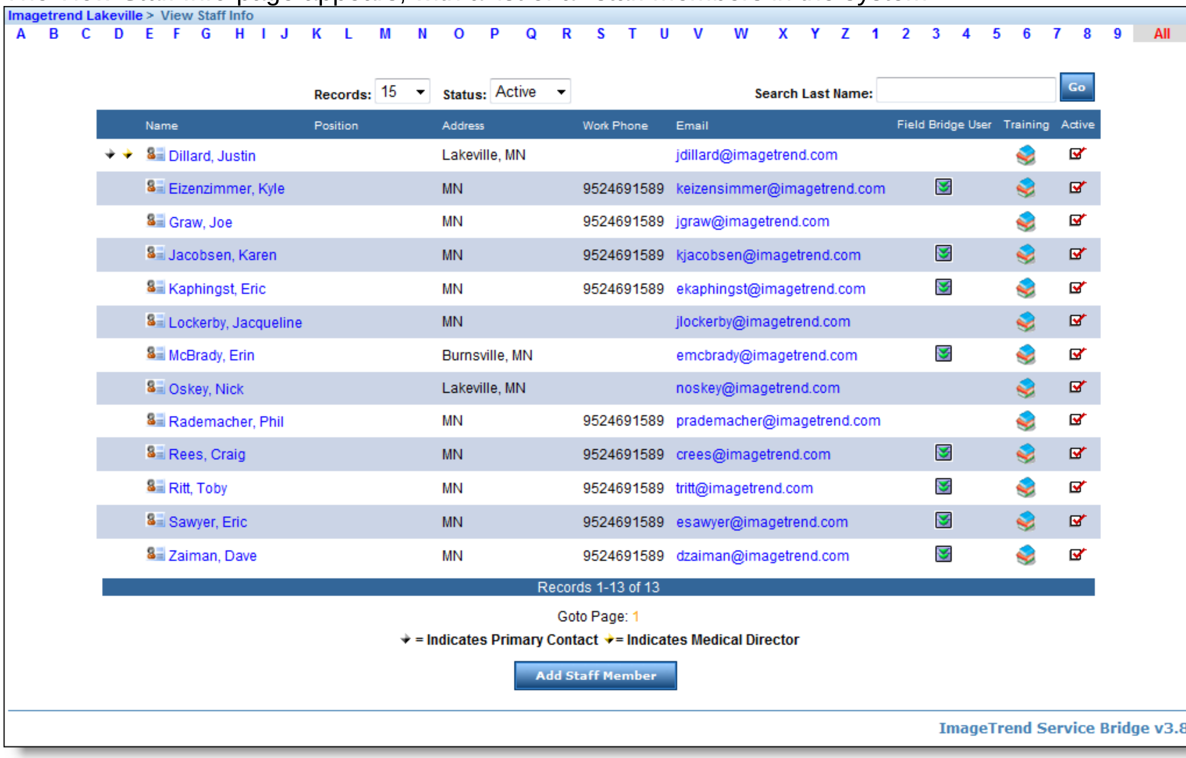
3. To view a document, click the name of the document.
4. To add a document,
   a. In the *Document* section, click *Choose File.*
      The *Choose File* dialog box appears.
   b. Navigate to and select the desired document to upload.
   c. Click *Open.*
      The file is selected.
   d. In the *Description* text box, type any additional details about the document.
   e. From the *Category* drop down menu, select the type of document you are adding.
   f. Click *Upload.*
      The document is added to the staff member's profile.

2.4 Adding Staff Profiles

Each staff member of a service who has access to Field Bridge or who may be included on a run form should have a profile created in the system. This profile can keep track of contact employment and contact information, certifications and training, and associations with the service or particular stations. Staff profiles also give staff members a username and password to sign in to Field Bridge.

1. From the top left, click *My Service.*
   NOTE: If you are working with a Rescue Bridge, you may have a *My Fire Department* link instead of a *My Service* link.

2. Select the *Staff* tab.
   The *View Staff Info* page appears, with a list of all staff members in the system.



Imagetrend Lakeville > View Staff Info

A B C D E F G H I J K L M N O P Q R S T U V W X Y Z 1 2 3 4 5 6 7 8 9 All

Records: 15 Status: Active Search Last Name: Go

Name	Position	Address	Work Phone	Email	Field Bridge User	Training	Active
Dillard, Justin		Lakeville, MN		jdillard@imagetrend.com			
Eizenzimmer, Kyle		MN	9524691589	keizensimmer@imagetrend.com			
Graw, Joe		MN	9524691589	jgraw@imagetrend.com			
Jacobsen, Karen		MN	9524691589	kjacobsen@imagetrend.com			
Kaphingst, Eric		MN	9524691589	ekaphingst@imagetrend.com			
Lockerby, Jacqueline		MN		jlockerby@imagetrend.com			
McBrady, Erin		Burnsville, MN		emcbrady@imagetrend.com			
Oskey, Nick		Lakeville, MN		noskey@imagetrend.com			
Rademacher, Phil		MN	9524691589	prademacher@imagetrend.com			
Rees, Craig		MN	9524691589	crees@imagetrend.com			
Ritt, Toby		MN	9524691589	tritt@imagetrend.com			
Sawyer, Eric		MN	9524691589	esawyer@imagetrend.com			
Zaiman, Dave		MN	9524691589	dzaiman@imagetrend.com			

Records 1-13 of 13

Goto Page: 1

= Indicates Primary Contact = Indicates Medical Director

Add Staff Member

ImageTrend Service Bridge v3.8

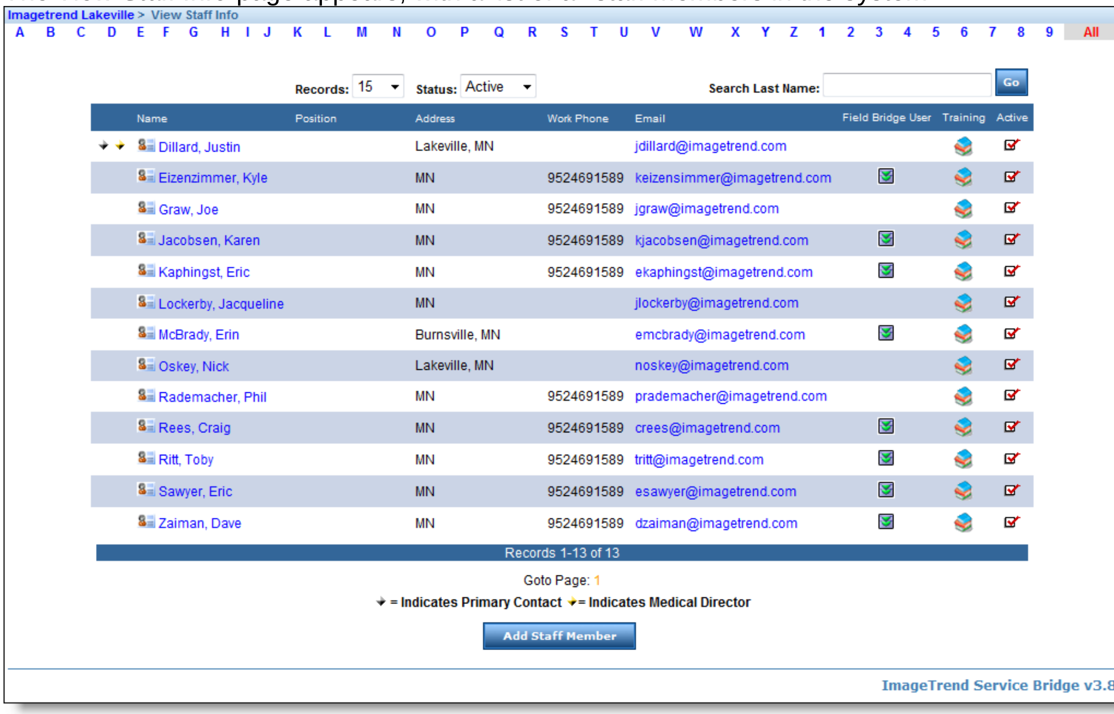
3. Click *Add Staff Member.*
4. Using the provided fields in each tab, enter all desired profile information.
   HINT: The first tab must be completed and saved before any other tabs can be used.
   WARNING: Be sure to save each tab before moving on to a new tab to prevent information from being lost.
5. To save the new profile, click *OK.*
   To return to the list of staff, click *Cancel.*

2.5 Resetting User Passwords

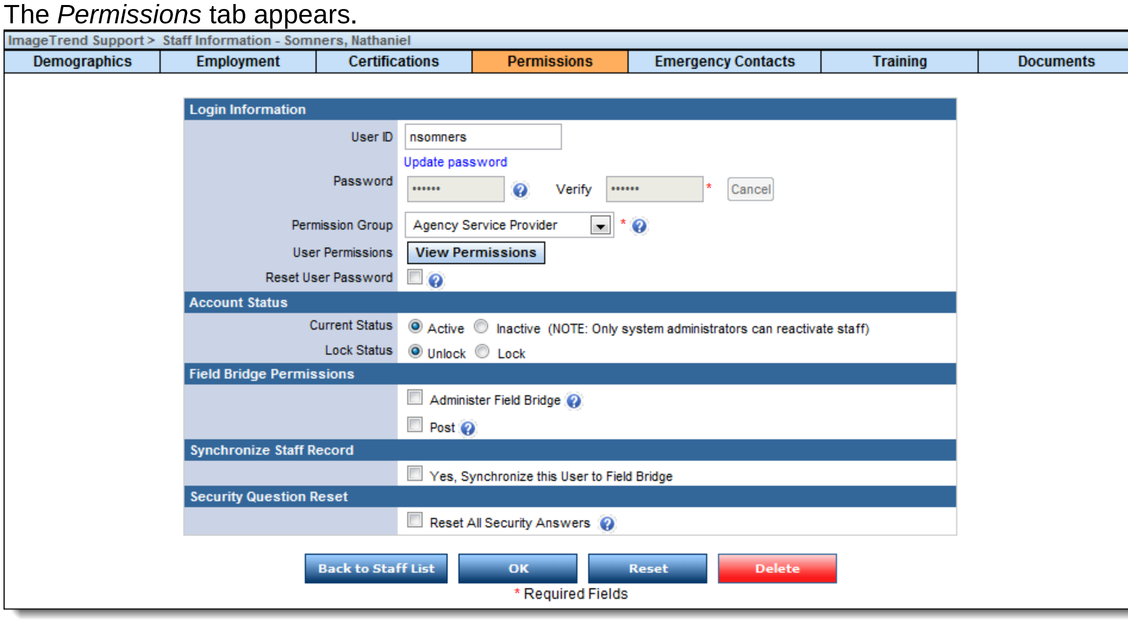
A user's password can be reset if necessary. The new password will be sent to the email address on the user's profile with the new password, and the user will be prompted to change the password upon their next login.

1. From the top left, click *My Service.*
   NOTE: If you are working with a Rescue Bridge, you may have a *My Fire Department* link instead of a *My Service* link.

2. Select the *Staff* tab.
   The *View Staff Info* page appears, with a list of all staff members in the system.



3. Click the desired staff member's name.
4. Select the *Edit* button.
   The staff member's editable profile appears.
5. From the staff profile, select the *Permissions* tab.
   The *Permissions* tab appears.

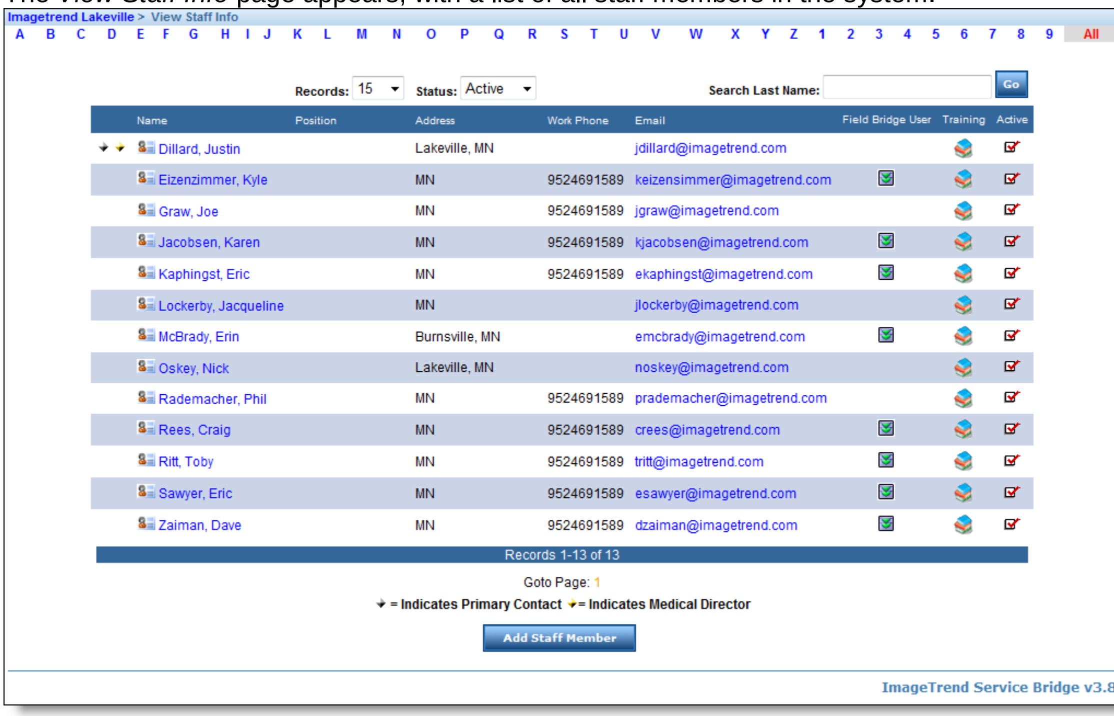


6. Select the *Reset User Password* checkbox.
7. Click *OK.*
   The user's password is reset.

2.6 Deactivating User Accounts

If a user should no longer have access the system, you will need to deactivate that user's account. Deleting the account is highly discouraged, as the user account will also be removed from any past run forms that this user was a part of.

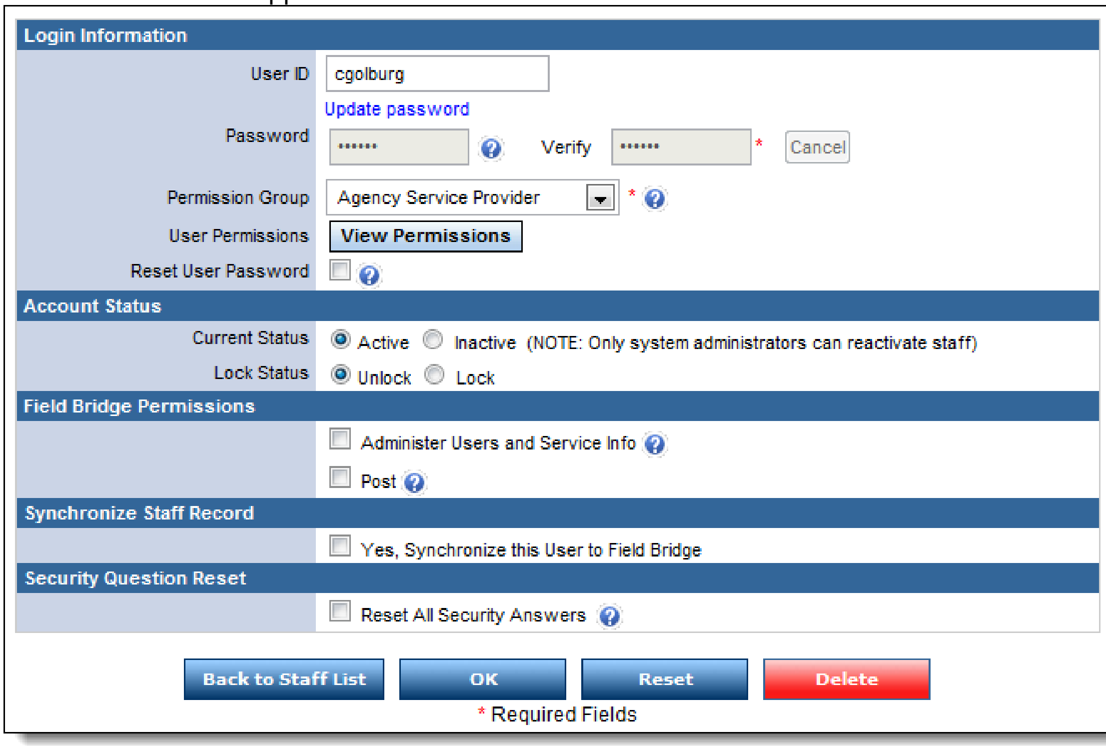
1. From the top left, click *My Service.*
   NOTE: If you are working with a Rescue Bridge, you may have a *My Fire Department* link instead of a *My Service* link.
2. Select the *Staff* tab.
   The *View Staff Info* page appears, with a list of all staff members in the system.



Name	Position	Address	Work Phone	Email	Field Bridge User	Training	Active
Dillard, Justin		Lakeville, MN		jdillard@imagetrend.com			
Eizenzimmer, Kyle		MN	9524691589	keizensimmer@imagetrend.com			
Graw, Joe		MN	9524691589	jgraw@imagetrend.com			
Jacobsen, Karen		MN	9524691589	kjacobsen@imagetrend.com			
Kaphingst, Eric		MN	9524691589	ekaphingst@imagetrend.com			
Lockerby, Jacqueline		MN		jlockerby@imagetrend.com			
McBrady, Erin		Burnsville, MN		emcbrady@imagetrend.com			
Oskey, Nick		Lakeville, MN		noskey@imagetrend.com			
Rademacher, Phil		MN	9524691589	prademacher@imagetrend.com			
Rees, Craig		MN	9524691589	crees@imagetrend.com			
Ritt, Toby		MN	9524691589	tritt@imagetrend.com			
Sawyer, Eric		MN	9524691589	esawyer@imagetrend.com			
Zaiman, Dave		MN	9524691589	dzaiman@imagetrend.com			

3. Click the desired staff member's name.
4. Select the *Edit* button.
   The staff member's editable profile appears.

5. From the staff profile, select the *Permissions* tab.
   The *Permissions* tab appears.



6. In the *Account Status* section, select *Inactive.*
7. Click *OK.*
   The user account is set to inactive and the user will no longer be able to access the system.

CHAPTER 3

WORKING WITH INCIDENTS

3.1 Chapter Overview

Administrators can work with existing runs to post or delete them from the Field Bridge system. While some providers may be able to perform these actions, depending on your service's permissions, these may be primarily administrative tasks. This chapter explains how to post all or selected runs and how to delete selected runs.

3.2 Posting Incidents

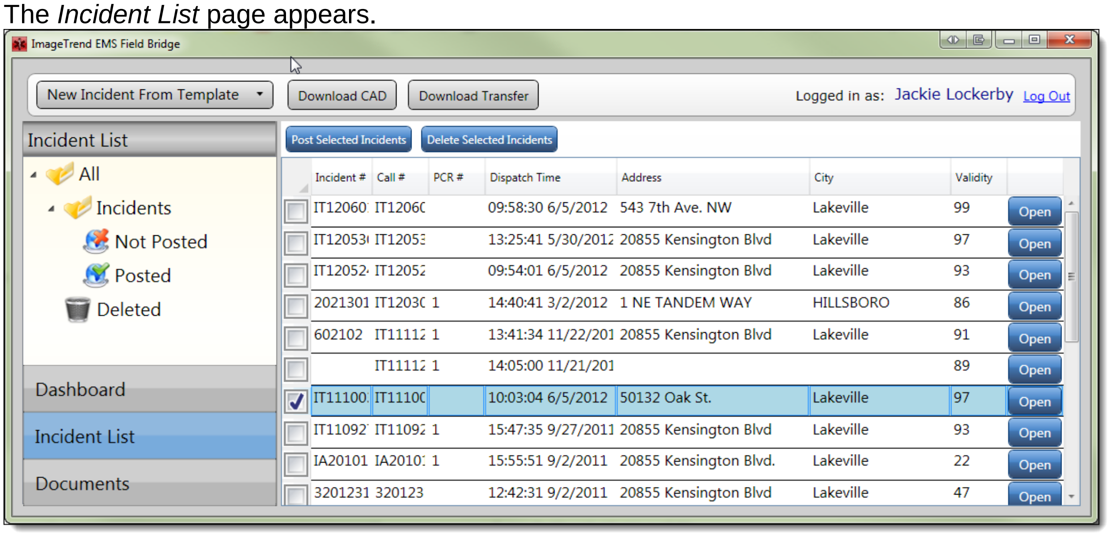
When incidents are completed, they can be submitted to the Service Bridge, State Bridge or Rescue Bridge for your organization to review and, if necessary, submit to the state or another organization. Incidents will only be available locally on this computer using the Field Bridge until they are posted. Not all users may be able to post, according to their permissions. For users without access to posting, the *Post* button will be non-clickable and shown in grey.

Based on the validity of the report and the settings created in the Service Bridge, State Bridge or Rescue Bridge, you may need to complete additional fields or specify a reason for the lack of completion before a run report can be submitted. In this case, the *Post* button will be non-clickable and shown in all grey.

Depending on your service's needs, you can post run reports from the *Incident List* page or from each individual run form.

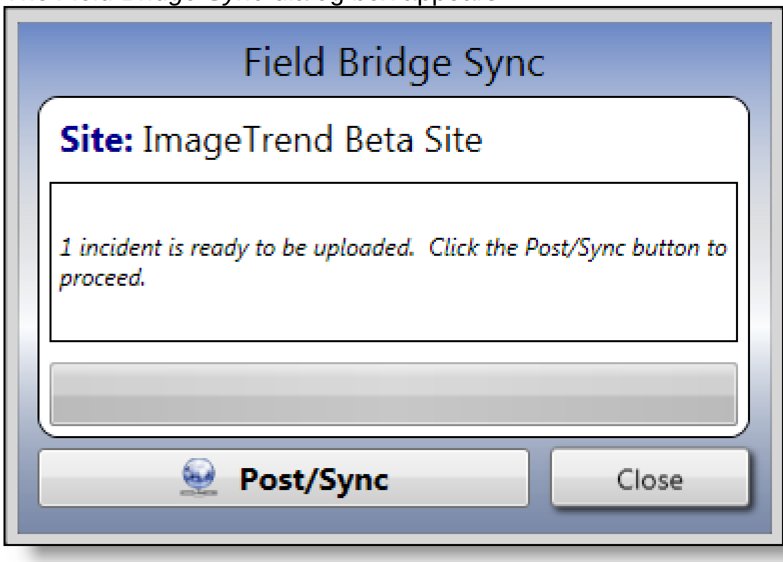
Posting Incidents: From the Incident List

1. From the task pane, click *Incident List.*
   The *Incident List* page appears.



2. To select specific run reports to post, select the checkbox(es) in front of each of the incidents.
   OR
   To select all run reports, click the grey box directly above the column of checkboxes.

3. Click the *Post Selected Incidents* button.
   The *Field Bridge Sync* dialog box appears.



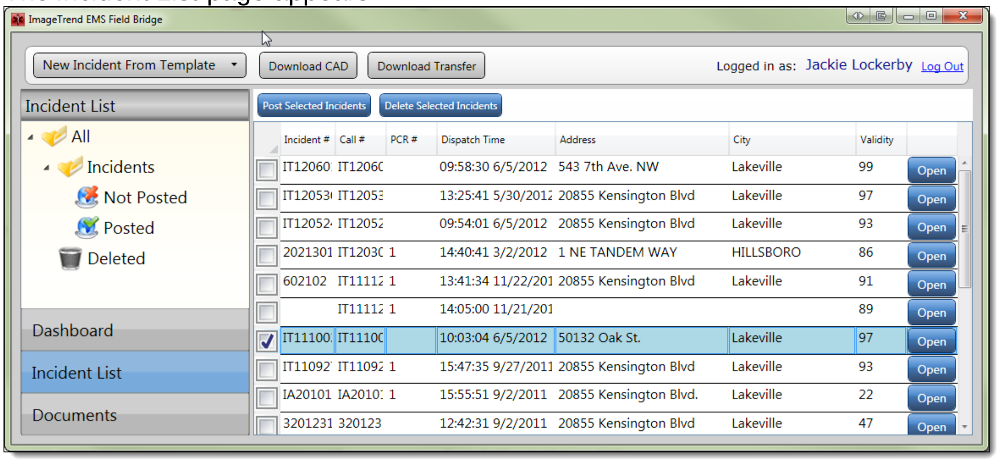
4. Click *Post/Sync.*
   When syncing is finished, the dialog box displays a *Sync successfully finished* message.
5. Click *Close.*

Posting Incidents: From the Run Report

1. To open one of the last ten incidents, from the dashboard, from the *My Last 10 Incidents* section, click *Open.*

The run form appears.
OR
To open another incident,

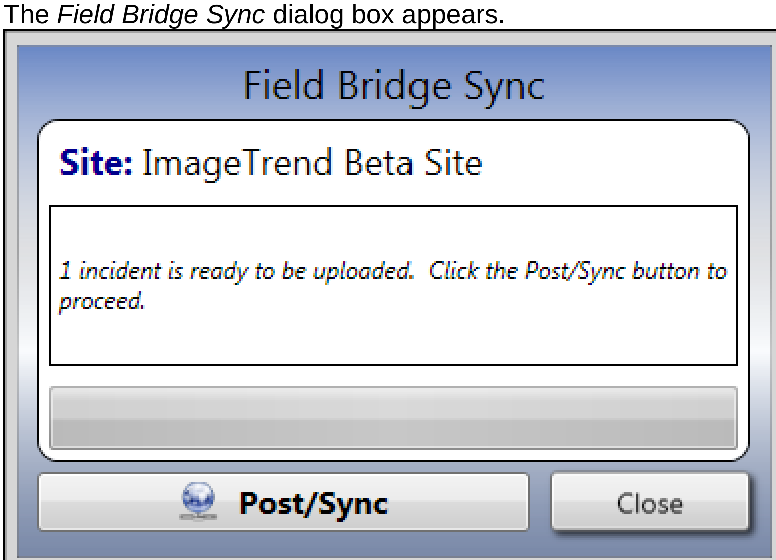
a. From the task pane, select *Incident List.*
The *Incident List* page appears.



b. If necessary, from the left menu, select the type of runs to view.
c. For the desired run, click *Open.*
The run form appears.

2. From the run form toolbar, click *Post* .

The *Field Bridge Sync* dialog box appears.



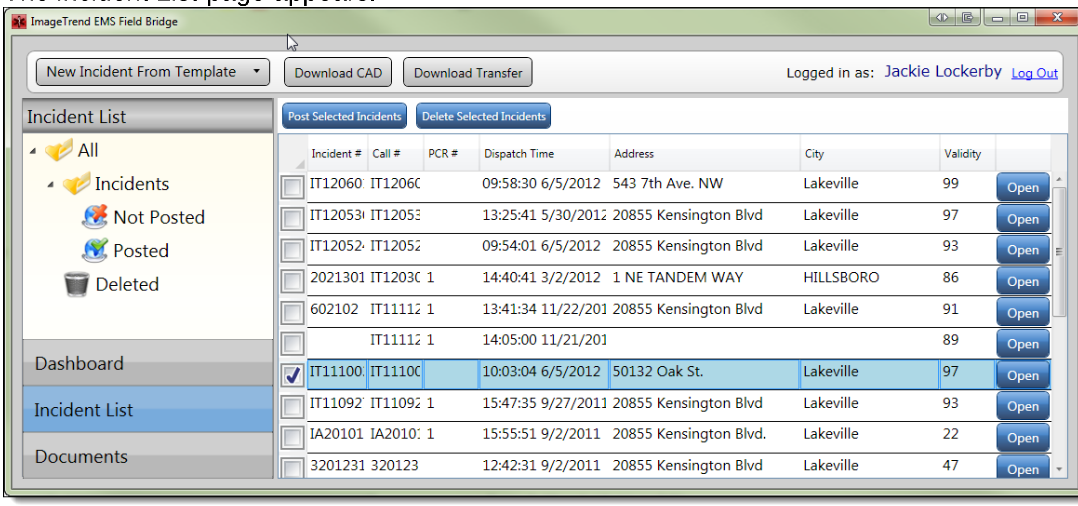
3. Click *Post/Sync.*
4. When syncing is finished, the dialog box displays a *Sync successfully finished* message.
5. Click *Close.*

3.3 Deleting Incidents

After incidents have been posted or if you create test incidents, they can be deleted from the Field Bridge. Deleted runs are moved to the *Deleted* folder, where they can be permanently removed. Incidents can be deleted either from the incident list or from an individual run report. Depending on your service's settings, run forms may be deleted automatically after a certain period of time.

Deleting Incidents: From the Incident List

1. From the task pane, click *Incident List.*
   The *Incident List* page appears.



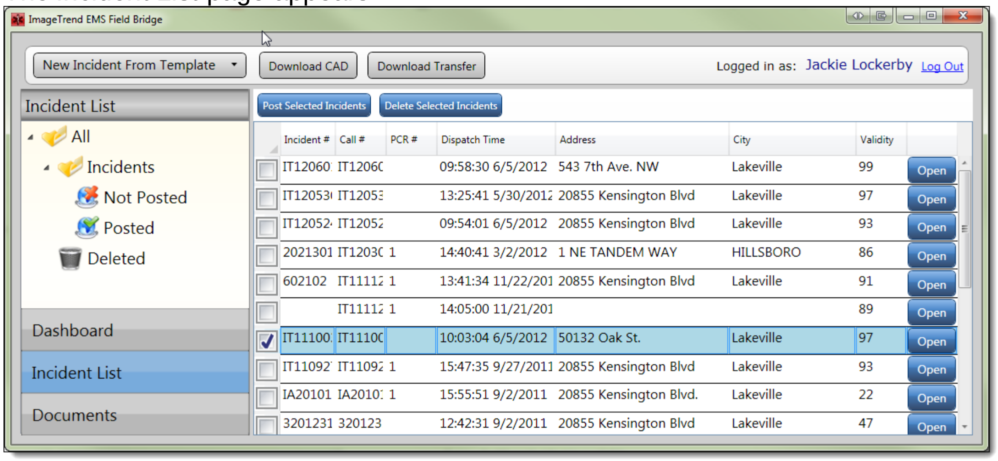
2. To select specific run reports to delete, select the checkbox(es) in front of each of the incidents.
   OR
   To select all run reports, click the grey box directly above the column of checkboxes.
3. Click the *Delete Selected Incidents* button.
   A confirmation dialog box appears.
4. Click *Yes.*
   The run report(s) are moved to the *Deleted* folder.
5. To permanently delete the run report(s), from the left menu, select the *Deleted* folder.
   The *Deleted Incidents* page appears.
6. To select specific run reports to delete, select the checkbox(es) in front of each of the incidents.
   OR
   To select all run reports, click the grey box directly above the column of checkboxes.
7. Click *Clear Selected Incidents.*
   A confirmation dialog box appears.
8. Click *Yes.*
   The run report(s) are permanently deleted.

Deleting Incidents: From the Run Report

1. To open one of the last ten incidents, from the dashboard, from the *My Last 10 Incidents* section, click *Open.*

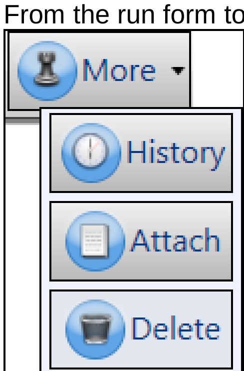
   The run form appears.
   OR
   To open another incident,

a. From the task pane, select *Incident List.*
The *Incident List* page appears.



b. If necessary, from the left menu, select the type of runs to view.
c. For the desired run, click *Open.*
The run form appears.

2. From the run form toolbar, click *More >> Delete.*



NOTE: This option will not be available if the run report has not yet been saved.
A confirmation dialog box appears.

3. Click *Yes.*
The run report(s) are moved to the *Deleted* folder.
4. From the task pane, click *Incident List.*
The incident list appears.
5. To permanently delete the run report(s), from the left menu, select the *Deleted* folder.
The *Deleted Incidents* page appears.
6. To select specific run reports to delete, select the checkbox(es) in front of each of the incidents.
OR
To select all run reports, click the grey box directly above the column of checkboxes.
7. Click *Clear Selected Incidents.*
A confirmation dialog box appears.
8. Click *Yes.*
The run report(s) are permanently deleted.

CHAPTER 4

INCIDENT REPORTING SETUP

4.1 Chapter Overview

Administrators can edit certain features that appear on the run form, the way that run form actions work and the run form itself. This chapter explains how to edit this information in Service Bridge/State Bridge/Rescue Bridge and Field Bridge, as appropriate for each feature.

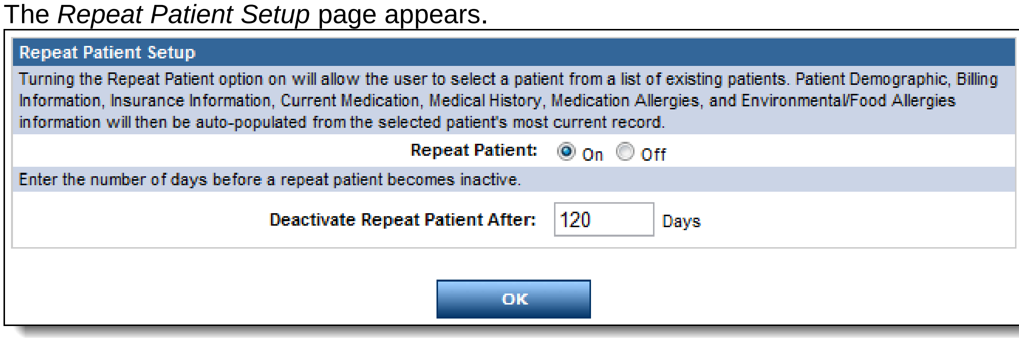
4.2 Working with Repeat Patients

The Repeat Patient feature allows you to keep records for patients who you frequently encounter, allowing your providers to quickly pull saved information about those patients (e.g., name, address, medical history, allergies, next of kin) into their run forms instead of filling out the information manually for each incident.

Enabling the Repeat Patient Feature

In order to enable your system to keep repeat patient records and to allow providers to enter repeat patient records into run forms, you must enable the repeat patient feature. This option will apply both to the Field Bridge and to the Service Bridge/State Bridge/Rescue Bridge for this service.

1. From the top left, click *My Service.*
2. Select the *Setup* tab.
3. Under the *Run Forms* section, select *EMS Form Configuration.*
   A sub-menu appears.
4. Under *EMS Form Resources,* select *Repeat Patient.*
   The *Repeat Patient Setup* page appears.



5. In the first section, select whether the repeat patient feature should or should not be available for use.
6. **OPTIONAL:** In the *Deactivate Repeat Patient After* section, type the number of days after which a repeat patient should be deactivated if not treated or transported.
7. When finished, click *OK.*
   The settings are saved.

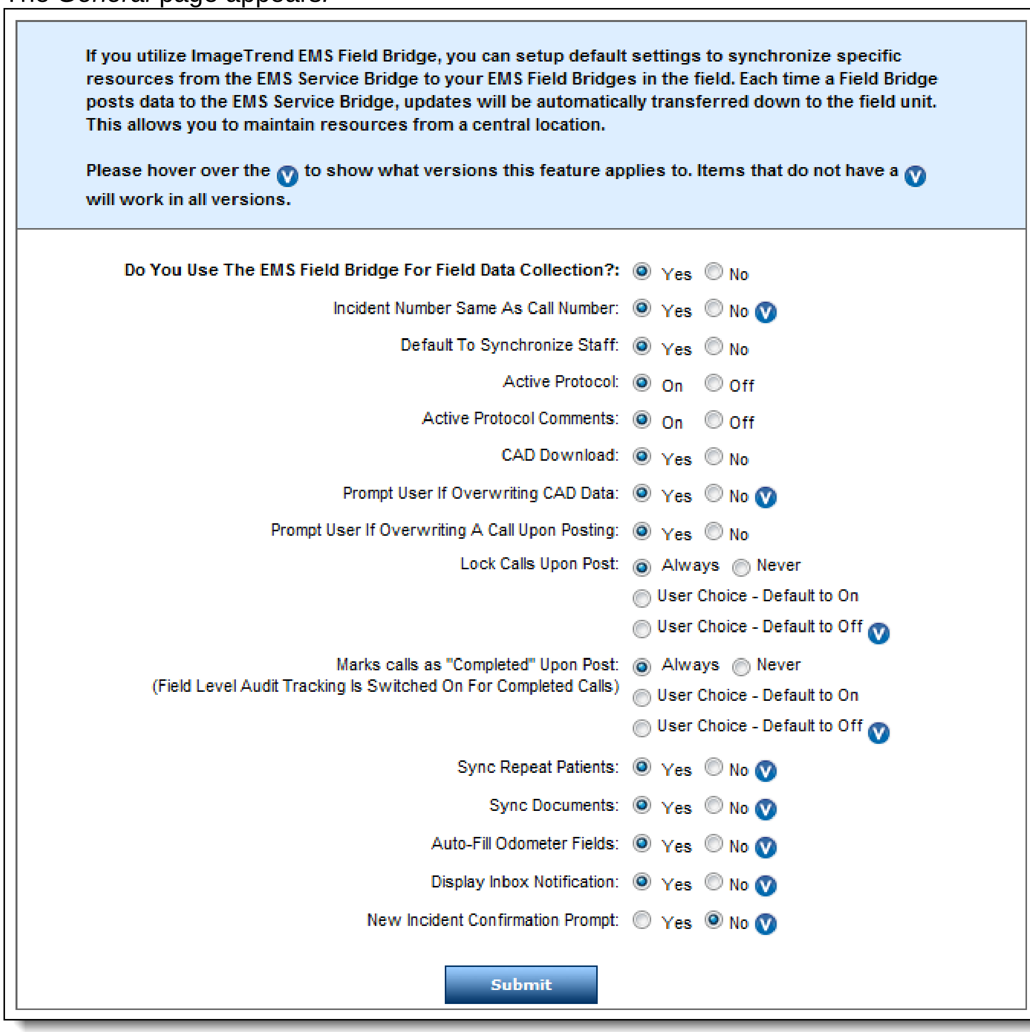
Setting Up the Repeat Patient Feature for Field Bridge

After you have enabled the Repeat Patient feature, you can choose how you want to access repeat patient records from the Field Bridge. You have the option either to sync repeat patient records to Field Bridge or to search online for repeat patients; each option has benefits for agencies in different situations.

If you choose to **sync** repeat patient records, providers will always be able to access repeat patient records from the Field Bridge. However, if you have a lot of repeat patient records, syncing may take a long time as all the information is updated. Please consider that after turning sync for repeat patients on, the first sync for each Field Bridge will take a much longer time, as all repeat patient information is being downloaded (instead of just updated data).

If you choose to **search online** for repeat patient records, no repeat patient data will be stored on the computer with the Field Bridge (except when it is entered into a run form). This can speed up the syncing process and free up space on your computer. However, providers will only be able to access repeat patient information if they are connected to the Internet.

1. From the upper left, select *My Service.*
2. Select the *Setup* tab.
   The *Setup* tab appears.
3. Under the *Field Bridge* section, select *Preferences.*
   A sub-menu appears.
4. Under *Preferences,* select *General*.
   The *General* page appears.



If you utilize ImageTrend EMS Field Bridge, you can setup default settings to synchronize specific resources from the EMS Service Bridge to your EMS Field Bridges in the field. Each time a Field Bridge posts data to the EMS Service Bridge, updates will be automatically transferred down to the field unit. This allows you to maintain resources from a central location.

Please hover over the V to show what versions this feature applies to. Items that do not have a V will work in all versions.

Do You Use The EMS Field Bridge For Field Data Collection?:	Yes No
Incident Number Same As Call Number:	Yes No V
Default To Synchronize Staff:	Yes No
Active Protocol:	On Off
Active Protocol Comments:	On Off
CAD Download:	Yes No
Prompt User If Overwriting CAD Data:	Yes No V
Prompt User If Overwriting A Call Upon Posting:	Yes No
Lock Calls Upon Post:	Always Never User Choice - Default to On User Choice - Default to Off V
Marks calls as "Completed" Upon Post: (Field Level Audit Tracking Is Switched On For Completed Calls)	Always Never User Choice - Default to On User Choice - Default to Off V
Sync Repeat Patients:	Yes No V
Sync Documents:	Yes No V
Auto-Fill Odometer Fields:	Yes No V
Display Inbox Notification:	Yes No V
New Incident Confirmation Prompt:	Yes No V

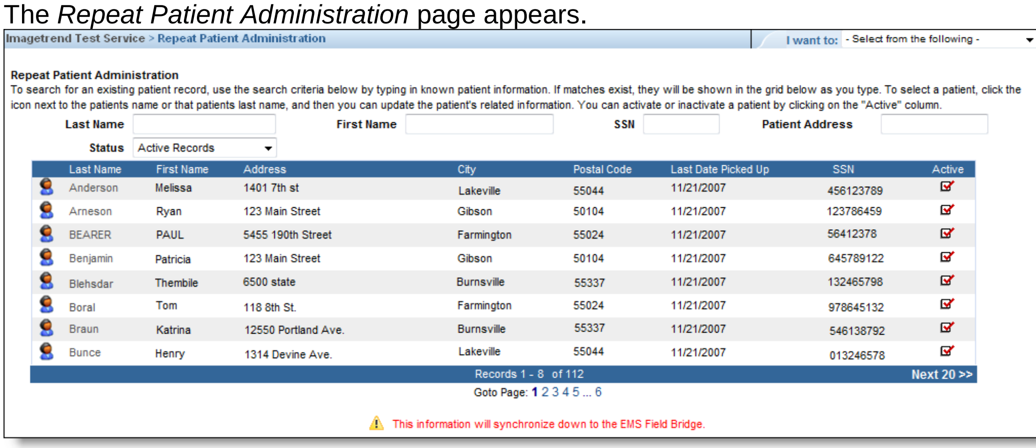
Submit

5. To set repeat patient records to sync to the Field Bridge, in the *Sync Repeat Patients* section, select *Yes.*
   OR
   To search online for repeat patients,
   a. In the *Sync Repeat Patients* section, select *No.*
      The *Online Repeat Patient Search* option appears.
   b. In the *Online Repeat Patient Search* section, select *Yes.*
6. When you have the desired setting assigned, click *Submit.*
   The settings are saved.

Managing Repeat Patient Records

Administrators can manage the database of repeat patients, ensuring that staff member will not need to search through duplicate records, deceased patients or patients who are unlikely to receive service again to find the correct repeat patient for a call. Individual repeat patient accounts can be marked as inactive to hide them from the list that service providers will see in a run form, and can be edited to provide the most up-to-date information for a particular patient.

1. From the upper left, select *My Service.*
2. Select the *Setup* tab.
   The *Setup* tab appears.
3. Under the *Service Settings and Resources* section, select *EMS.*
   A sub-menu appears.
4. Under *EMS,* select *Repeat Patient Records.*
   The *Repeat Patient Administration* page appears.



Imagetrend Test Service > Repeat Patient Administration | I want to: - Select from the following -

Repeat Patient Administration

To search for an existing patient record, use the search criteria below by typing in known patient information. If matches exist, they will be shown in the grid below as you type. To select a patient, click the icon next to the patients name or that patients last name, and then you can update the patient's related information. You can activate or inactivate a patient by clicking on the "Active" column.

Last Name | First Name | SSN | Patient Address

Status: Active Records

Last Name	First Name	Address	City	Postal Code	Last Date Picked Up	SSN	Active
Anderson	Melissa	1401 7th st	Lakeville	55044	11/21/2007	456123789	
Arneson	Ryan	123 Main Street	Gibson	50104	11/21/2007	123786459	
BEARER	PAUL	5455 190th Street	Farmington	55024	11/21/2007	56412378	
Benjamin	Patricia	123 Main Street	Gibson	50104	11/21/2007	645789122	
Blehsdar	Thembile	6500 state	Burnsville	55337	11/21/2007	132465798	
Boral	Tom	118 8th St.	Farmington	55024	11/21/2007	978645132	
Braun	Katrina	12550 Portland Ave.	Burnsville	55337	11/21/2007	546138792	
Bunce	Henry	1314 Devine Ave.	Lakeville	55044	11/21/2007	013246578	

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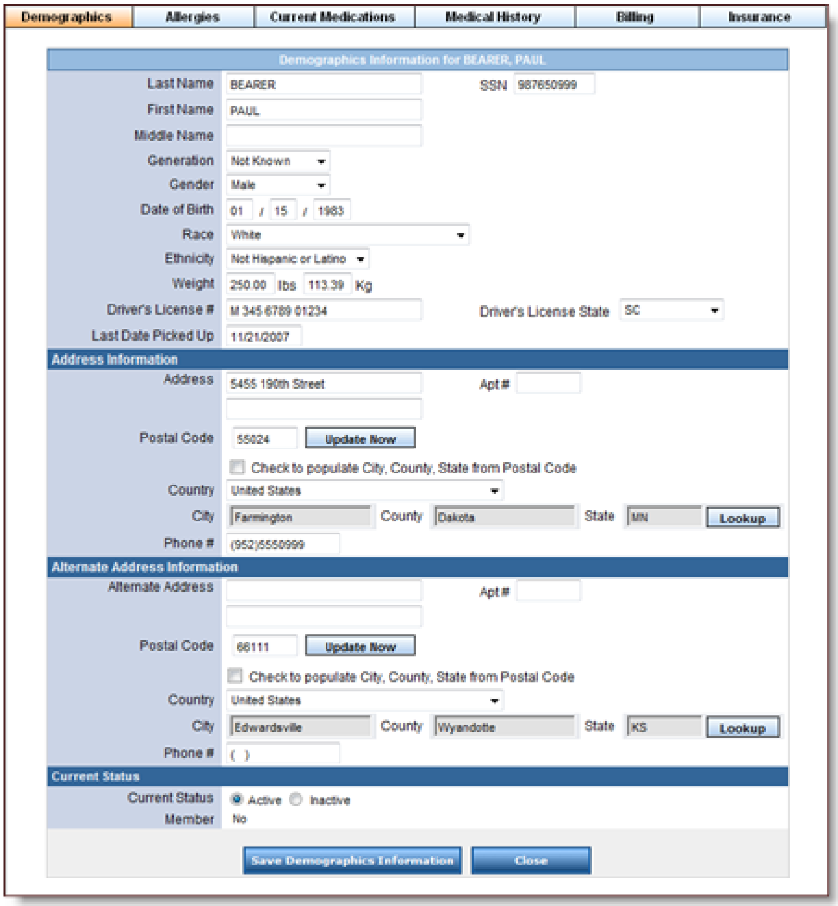
Goto Page: 1 2 3 4 5 ... 6

This information will synchronize down to the EMS Field Bridge.

5. To find repeat patients fitting particular criteria, using the fields at the top of the page, select or type in the criteria.
   Records matching those criteria appear.
6. To view or edit a particular record, click the patient's last name.
   The patient's record appears in a new window.
   NOTE: After making changes to each tab, click *Save (Tab Name) Information* before switching to a new tab.
   WARNING: If information is not saved before opening a new tab, any changes will

be lost.



7. In the *Demographics* tab, enter any information regarding the patient's address or personal demographics.
8. To prevent a patient from appearing in the list of repeat patients on a run form, in the *Current Status* section, select *Inactive.*

   NOTE: This record will still be available in the Service Bridge system to administrators, but will need to be activated again to select from the run form as a repeat patient.
9. Click *Save Demographics Information.*
10. Click the *Allergies* tab.
11. Select whether the allergy is for a medication or environmental/food allergy.
12. Use the provided fields to enter information about the allergy.
13. When finished, before entering another allergy or moving to the next tab, click *Save (Allergy Type).*
14. Repeat steps 11–13 until all known allergies are saved.
15. Click the *Current Medications* tab.
16. Using the provided fields, enter information for a medication the patient is currently taking.
17. When finished, before entering another medication or moving to the next tab, click *Save Current Medication.*
18. Repeat steps 15–16 until all medications are entered.
19. Click the *Medical History* tab.
20. From the scroll box, select all known medical history options.

    HINT: To select multiple options, press and hold *Ctrl* while clicking each option.
21. Click *Save Medical History Info.*
22. Click the *Billing* tab.

23. Enter information for billing the patient.
24. When finished, click *Save Billing Information.*
25. Click the *Insurance* tab.
26. Enter the patient's insurance information.
27. Click *Save Insurance.*
28. When finished, click *Close.*

4.3 Working with Service Defined Questions

Administrators can create new questions and a section to include them in on their service's run form. This allows a particular service to gather data that is particularly relevant to their service but may not be already included in the form. Depending on permissions, all users will generally be able to view a list of these custom questions, but only administrators will be able to edit them or add new questions. Administrators can also designate specific service defined questions are required, which will include those questions in calculation of a validity score. Each required service defined question will be worth one point for run validity.

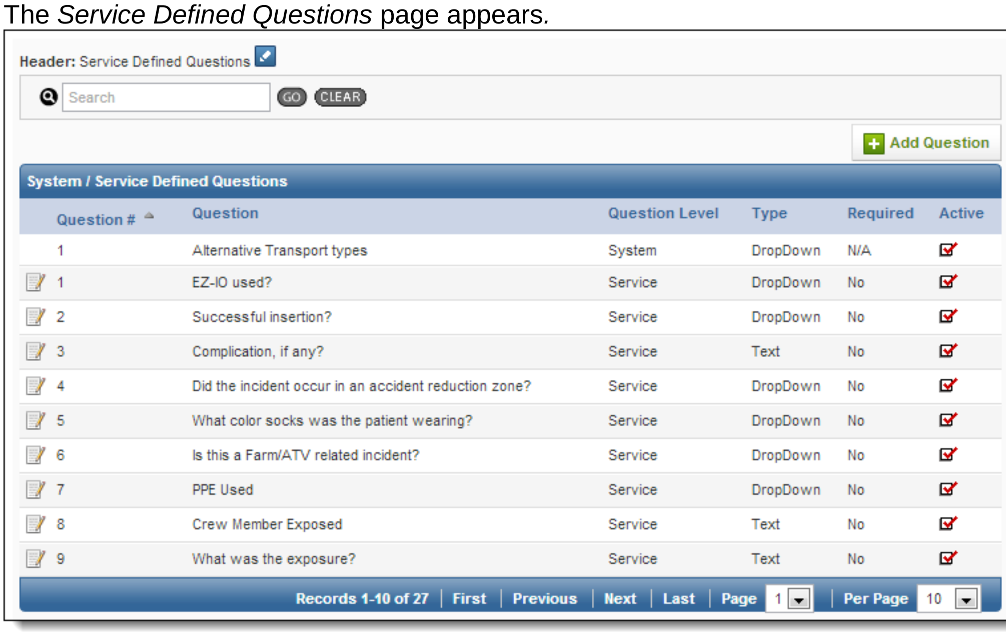
If your service uses the dynamic run form, service defined questions can be placed in any panel and tab that you specify when creating your run form template.

Service Defined Questions on Standard Run Forms

Service defined questions are collected in a single section on the standard run form, which the administrator can give an appropriate title. When creating and editing service defined questions, administrators can use the *Question #* text box to define the order of each question.

To change the title of the section for service defined questions:

1. In the Web-based system, from the top left, click *My Service* or *My Fire Department.*
2. Select the *Setup* tab.
3. Under the *Service Settings and Resources* section, select *EMS.*
   A sub-menu appears.
4. Under *EMS,* select *Service Defined Questions.*
   The *Service Defined Questions* page appears.

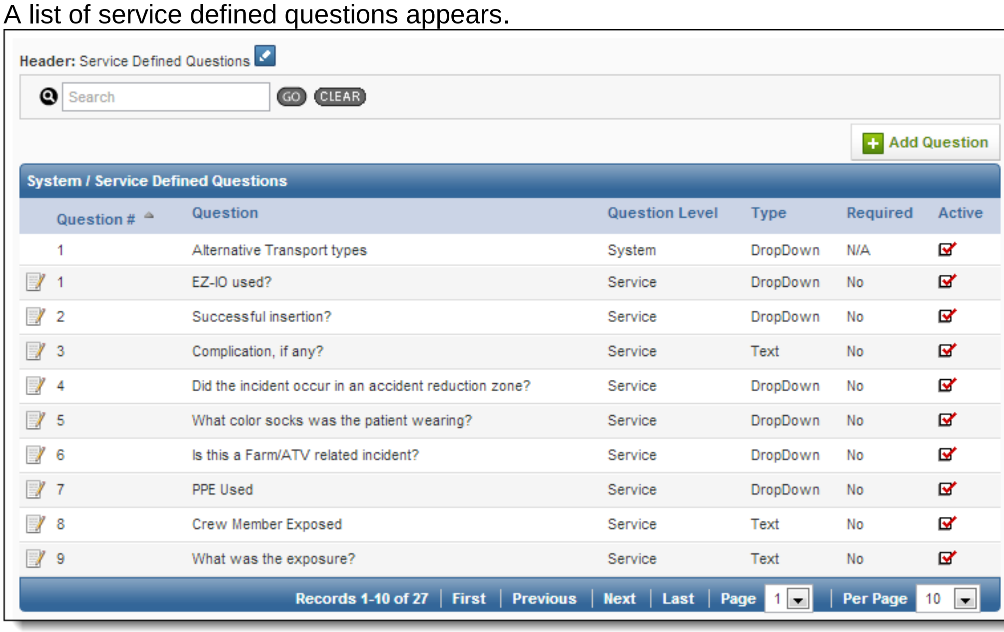


5. In the *Header* text box, type a name for the section.
6. Click *Submit.*

Viewing and Editing Service Defined Questions

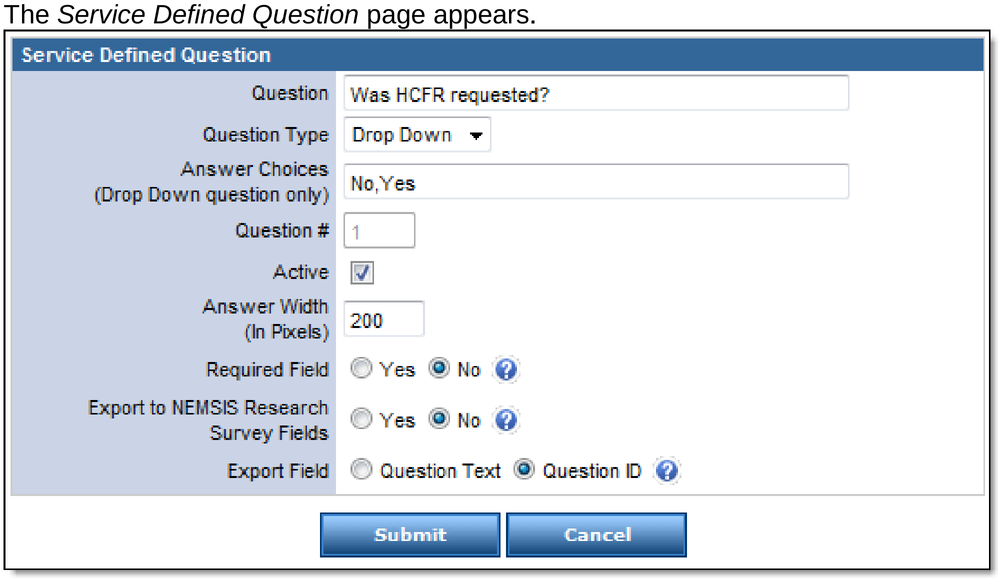
Administrators can view and edit service defined questions from the same place. Administrators can also designate specific service defined questions are required, which will include those questions in calculation of a validity score. Each required service defined question will be worth one point for run validity.

1. In the Web-based system, from the top left, click *My Service* or *My Fire Department.*
2. Select the *Setup* tab.
3. Under the *Service Settings and Resources* section, select *EMS.*
   A sub-menu appears.
4. Under *EMS,* select *Service Defined Questions.*
   A list of service defined questions appears.



Question #	Question	Question Level	Type	Required	Active
1	Alternative Transport types	System	DropDown	N/A	
1	EZ-IO used?	Service	DropDown	No	
2	Successful insertion?	Service	DropDown	No	
3	Complication, if any?	Service	Text	No	
4	Did the incident occur in an accident reduction zone?	Service	DropDown	No	
5	What color socks was the patient wearing?	Service	DropDown	No	
6	Is this a Farm/ATV related incident?	Service	DropDown	No	
7	PPE Used	Service	DropDown	No	
8	Crew Member Exposed	Service	Text	No	
9	What was the exposure?	Service	Text	No	

5. To view or edit a particular question, click the corresponding *Edit* button.
   The *Service Defined Question* page appears.



6. **OPTIONAL:** To change the question, available answers, or question setup,
   a. Use the provided fields to enter all information about the question.
      NOTE: For this option to appear on a run form, be sure the *Active* checkbox is

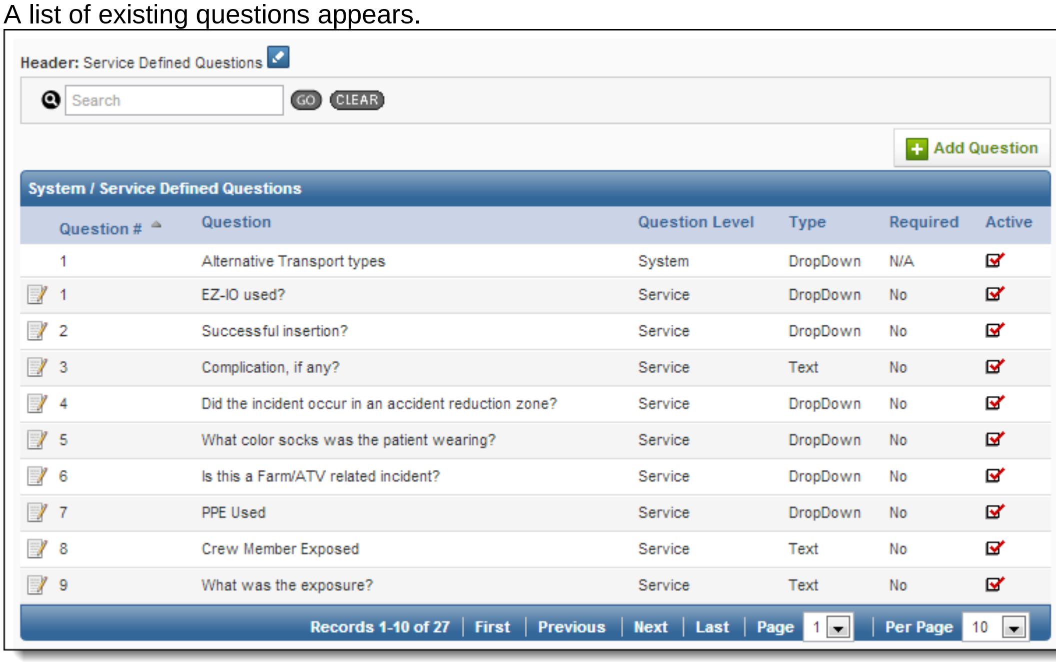
selected. To include this run in validity scores, ensure that *Yes* is selected in the *Required Field* section.

b. When finished, to save the changes, click *Submit.*

Adding a New Service Defined Question

Only administrators can add a new question to the system.

1. In the Web-based system, from the top left, click *My Service* or *My Fire Department.*
2. Select the *Setup* tab.
3. Under the *Service Settings and Resources* section, select *EMS.*
   A sub-menu appears.
4. Under *EMS,* select *Service Defined Questions.*
   A list of existing questions appears.



Header: Service Defined Questions

Search GO CLEAR

Add Question

System / Service Defined Questions

Question #	Question	Question Level	Type	Required	Active
1	Alternative Transport types	System	DropDown	N/A	
1	EZ-IO used?	Service	DropDown	No	
2	Successful insertion?	Service	DropDown	No	
3	Complication, if any?	Service	Text	No	
4	Did the incident occur in an accident reduction zone?	Service	DropDown	No	
5	What color socks was the patient wearing?	Service	DropDown	No	
6	Is this a Farm/ATV related incident?	Service	DropDown	No	
7	PPE Used	Service	DropDown	No	
8	Crew Member Exposed	Service	Text	No	
9	What was the exposure?	Service	Text	No	

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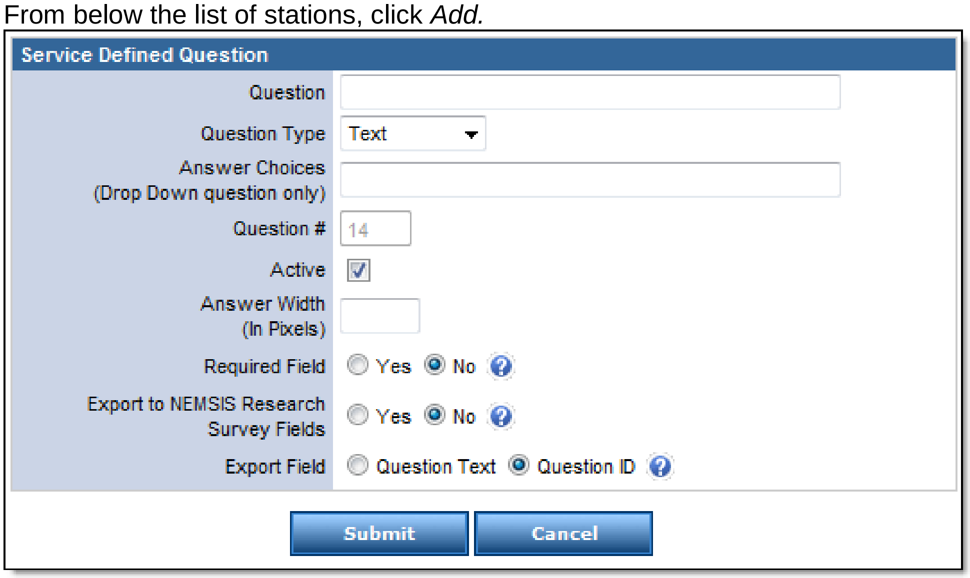
5. From below the list of stations, click *Add.*



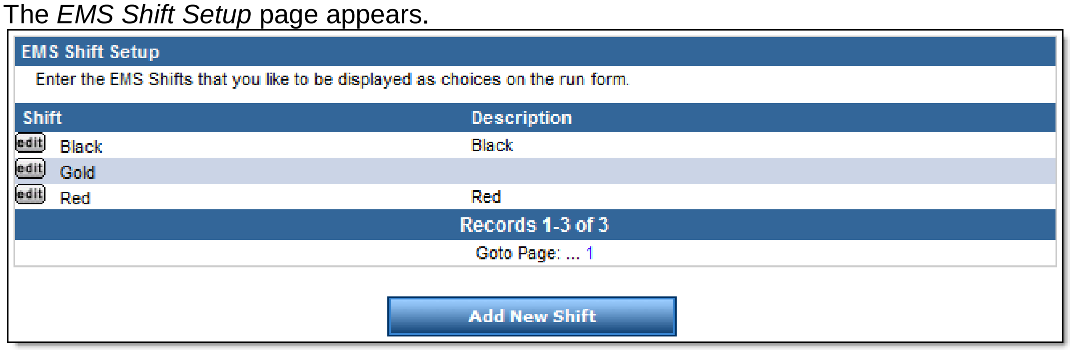
6. In the *Question* text box, type the desired question.

7. From the *Question Type* drop down menu, select the type of answer that should be given for this question (e.g., selected from a drop down menu or a text box for free typing).
8. If *Drop Down* is selected, to enter the possible answers, in the *Answer Choices* text box, type each possible answer separated by a comma (**,**).
9. To enable this question to currently be in use, select the *Active* checkbox.
   OR
   To keep this question in the system but prevent it from currently appearing on run forms, deselect the *Active* checkbox.
10. To select how wide the field will appear for this question (in pixels), in the *Answer Width* text box, type the number of pixels wide that the field should appear.
11. To make this field required and subtract a point from the validity score if it is not completed, in the *Required Field* section, select *Yes.*
12. In the *Export to NEMSIS Research Survey Fields,* select whether this question and its answers should be included in NEMSIS exports.
13. If you chose to include this question in NEMSIS exports, in the *Export Field* section, select whether the export should include the question number or the text of the question.
14. When finished, to save the new question in the system, click *Submit.*
    To return to the list of questions without saving the new question, click *Cancel.*

4.4 Setting Up EMS Shifts

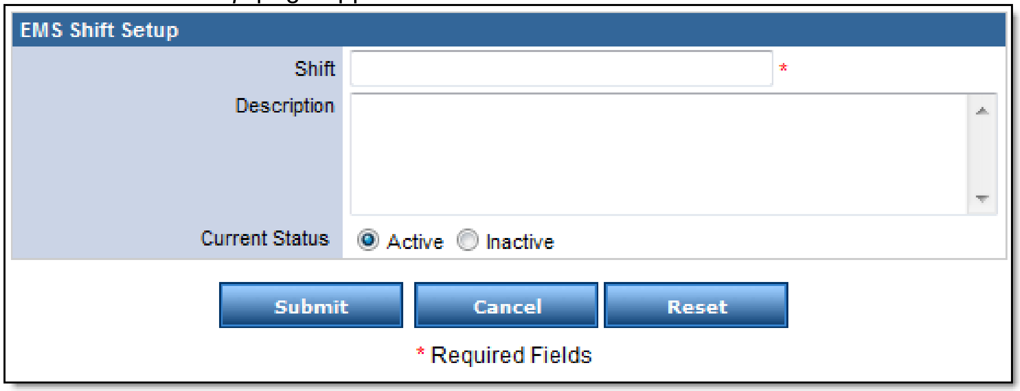
You can record which EMS shift is on duty either on the Dashboard of a Field Bridge or, if the field is added to a run form, on your run form. Before this, however, you must set up the names of your shifts. Please note that to include this information in your runs forms, the field must be added in the Run Form Layout Editor.

1. In the Web-based system, from the top left, click *My Service.*
2. Select the *Setup* tab*.*
3. Under the *Service Settings and Resources* section, select *Service.*
   A sub-menu appears.
4. Under *Service,* select *EMS Shifts.*
   The *EMS Shift Setup* page appears.



5. To edit an existing shift, click the corresponding *edit* button.
   OR
   To add a new shift, click *Add New Shift.*

The *EMS Shift Setup* page appears.



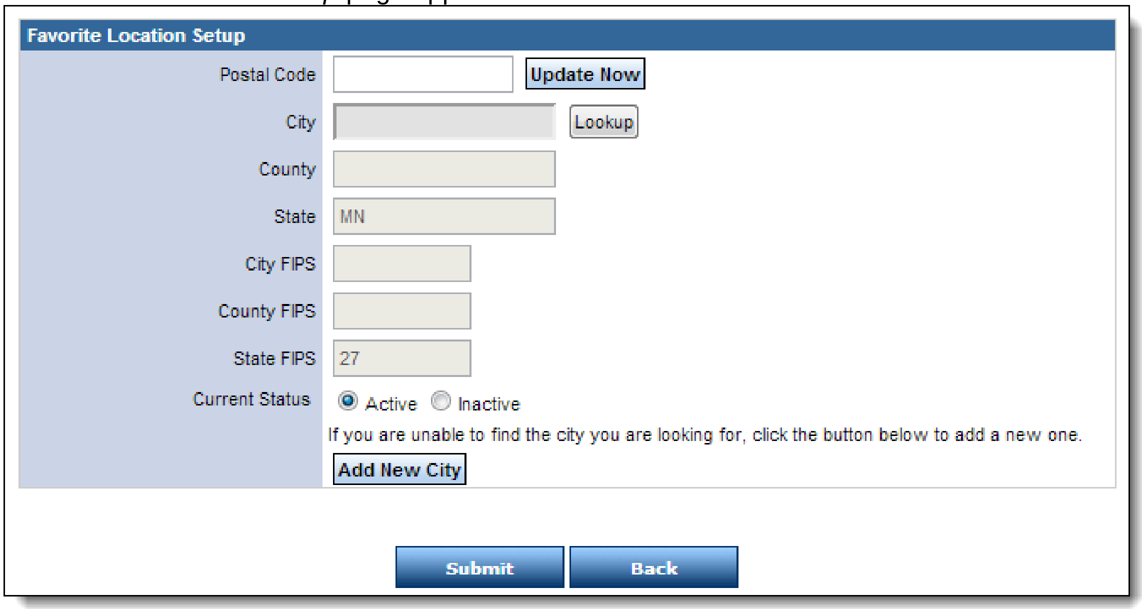
6. In the *Shift* text box, type the name of the shift.
7. In the *Description* text box, type any additional information about the shift.
8. In the *Current Status* section, to mark this shift as currently available for use in the system, select *Active.*
   To save this shift for reference in the system but not make it available for use, in the *Current Status* section, select *Inactive.*
9. When finished, click *Submit.*

4.5 Setting Up Favorite Locations

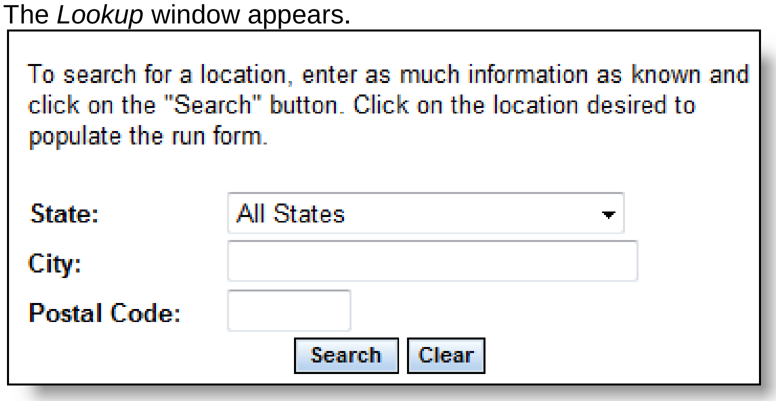
Favorite locations allow users to select a city from a list and automatically complete the county, state and postal code information in a run form. If users choose to look up a location, favorite locations will appear at the top of the list for easy entry.

1. In the Web-based system, from the top left, click *My Service.*
2. Select the *Setup* tab.
3. Under the *Service Settings and Resources* section, select *Service.*
   A sub-menu appears.
4. Under *Service,* select *Favorite Locations.*
   The *Favorite Location Setup* page appears.

5. Click *Add New Favorite Location.*
   The *Favorite Location Setup* page appears.



6. In the *Postal Code* text box, type the zip code for the desired location.
7. To enter the remaining information, automatically based on the most commonly entered information for this zip code, select the *Check to populate City, County, State from Postal Code* checkbox.
   OR
   To enter the remaining information by searching for information related to a zip code,
   a. Click *Lookup.*
      The *Lookup* window appears.



   b. Using the provided fields, enter as much information as is known about the desired location.
   c. Click *Search.*
      A list of matching locations appears.
   d. Click the desired location.
      The fields are populated with the selected information.
8. In the *Current Status* section, select whether the location should currently be active or inactive.
   NOTE: Only administrators can re-activate an inactive record.
9. Click *Submit.*
   The location record is saved.

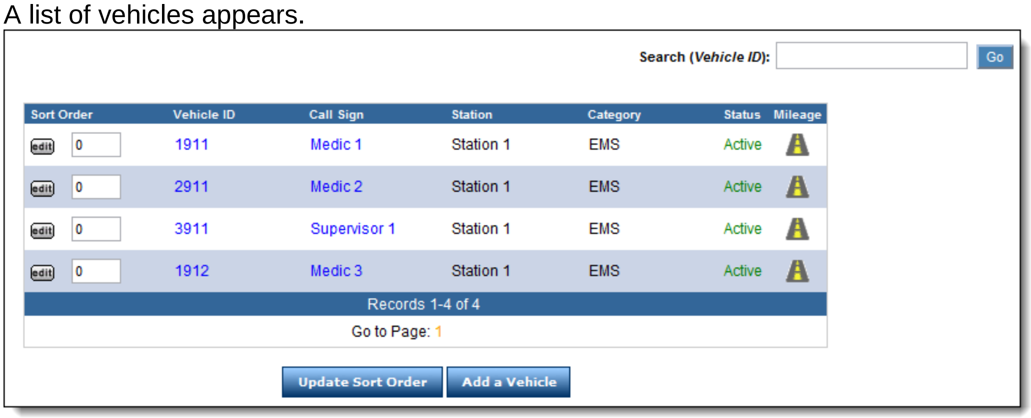
4.6 Working with Vehicle Information

Run forms can document the vehicles that responded to an incident if the vehicle information has been added to the system. Depending on permissions, most system users will be able to view vehicle information, but only administrators will be able to change vehicle information or add or delete a vehicle. Vehicle profiles can also keep track of a vehicle's mileage for the year.

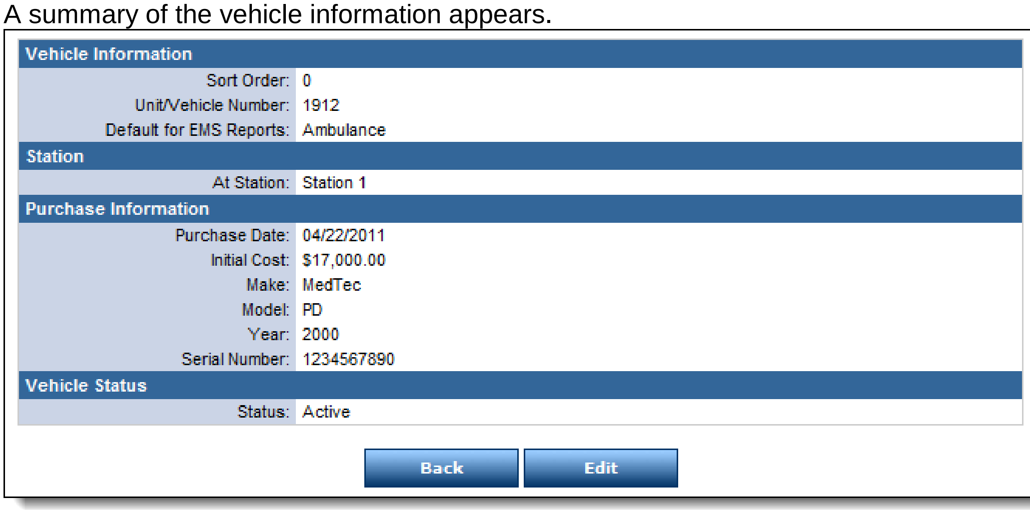
Viewing and Editing Vehicle Information

Administrators can view existing vehicle information and, if necessary, change the information for a particular vehicle.

1. In your Web-based system, from the top left, click *My Service.*
2. Select the *Setup* tab.
3. Under the *Service Settings and Resources* section, select *Service.*
   A sub-menu appears.
4. Under *Service,* select *Vehicles.*
   A list of vehicles appears.



5. To view or edit information for a particular vehicle, click the vehicle ID, call sign or *Edit* button for that vehicle.
   A summary of the vehicle information appears.

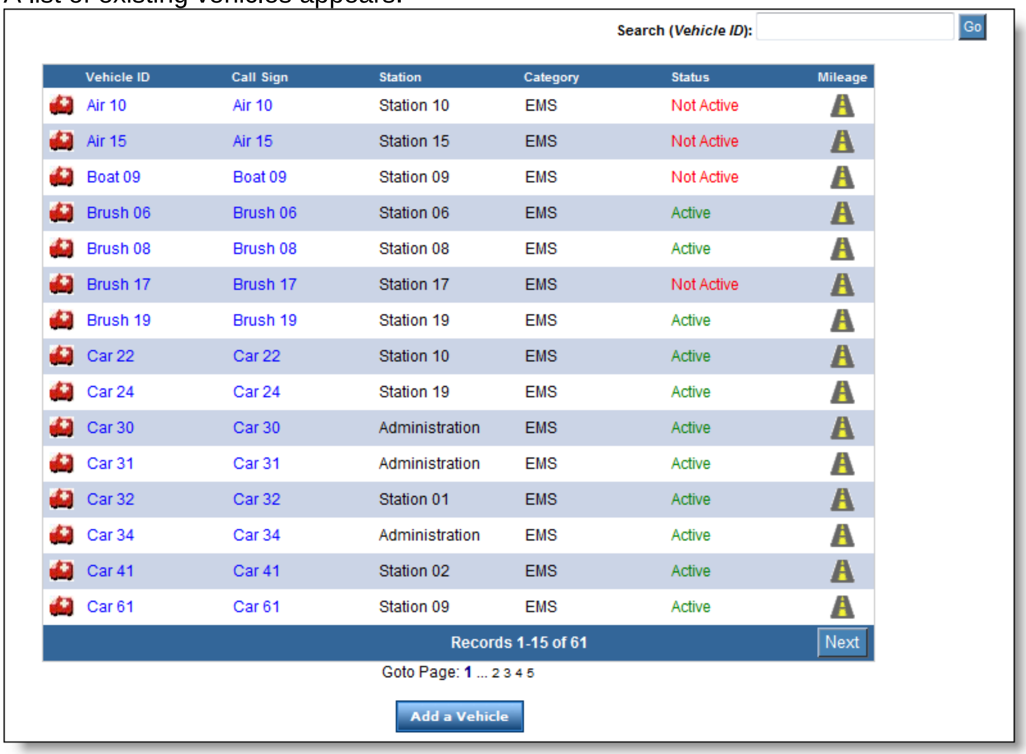


6. **OPTIONAL:** To edit the vehicle information,
   a. Click *Edit.*
   b. Using the provided fields, enter any new or different information desired.
   c. When finished, click *OK.*

Adding a New Vehicle

Only administrators can add a new vehicle to the system.

1. In your Web-based system, from the top left, click *My Service.*
2. Select the *Setup* tab*.*
3. Under the *Service Settings and Resources* section, select *Service.*
   A sub-menu appears.
4. Under *Service,* select *Vehicles.*
   A list of existing vehicles appears.



Search (*Vehicle ID*): Go

Vehicle ID	Call Sign	Station	Category	Status	Mileage
Air 10	Air 10	Station 10	EMS	Not Active	
Air 15	Air 15	Station 15	EMS	Not Active	
Boat 09	Boat 09	Station 09	EMS	Not Active	
Brush 06	Brush 06	Station 06	EMS	Active	
Brush 08	Brush 08	Station 08	EMS	Active	
Brush 17	Brush 17	Station 17	EMS	Not Active	
Brush 19	Brush 19	Station 19	EMS	Active	
Car 22	Car 22	Station 10	EMS	Active	
Car 24	Car 24	Station 19	EMS	Active	
Car 30	Car 30	Administration	EMS	Active	
Car 31	Car 31	Administration	EMS	Active	
Car 32	Car 32	Station 01	EMS	Active	
Car 34	Car 34	Administration	EMS	Active	
Car 41	Car 41	Station 02	EMS	Active	
Car 61	Car 61	Station 09	EMS	Active	

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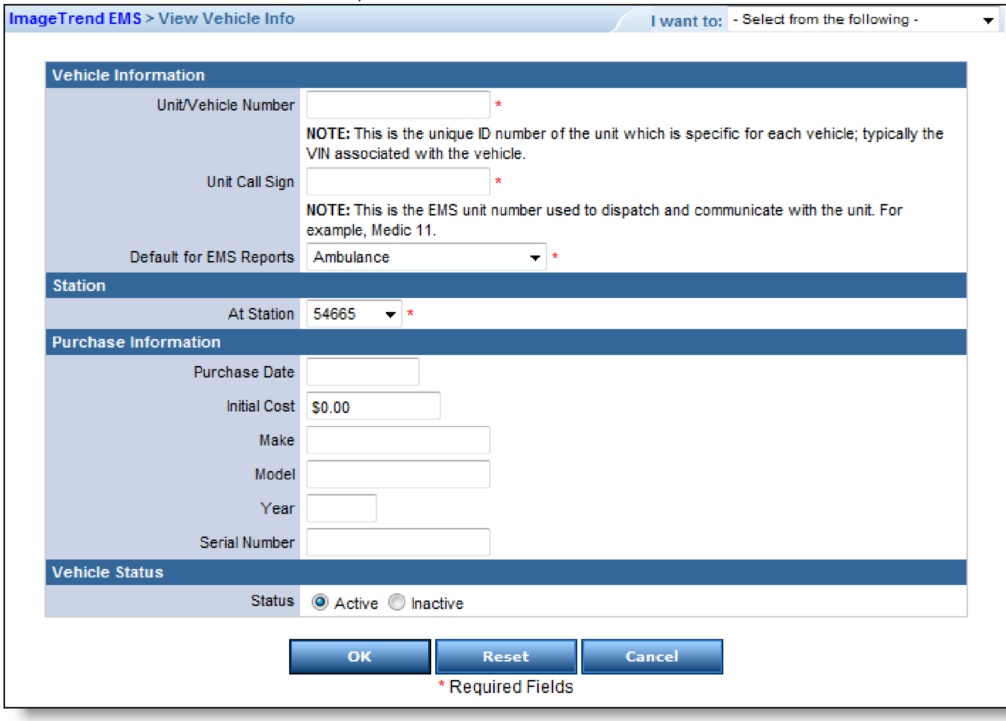
Goto Page: **1** ... 2 3 4 5

Add a Vehicle

5. From below the list of stations, click *Add a Vehicle.*



6. Using the provided fields, enter all desired information for the vehicle.
   NOTE: Be sure to enter at least the vehicle's station, the unit number and call sign and the default vehicle type of EMS reports, and to mark the vehicle as active or inactive. Active vehicles can be worked with in the system, while inactive vehicles will have their information stored in the list of vehicles but will not appear anywhere else in the system.
7. When finished, to save the new vehicle in the system, click *OK.*
   To clear all fields and start over, click *Reset.*
   To return to the list of vehicles without saving the new vehicle, click *Cancel.*

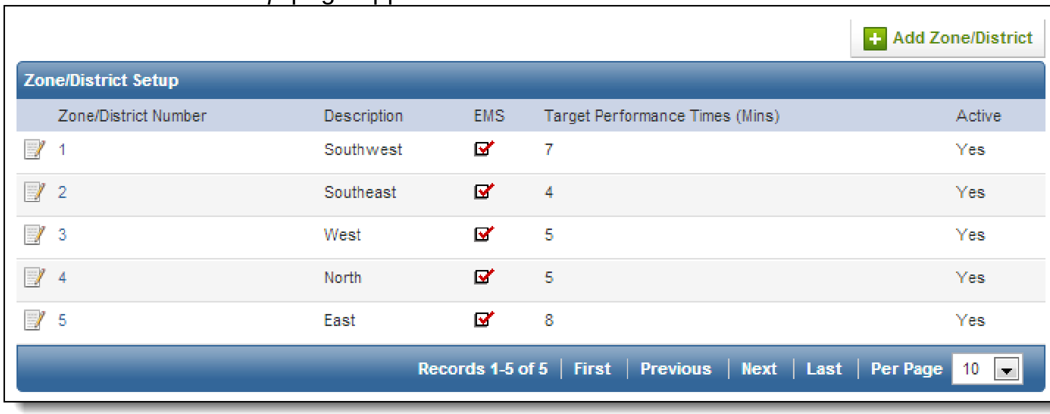
4.7 Working with Zones or Districts

Administrators can add or edit zone or district information and target performance time for use in run forms.

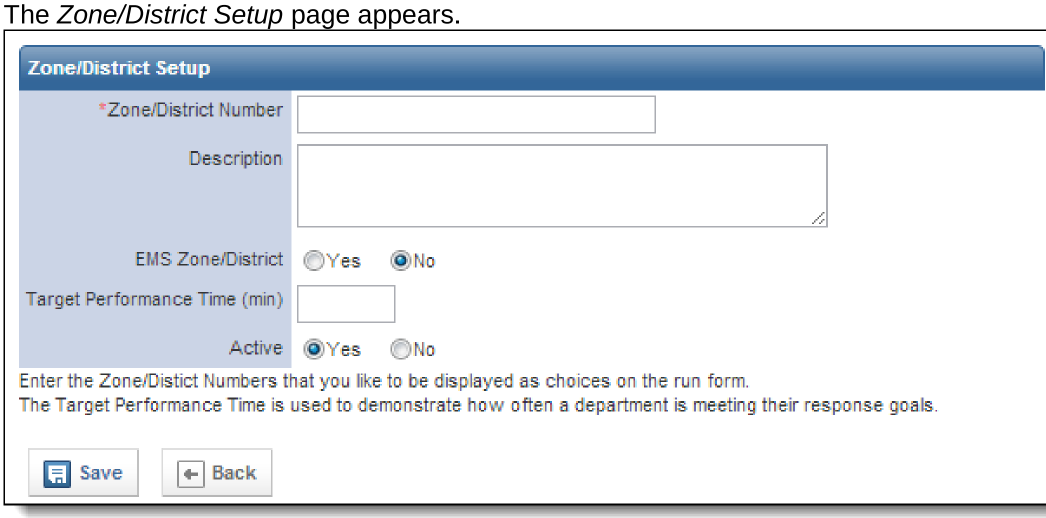
Adding a Zone or District Record

1. In the Web-based system, from the top left, click *My Service.*
2. Select the *Setup* tab.
3. Under the *Service Settings and Resources* section, select *Service.*
   A sub-menu appears.

4. Under *Service,* select *Zones/Districts.*
   The *Zone/District Setup* page appears.



5. Click *Add Zone/District.*
   The *Zone/District Setup* page appears.

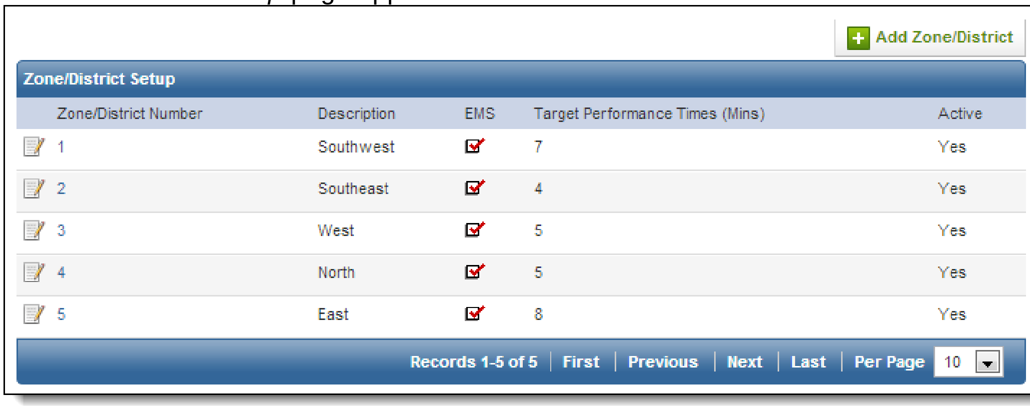


6. In the provided fields, enter information for the zone or district and the type of zone/district it is (e.g., fire or EMS).
7. When finished, click *OK.*
   The record is saved.

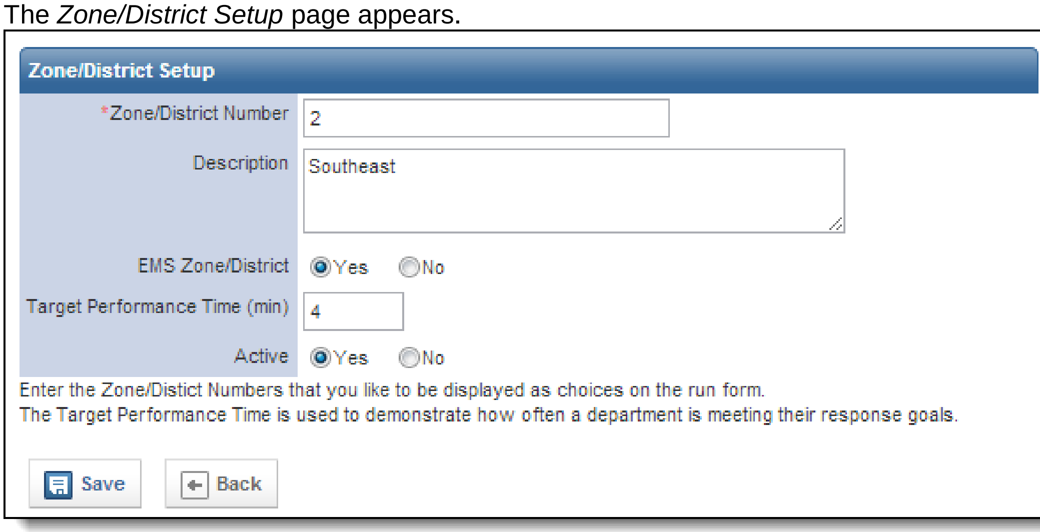
Editing a Zone or District Record

1. In the Web-based system, from the top left, click *My Service.*
2. Select the *Setup* tab.
3. Under the *Service Settings and Resources* section, select *Service.*
   A sub-menu appears.

4. Under *Service,* select *Zones/Districts.*
   The *Zone/District Setup* page appears.



5. For the desired zone or district, click *edit.*
   The *Zone/District Setup* page appears.



6. Using the provided fields, make any desired changes.
7. When finished, click *Submit.*

4.8 Setting Up AMA Questions

You can choose to set up extra questions to be displayed in the *Against Medical Advice* signature panel for patients. These questions can help you collect more detailed information than is collected by default. When you set up questions, make sure they are worded so that they can be answered with the default answers of either *"I agree/I disagree/ N/A*," or "*Yes/No.*"

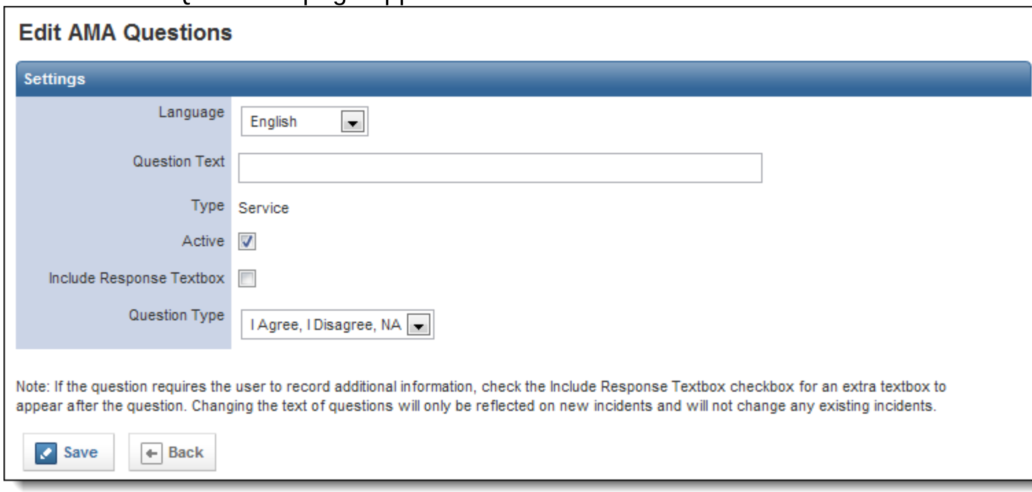
After you set up AMA questions you must also edit the dynamic run form to enable the questions to appear.

Adding an AMA Question

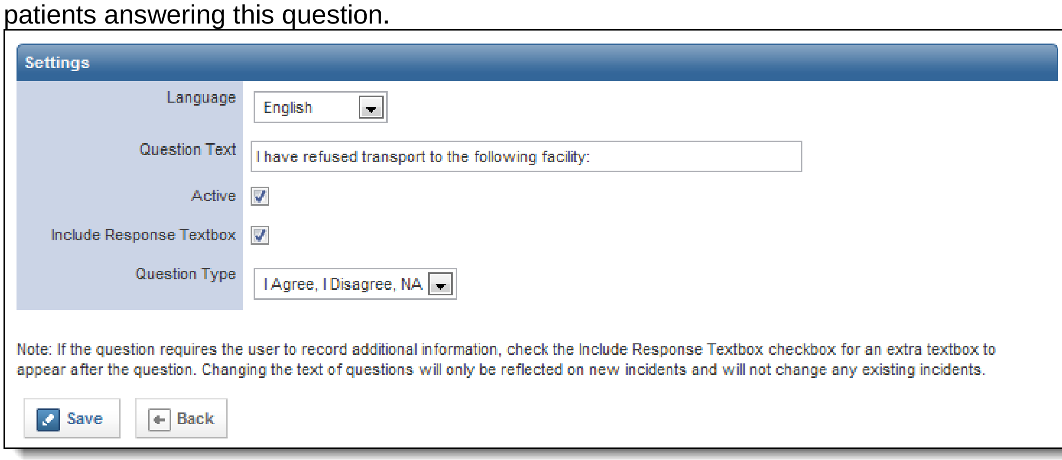
You can set up as many AMA questions as you would like.

1. In the Web-based system, from the top left, click *My Service.*
2. Select the *Setup* tab*.*
3. Under the *Run Forms* section, select *EMS Form Resources.*
   A sub-menu appears.

4. Under *EMS Form Resources,* select *Custom AMA Questions.*
   The *Manage AMA Questions* page appears.
5. Click *Add Question.*
   The *Edit AMA Questions* page appears.



6. From the *Language* drop down menu, select the language that this question will be in.
7. In the *Question Text* text box, type the question.
   HINT: The question should be answerable by either *"I agree/I disagree/ N/A*," or "*Yes/No*," as these are the options that will be available.
8. In the *Active* section, select whether this question should be active and available for run forms, or inactive and stored in the system for reference.
9. In the *Include Response Textbox* section, select the checkbox to include a text box with this question that can collect additional information.
10. From the *Question Type* drop down menu, select which answers should be available to patients answering this question.



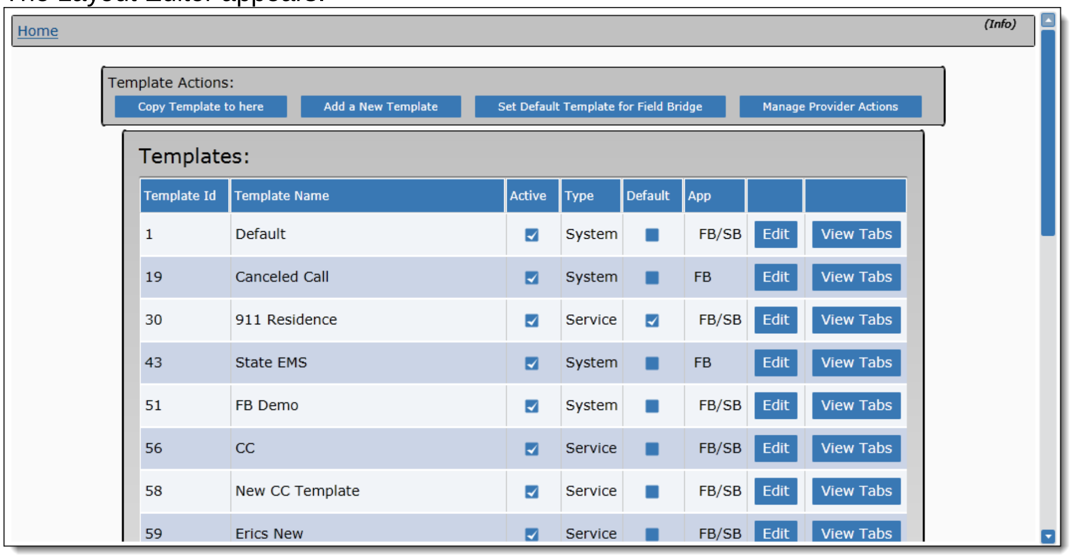
11. When finished, click *Save.*
    The question is added and will be displayed if the appropriate section is available on the run form.

Editing the Run Form for AMA Questions

If you want to include AMA questions on your run form, you will need to add a new control to the run form.

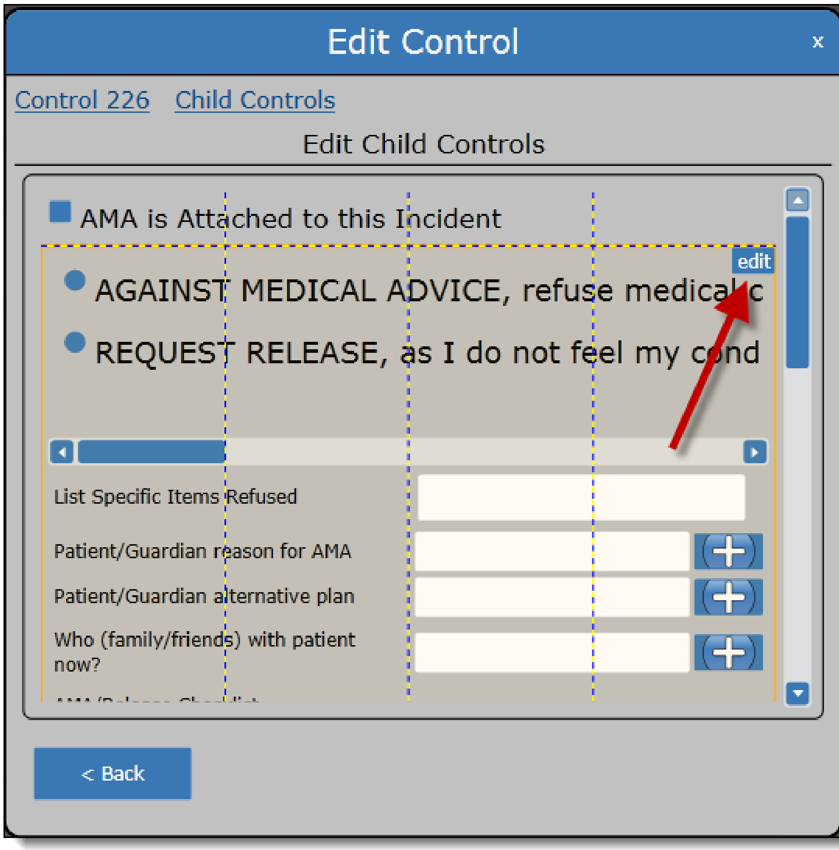
1. In the Web-based system, from the top left, click *My Service.*
2. Select the *Setup* tab.

3. Under the *Run Forms* section, select *EMS Form Configuration.*
   A sub-menu appears.
4. Under *EMS Form Configuration,* select *Layout Editor.*
   The Layout Editor appears.



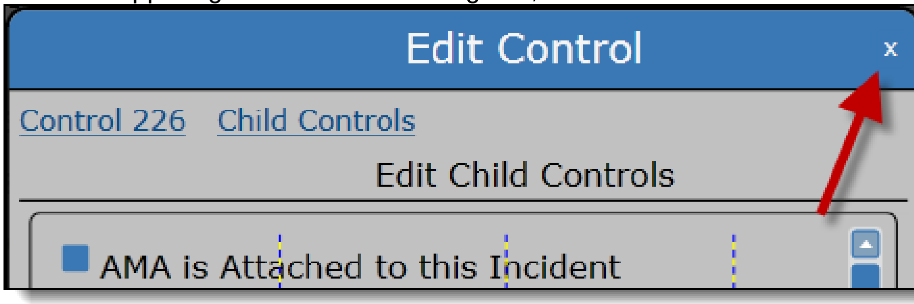
5. Locate the template you want to edit.
   HINT: It might be beneficial to begin with a copy of the template that you want to edit, if you are editing a template that is in use. This will ensure that providers are still working with an appropriate run form while you are working on it, as well as giving you a backup if the run form does not turn out the way you want.
6. For the appropriate run form, click *View Tabs.*
   A list of the run forms tabs appears, with the first tab's information displayed.
7. Click the tab that contains your signature panels.
   HINT: This is usually the *Signatures* tab, but your service may have assigned a different name to the tab in your template.
8. Locate the AMA parent control.
   OR
   If the AMA control is not yet set up on the run form you are working with,
   a. Locate or add a new panel for the AMA section.
   b. Click *Add Control.*
      The *Add Control* dialog box appears.
   c. Search for the AMA Parent control.
   d. Select the *AMA Parent Control* option.
   e. Click *View Selected Control.*
   f. Click *Add Control.*
      The field is added and you are returned to the run form template.
9. For the parent AMA control, click *Edit.*
   The *Edit Control* dialog box appears.
10. Click *View/Edit Child Controls* button.
    A preview of the control appears.
11. For the control including the current AMA question, click *Edit.*
    NOTE: There are several different controls contained within the AMA parent control. When you click the correct one, the header in the dialog box should refresh to say

Control ID: 593.



12. Click *View/Edit Child Controls.*
    The dialog box is refreshed to display the *Edit Child Controls* page.
13. On the empty space where you would like to include the AMA questions, click *Add Control.*
    The dialog box refreshes to display the *Edit Control* options.
14. Use the advanced search options to search for control ID 1266.
15. Select the control with ID 1266.
16. Click *View Selected Control.*
    A preview of the control appears.
17. Click *Add Control.*
    The control is added and you are returned to the *Edit Child Controls* page.
18. **OPTIONAL:** To change the number of rows or columns that this control spans,
    a. For the new control, click *Edit.*
       The *Control ID: 1266* dialog box appears.
    b. Use the *Row Span* and/or *Column Span* options to select the size of the control.
    c. When finished, click *Save & Back.*
       The changes are made.
19. Click *Back.*
    The *Control ID: 593* page is displayed.
20. Click *Save & Back.*

21. From the upper right corner of the dialog box, click the *Close* icon.

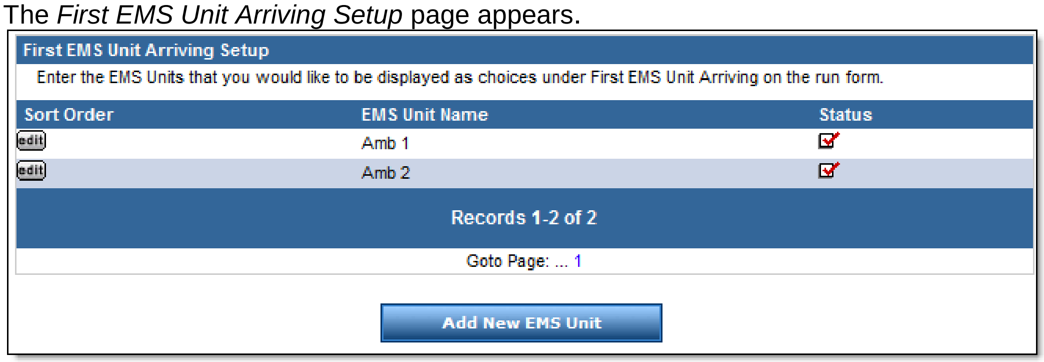


The changes are saved.

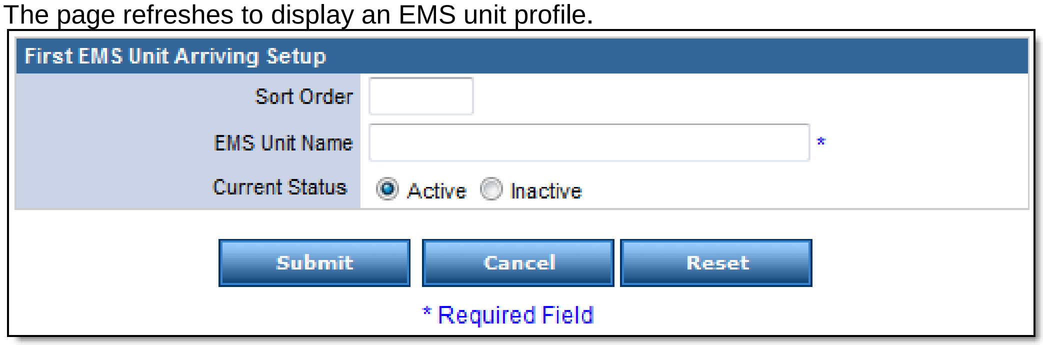
4.9 Setting Up the First EMS Unit Responding

If you want to include a field on your run form for the first EMS units that arrives you can set up the values for that field here. (These values should be your own department's unit numbers.) This field will not be included in your run form automatically; you will need to add it in the run form editor.

1. In the Web-based system, from the top left, click *My Service.*
2. Select the *Setup* tab.
3. Under the *Run Forms* section, select *EMS Form Resources.*
   A sub-menu appears.
4. Under *EMS Form Resources,* select *First EMS Unit Arriving.*
   The *First EMS Unit Arriving Setup* page appears.



5. To edit an existing EMS unit, click the corresponding *edit* button.
   OR
   To add a new EMS unit, click *Add New EMS Unit.*
   The page refreshes to display an EMS unit profile.



6. **OPTIONAL:** To assign this EMS unit to a particular order in the list of EMS units, in the *Sort Order* text box, type a number corresponding to this unit's order (e.g., 1 for first).
7. In the *EMS Unit Name* text box, type a name for this EMS unit.
8. In the *Current Status* section, to mark this unit as currently available for use in the system, select *Active.*

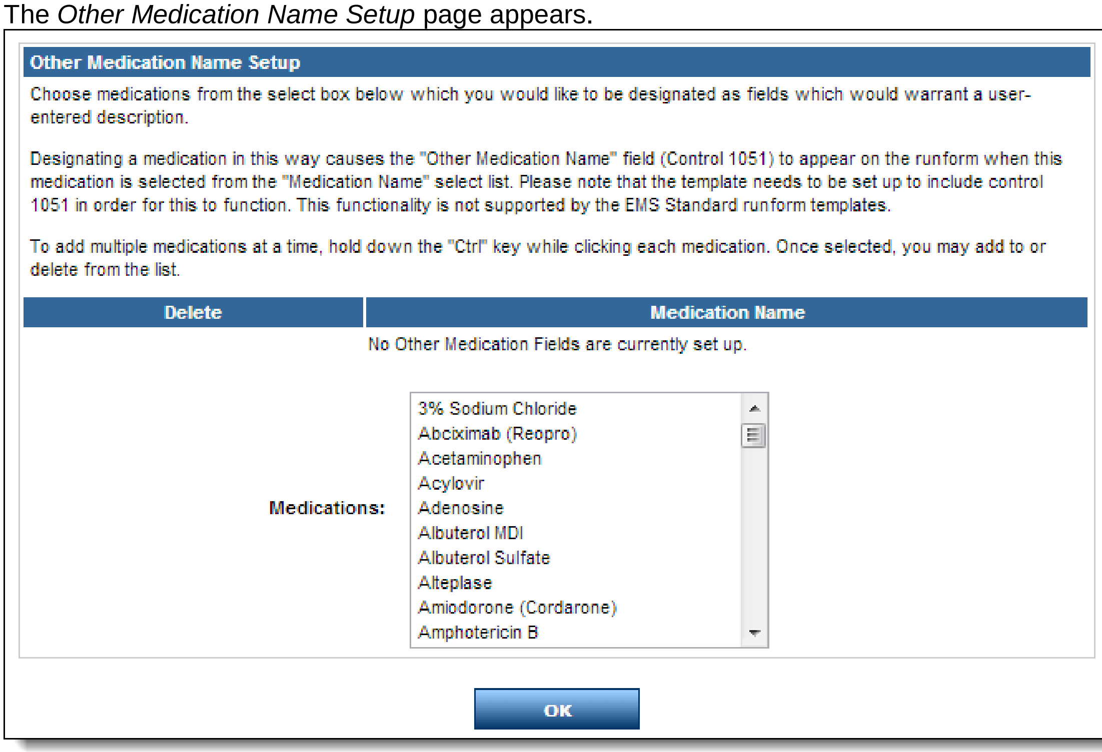
To save this unit for reference in the system but not make it available for use, in the *Current Status* section, select *Inactive.*

9. When finished, click *Submit.*

4.10 Setting Up Medications Requiring a User Description

If your run forms include the *Other Medication Name* control (control #1051), you can set up the list of medications that will cause the *Other Medication Name* field to appear and prompt the user for a description. This option is only available if you use a dynamic run form template and if the *Other Medication Name* field is available on your template.

1. In the Web-based system, from the top left, click *My Service.*
2. Select the *Setup* tab*.*
3. Under the *Run Forms* section, select *EMS Form Resources.*
   A sub-menu appears.
4. Under *EMS Form Resources,* select *Other Medications.*
   The *Other Medication Name Setup* page appears.



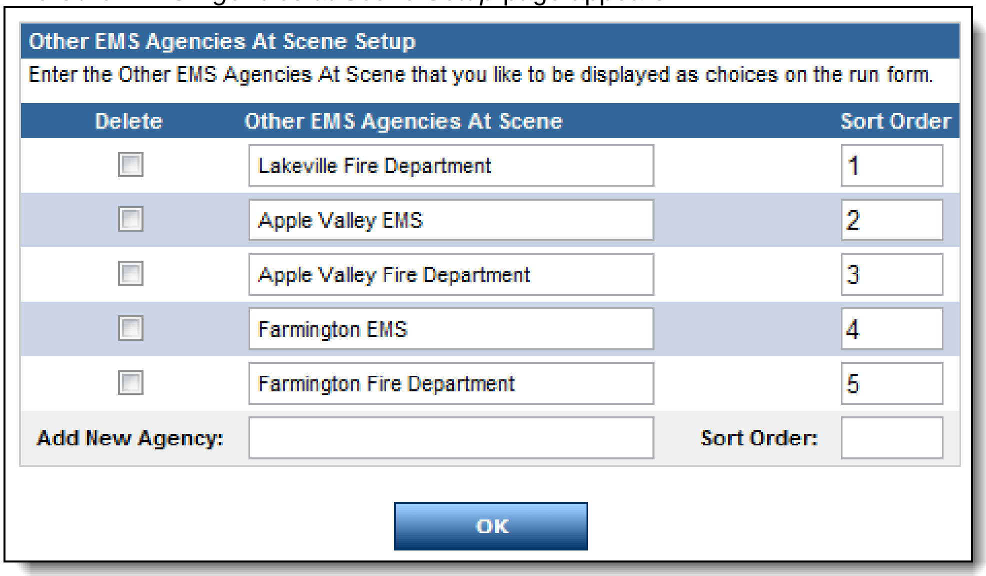
5. In the *Medications* list, select the medication(s) that should cause the *Other Medication Name* field to appear.
   HINT: To select multiple options at the same time, press and hold the *Ctrl* key while clicking each desired option.
6. Click *OK.*
   The medications are added to the list.
7. Repeat steps 5–6 until all desired medications are added to the list.

4.11 Setting Up Other EMS Agencies at the Scene

You can set up names of any other EMS agencies in the area that might respond to a scene, which can then be selected and documented on run forms.

1. From the top left, click *My Service.*

2. Select the *Setup* tab.
3. Under the *Run Forms* section, select *EMS Form Resources.*
   A sub-menu appears.
4. Under *EMS Form Resources,* select *Other EMS Agencies at Scene.*
   The *Other EMS Agencies at Scene Setup* page appears.


Other EMS Agencies At Scene Setup

Enter the Other EMS Agencies At Scene that you like to be displayed as choices on the run form.

Delete	Other EMS Agencies At Scene	Sort Order
☐	Lakeville Fire Department	1
☐	Apple Valley EMS	2
☐	Apple Valley Fire Department	3
☐	Farmington EMS	4
☐	Farmington Fire Department	5
Add New Agency:		Sort Order:

OK

5. To add a new agency name to the list,
   a. In the *Add New Agency* text box at the bottom of the page, type the name of the agency.
   b. **OPTIONAL:** To specify this agency's position in the list of other agencies, in the *Sort Order* text box, type a number corresponding to the desired position (e.g., type 1 for first).
   c. Click *OK.*
      The agency is added to the list and a new blank row appears.
6. To make changes to any existing EMS agency names,
   a. Make the desired changes.
   b. Click *OK.*
7. To delete an agency that is currently in the list,
   a. Select the corresponding *Delete* checkbox.
   b. Click *OK.*
      The agency is removed from the list and will no longer be available on run forms.

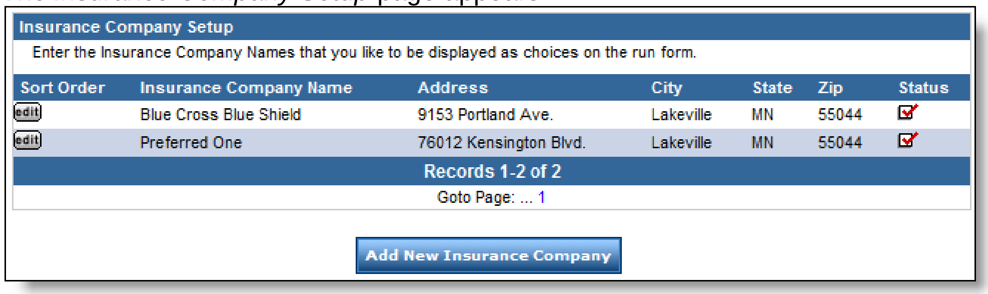
4.12 Setting Up Insurance Companies

Insurance company records can be added to a run form for easy selection.

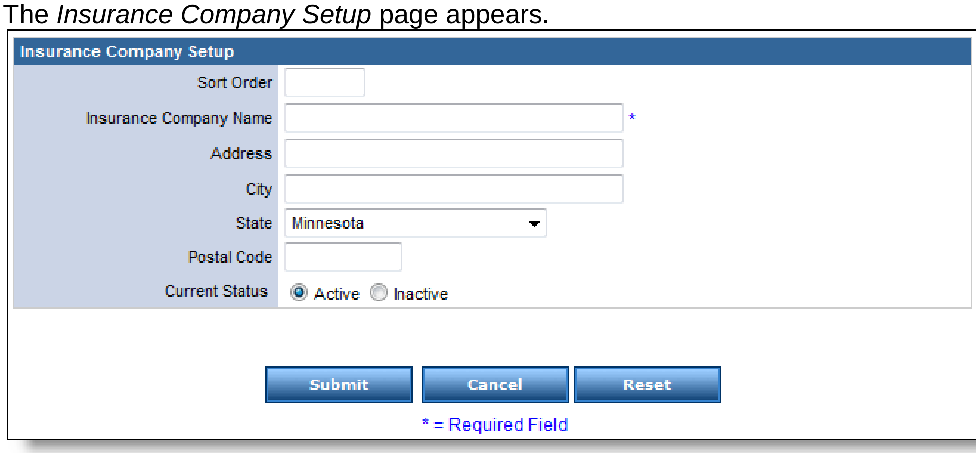
Adding an Insurance Company Record

1. In the Web-based system, from the top left, click *My Service.*
2. Select the *Setup* tab.
3. Under the *Run Forms* section, select *EMS Form Resources.*
   A sub-menu appears.

4. Under *EMS Form Resources,* select *Insurance Companies.*
   The *Insurance Company Setup* page appears.



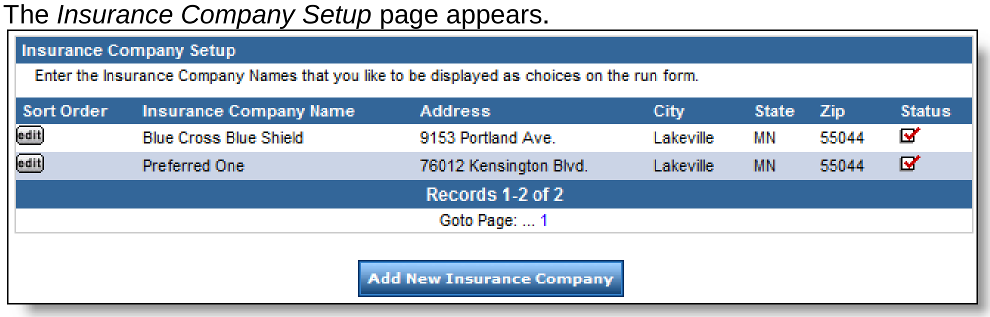
5. Click *Add New Insurance Company.*
   The *Insurance Company Setup* page appears.



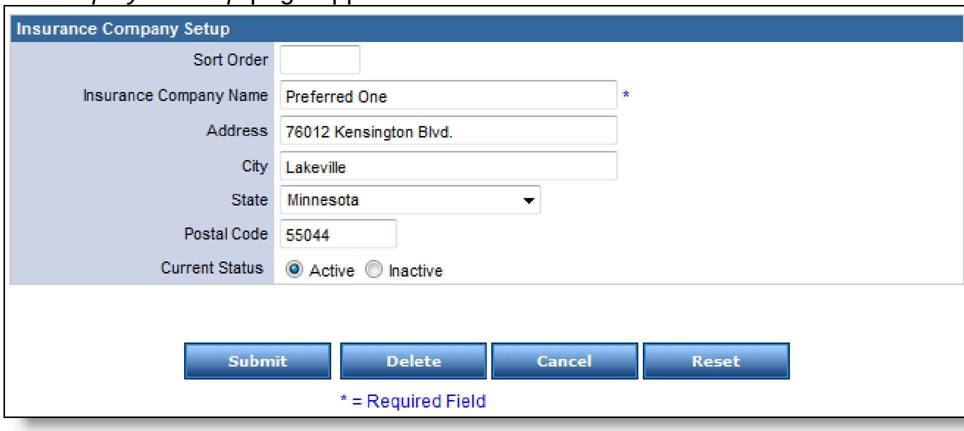
6. In the provided fields, enter the company's information.
7. When finished, click *Submit.*
   The insurance company record is saved.

Editing an Insurance Company Record

1. In the Web-based system, from the top left, click *My Service.*
2. Select the *Setup* tab.
3. Under the *Run Forms* section, select *EMS Form Resources.*
   A sub-menu appears.
4. Under *EMS Form Resources,* select *Insurance Companies.*
   The *Insurance Company Setup* page appears.



5. For the desired insurance company, click *edit.*
   The *Employer Setup* page appears.

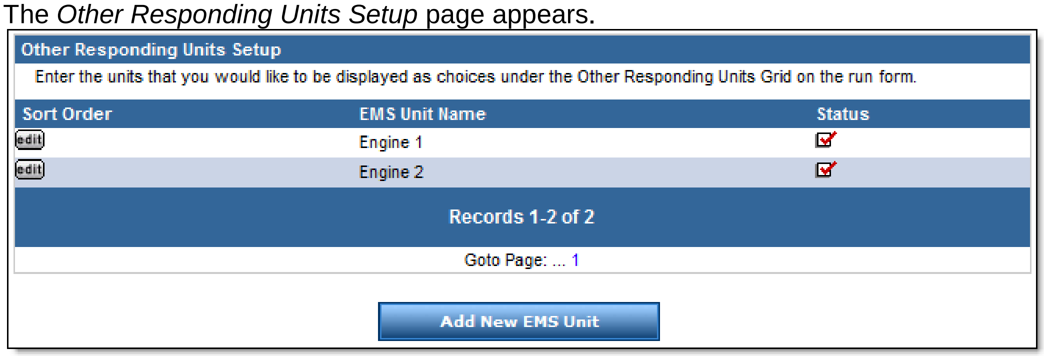


6. Using the provided fields, make any desired changes.
7. When finished, click *Submit.*

4.13 Setting Up Other Responding Units

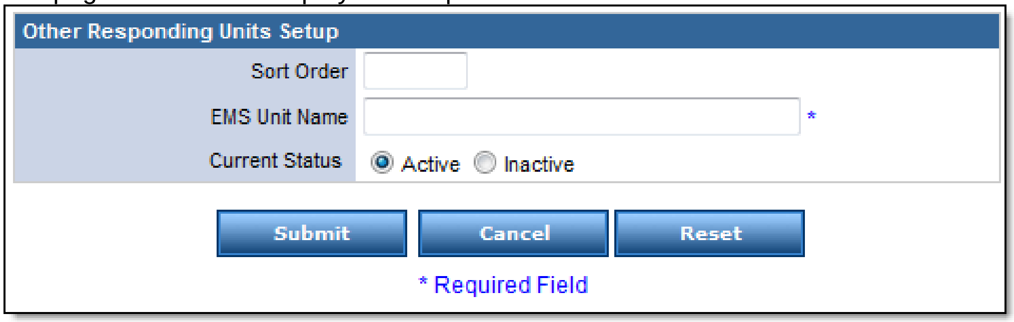
If you want to include a field on your run form for other units that respond to a call (e.g., fire departments, police departments, utility companies), you can set up the values for that field here. This field will not be included in your run form automatically; you will need to add it in the run form editor.

1. In the Web-based system, from the top left, click *My Service.*
2. Select the *Setup* tab.
3. Under the *Run Forms* section, select *EMS Form Resources.*
   A sub-menu appears.
4. Under *EMS Form Resources,* select *Other Responding Units.*
   The *Other Responding Units Setup* page appears.



5. To edit an existing unit, click the corresponding *edit* button.
   OR
   To add a new unit, click *Add New EMS Unit.*

The page refreshes to display an unit profile.

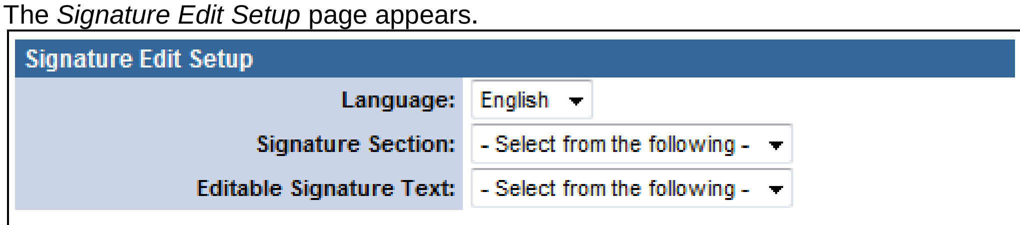


6. **OPTIONAL:** To assign this unit to a particular order in the list of units, in the *Sort Order* text box, type a number corresponding to this unit's order (e.g., 1 for first).
7. In the *EMS Unit Name* text box, type a name for this unit.
8. In the *Current Status* section, to mark this unit as currently available for use in the system, select *Active.*
   To save this unit for reference in the system but not make it available for use, in the *Current Status* section, select *Inactive.*
9. When finished, click *Submit.*

4.14 Customizing Signature Consent Text

If you would like to edit the consent text included for signatures, you can do so. If you change the consent text, previous run forms will not be affected by the changes.

1. In the Web-based system, from the top left, click *My Service.*
2. Select the *Setup* tab.
3. Under the *Run Forms* section, select *EMS Form Resources.*
   A sub-menu appears.
4. Under *EMS Form Resources,* select *Signatures.*
   If no customized signatures are set up, a warning appears.
5. Click *Yes.*
   The *Signature Edit Setup* page appears.

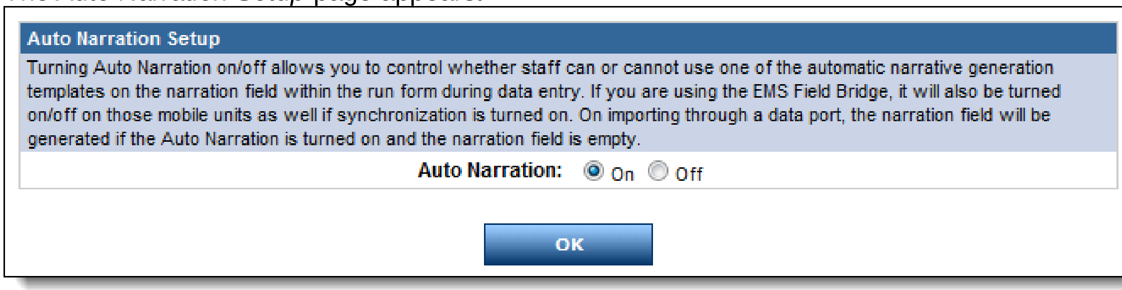


6. Using the drop down menus, select the consent text you would like to edit.
   A preview of the existing consent text appears.
7. Click *Edit.*
   The consent text becomes editable.
8. Make any desired changes.
   OR
   To return edited consent text to the system default text, in the *Set signature text to system default* section, click *Yes.*
9. Click *Submit.*

4.15 Enabling the Auto Narration Feature

You can choose whether or not to enable the auto narration feature, which will enter narrative text into a run form based on the information that is already in the run form. If auto narration is enabled, patient care providers can select the type of narrative to be generated and in some cases will be required to answer additional questions, after which the narrative is generated.

1. From the top left, click *My Service.*
2. Select the *Setup* tab.
3. Under the *Run Forms* section, select *EMS Form Configuration.*
   A sub-menu appears.
4. Under *EMS Form Configuration,* select *Auto-Narration.*
   The *Auto Narration Setup* page appears.

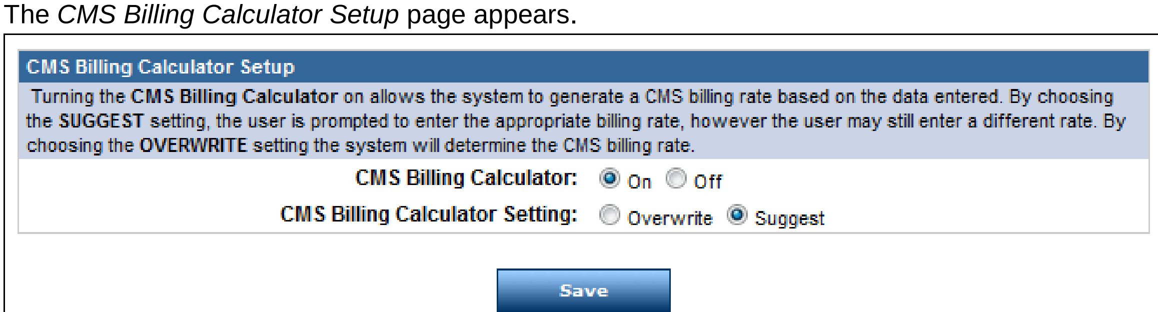


5. To enable automatic narrative generation, select *On.*
   OR
   To prevent automatic narratives from being generated, select *Off.*
6. Click *OK.*
   The setting is saved.

4.16 Enabling the CMS Billing Calculator

If enabled, the CMS Billing Calculator automatically generates a suggested CMS billing rate. You can choose whether to enable the CMS Billing Calculator, as well as whether the calculated billing rate should be changeable by the provider entering the run form or not.

1. In the Web-based system, from the top left, click *My Service* or *My Fire Department.*
2. Select the *Setup* tab.
3. Under the *Run Forms* section, select *EMS Form Configuration.*
   A sub-menu appears.
4. Under *EMS Form Configuration,* select *CMS Billing Calculator.*
   The *CMS Billing Calculator Setup* page appears.



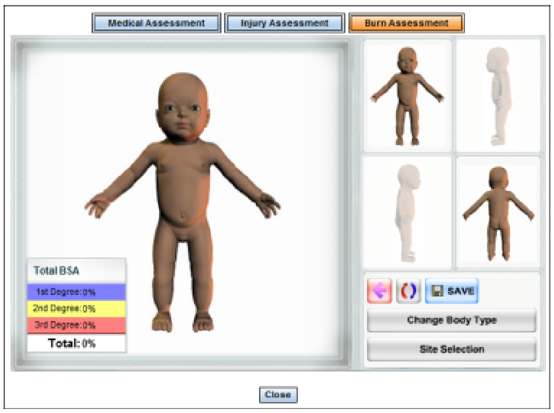
5. To enable the CMS Billing Calculator, select *On.*
   OR
   To prevent the CMS Billing Calculator from providing a billing rate, select *Off.*
6. If the CMS Billing Calculator is enabled, select whether the calculated rate should be changeable by the provider filling out the run form (*Suggest*) or automatically applied and unchangeable (*Overwrite*).

7. When finished, click *Save.*
   The settings are saved.

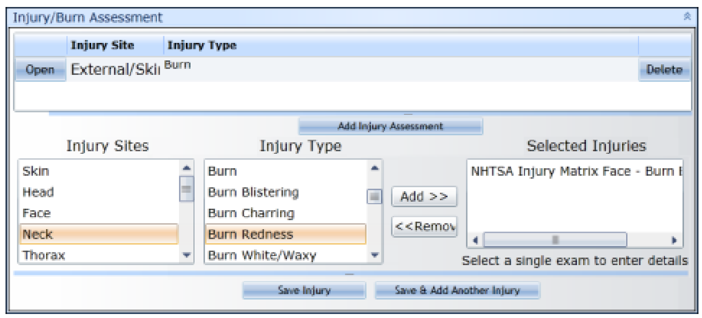
4.17 Enabling the Interactive Physical Assessment

You can choose whether to enable the interactive physical assessment for your run forms. You may want to turn this off if your computers do not allow Flash or if you do not have a high bandwidth (128KB or greater) connection.

If the interactive physical assessment is enabled, providers will be able to work with an interactive physical image to enter medical and injury assessments. If the interactive physical assessment is not enabled, providers will work with a collection of fields similar to the rest of the run form to enter these assessments. However, if you turn off the interactive assessment, you must have the non-interactive assessment control included in your run forms.
EXAMPLE:

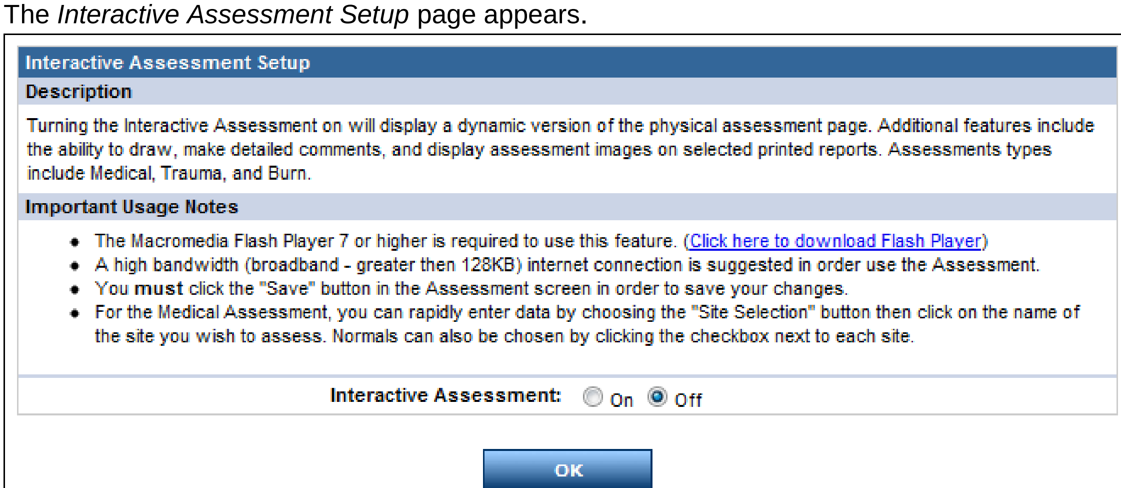


Interactive Assessment



Non-Interactive Assessment

1. In the Web-based system, from the top left, click *My Service* or *My Fire Department.*
2. Select the *Setup* tab.
3. Under the *Run Forms* section, select *EMS Form Configuration.*
   A sub-menu appears.
4. Under *EMS Form Configuration,* select *Interactive Physical Assessment.*
   The *Interactive Assessment Setup* page appears.



Interactive Assessment Setup

Description

Turning the Interactive Assessment on will display a dynamic version of the physical assessment page. Additional features include the ability to draw, make detailed comments, and display assessment images on selected printed reports. Assessments types include Medical, Trauma, and Burn.

Important Usage Notes

- The Macromedia Flash Player 7 or higher is required to use this feature. (Click here to download Flash Player)
- A high bandwidth (broadband - greater then 128KB) internet connection is suggested in order use the Assessment.
- You **must** click the "Save" button in the Assessment screen in order to save your changes.
- For the Medical Assessment, you can rapidly enter data by choosing the "Site Selection" button then click on the name of the site you wish to assess. Normals can also be chosen by clicking the checkbox next to each site.

Interactive Assessment: ○ On ◉ Off

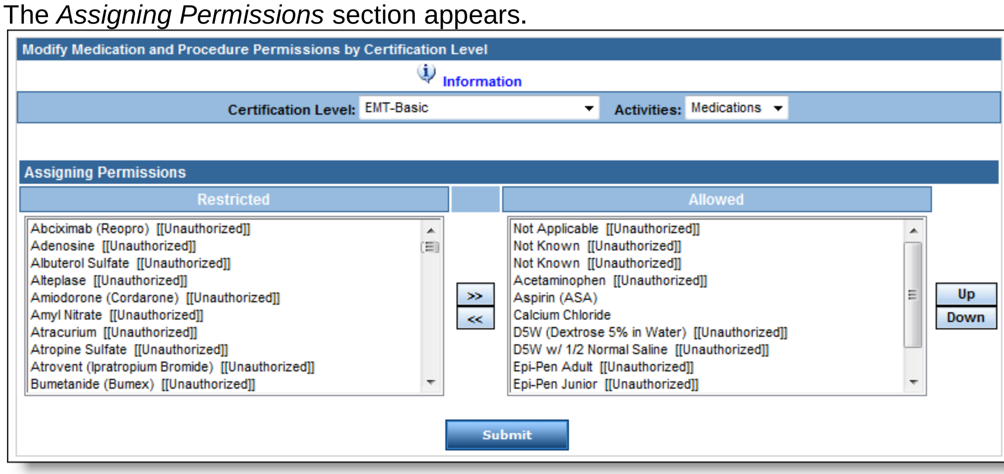
OK

5. To enable the interactive physical assessment, select *On.*
   OR
   To disable to interactive physical assessment, select *Off.*
6. When finished, click *OK.*
   The changes are applied.

4.18 Setting Up Medication and Procedure Permissions

Administrators can set which medications and procedures can be documented by personnel in each certification level. Procedures and medications that are not set for a certification level will not be available when staff members with this level are selected from the run form.

1. In the Web-based system, from the top left, click *My Service.*
2. Select the *Setup* tab.
3. Under the *Run Forms* section, select *EMS Form Configuration.*
   A sub-menu appears.
4. Under *EMS Form Resources,* select *Meds/Procs by Certification Level.*
   The *Modify Medication and Procedure Permissions by Certification Level* page appears.
5. From the *Certification Level* drop down menu, select the certification level for which to set permissions.
6. From the *Activities* drop down menu, select the type of activity for which to set up permissions.
   The *Assigning Permissions* section appears.



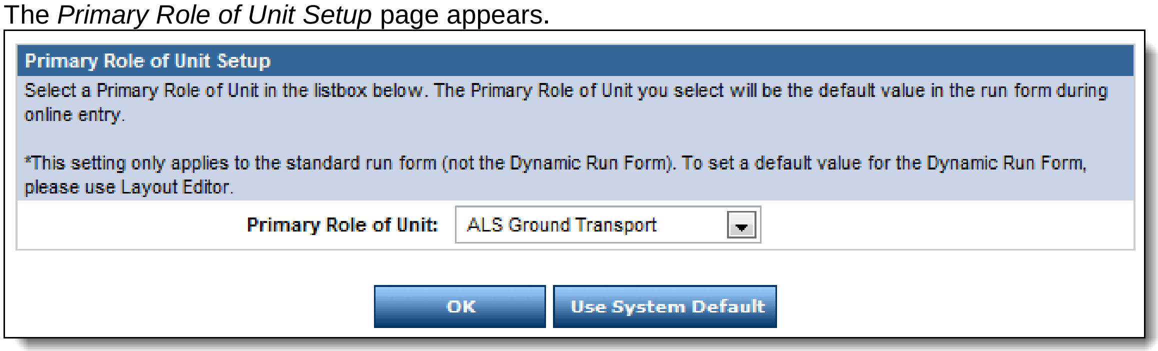
7. To add an activity to the allowed activities for the certification level,
   a. From the *Restricted* list, select the desired activity.
      HINT: To select multiple activities, press and hold *Ctrl* while clicking each desired activity. To select a range of activities, press and hold *Shift* while clicking the first and last activity in the range.
   b. Click *Add* >>.
      The activity is added to the *Allowed* list.
8. To remove an activity from the list of allowed activities for the certification level,
   a. From the *Allowed* list, select the desired activity.
      HINT: To select multiple activities, press and hold *Ctrl* while clicking each desired activity. To select a range of activities, press and hold *Shift* while clicking the first and last activity in the range.
   b. Click *Remove* <<.
9. To change the order of allowed activities,
   a. From the *Allowed* list, select the activity to move.
   b. Click the *Up* and/or *Down* buttons until the activity is in the desired place.
10. When finished with this level and type of activity, click *Submit.*

11. Repeat steps 5–10 until all certification levels and types of activities are set up.

4.19 Setting Up the Primary Role of Unit

You can set up the value that will be automatically entered for the role of a unit of standard run forms.

1. In the Web-based system, from the top left, click *My Service.*
2. Select the *Setup* tab.
3. Under the *Run Forms* section, select *EMS Form Configuration.*
   A sub-menu appears.
4. Under *EMS Form Resources,* select *Primary Role of Unit.*
   The *Primary Role of Unit Setup* page appears.

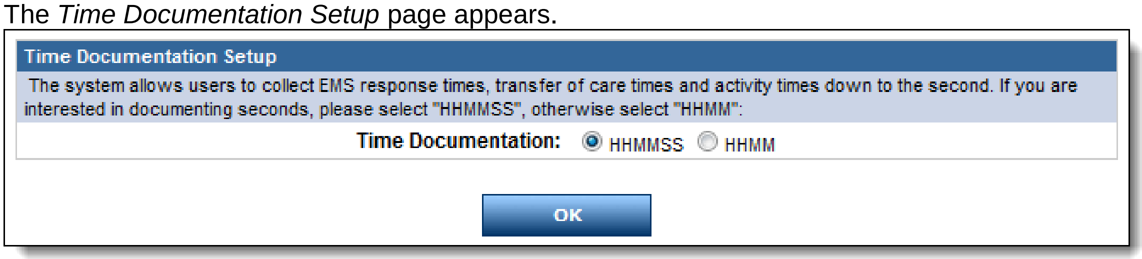


5. From the *Primary Role of Unit* drop down menu, select the desired default role.
6. Click *OK.*

4.20 Setting Up Time Formats

You can determine whether run forms should document all times (including response times, transfer of care times and activity times) down to the second or the minute.

1. From the top left, click *My Service.*
2. Select the *Setup* tab.
3. Under the *Run Forms* section, select *EMS Form Configuration.*
   A sub-menu appears.
4. Under *EMS Form Configuration,* click *Time Documentation.*
   The *Time Documentation Setup* page appears.

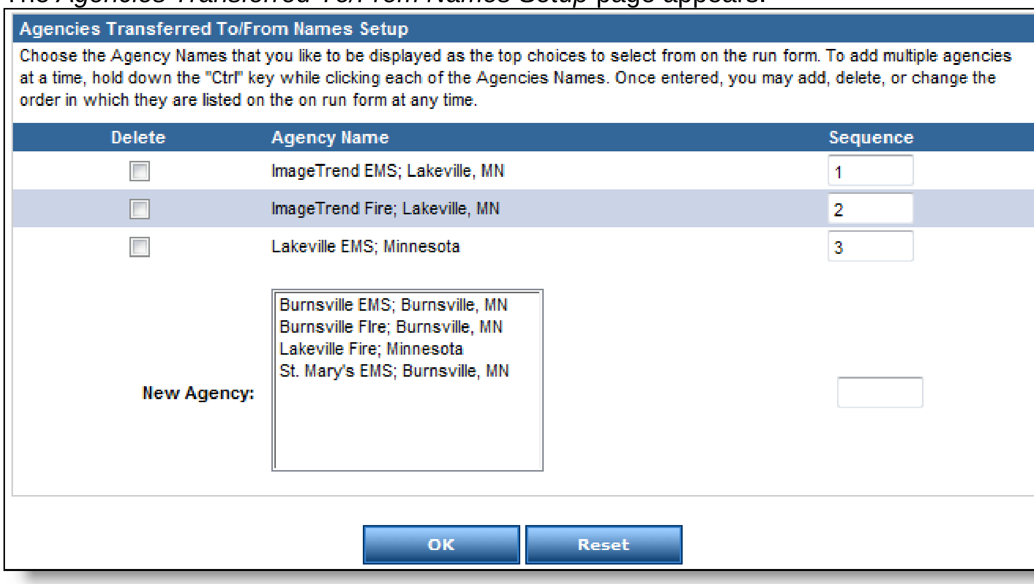


5. Select the desired time format.
6. Click *OK.*
   The format is saved.

4.21 Sorting Transferring Agencies

In this section, you can select which of the available agencies should be added to the run form for this service at the top of the list. Transferring agencies can then be quickly selected from run forms when necessary.

1. In the Web-based system, from the top left, click *My Service.*
2. Select the *Setup* tab.
3. Under the *Run Forms* section, select *Sorting Preferences.*
   A sub-menu appears.
4. Under *Sorting Preferences,* click *Agency Transfer/Transport.*
   The *Agencies Transferred To/From Names Setup* page appears.



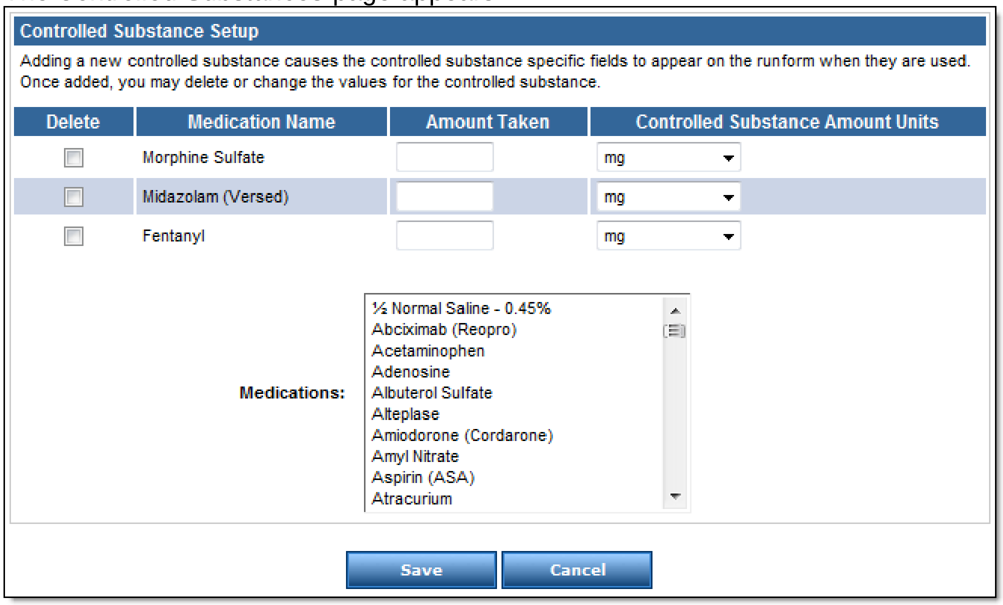
5. To add an agency to the list, from the *New Agency* section, click the agency to add.
6. Click *OK.*
7. To remove a agency from the list, from the list of agencies at the top of the page, select the desired *Delete* checkbox.
8. Click *OK.*
9. To re-order agencies, in the *Sequence* text boxes, type the number corresponding to the desired order.
   HINT: You only need to type in the desired numbers for the agencies you want to move. Other agencies will take their order in the list based on the new numbers.
10. When finished making changes, to save, click *OK.*

4.22 Sorting Controlled Substances

You can add controlled substances to appear on the run form. These will appear in the grid when you add a controlled substance signature.

1. In the Web-based system, from the top left, click *My Service.*
2. Select the *Setup* tab.
3. Under the *Run Forms* section, select *Sorting.*
   A sub-menu appears.

4. Under *Sorting,* click *Controlled Substances.*
   The *Controlled Substances* page appears.



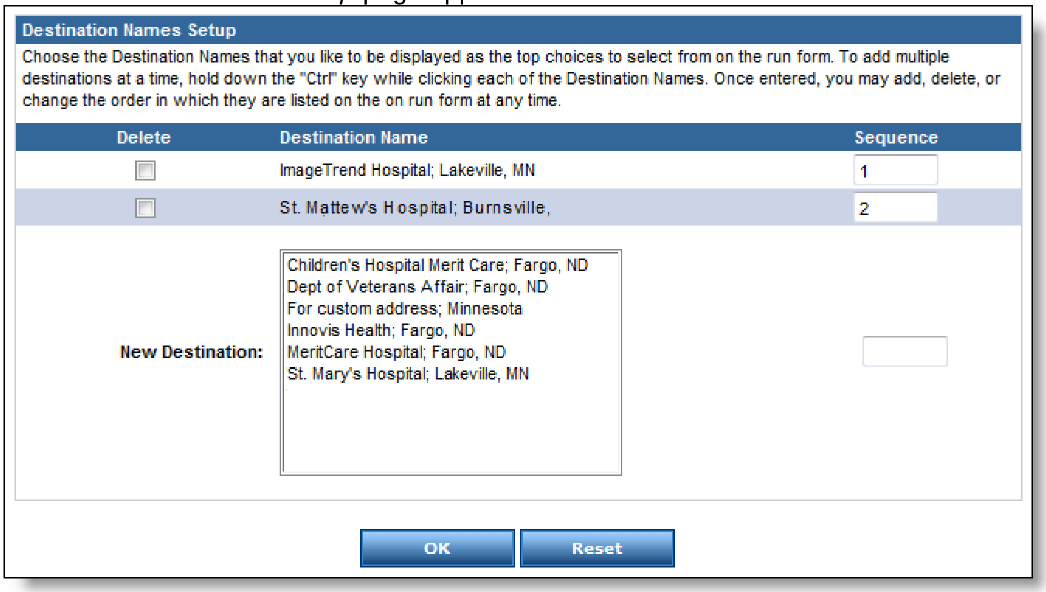
5. To add a substance to the list, from the *Medications* section, click the medication to add.
6. Click *Save.*
   The medication is added.
7. To enter the default dosage that will appear on the grid when this medication is selected, in the *Amount Taken* and *Controlled Substance Amount Units* sections, enter the amount.
8. To remove a substance from the list, from the list of substances at the top of the page, select the desired *Delete* checkbox.
9. Click *Save.*

4.23 Setting up Favorite Destinations

In this section, you can select which of the available destinations should be added to the run form for this service. Favorite destinations will be at the top of the list of destinations, allowing them to be selected quickly and easily from run forms.

1. In the Web-based system, from the top left, click *My Service.*
2. Select the *Setup* tab*.*
3. Under the *Run Forms* section, select *Sorting.*
   A sub-menu appears.

4. Under *Sorting,* click *Destinations.*
   The *Destination Names Setup* page appears.



5. To add a destination to the list, from the *New Destination* section, click the destination to add.
6. Click *OK.*
7. To remove a destination from the list, from the list of destinations at the top of the page, select the desired *Delete* checkbox.
8. Click *OK.*
9. To re-order destinations, in the *Sequence* text boxes, type the number corresponding to the desired order.
   HINT: You only need to type in the desired numbers for the destinations you want to move. Other destinations will take their order in the list based on the new numbers.
10. When finished making changes, to save, click *OK.*

4.24 Setting Up Dynamic Run Form Options

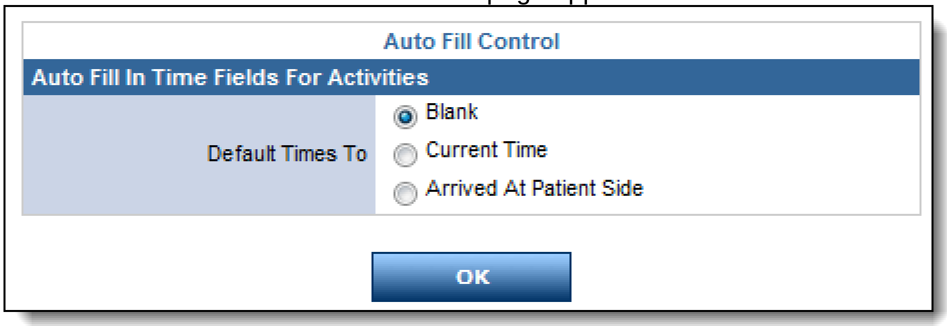
When using the dynamic run form, there are several options that you can set up that will apply to all dynamic run form templates that your agency uses.

Setting Up Automatic Completion for Activity Times

You can set up the system to automatically fill in a specific time for activity records added to your dynamic run forms.

1. From the top left of the Web-based system, click *My Service.*
2. Select the *Setup* tab.
3. Under the *Run Forms* section, select *Dynamic Run Form.*
   A sub-menu appears.

4. Under *Dynamic Run Form,* select *Activity Times.*
   The *Auto Fill In Time Fields for Activities* page appears.

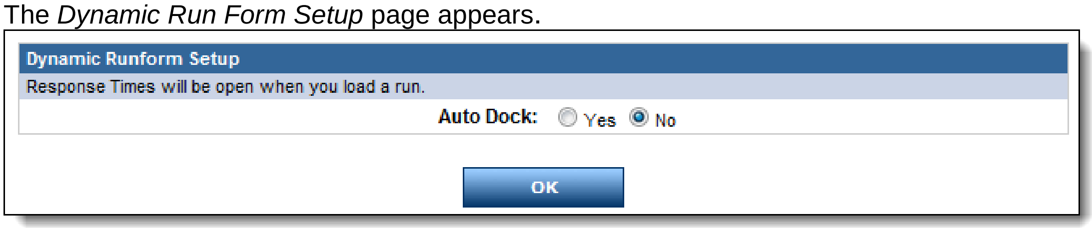


5. In the *Default Times To* section, select the option that times should be automatically set to for new activity records added to any dynamic run form template.
6. Click *OK.*
   The setting is saved.

Displaying the Response Times Panel

You can set the *Response Times* panel to automatically be open and pinned when the dynamic run form is first opened.

1. From the top left of the Web-based system, click *My Service.*
2. Select the *Setup* tab.
3. Under the *Run Forms* section, select *Dynamic Run Form.*
   A sub-menu appears.
4. Under *Dynamic Run Form,* select *Auto Dock Response Times.*
   The *Dynamic Run Form Setup* page appears.



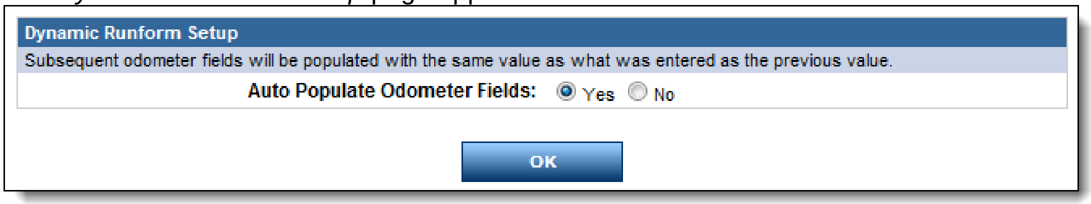
5. To display the *Response Times* panel whenever a dynamic run form is opened, select *Yes.*
6. Click *OK.*
   The setting is saved.

Selecting Odometer Field Auto Entry

You can choose to have the dynamic run form automatically fill in odometer fields with the value that you enter in the first odometer field in the run form.

1. From the top left of the Web-based system, click *My Service.*
2. Select the *Setup* tab.
3. Under the *Run Forms* section, select *Dynamic Run Form.*
   A sub-menu appears.

4. Under *Dynamic Run Form,* select *Auto-Popular Odometer Fields.*
   The *Dynamic Run Form Setup* page appears.



5. To automatically enter the first odometer field in all subsequent odometer fields, select *Yes.*
6. Click *OK.*
   The setting is saved.

Enabling Audit Tracking for Run Forms

You can choose to either enable audit tracking for all run forms or to allow run form audit tracking to be selected per incident. Please note that if this option is not available to you here, it may be set up at the system level by the system administrator.

1. From the top left of the Web-based system, click *My Service.*
2. Select the *Setup* tab.
3. Under the *Run Forms* section, select *Dynamic Run Form.*
   A sub-menu appears.
4. Under *Dynamic Run Form,* select *Audit Tracking.*
   The *Audit Tracking Always On Setup* page appears.

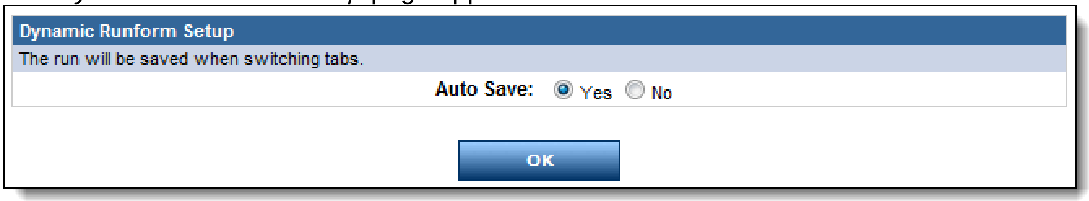
5. To ensure that incident audit tracking is always used, select *Yes.*
   OR
   To allow incident audit tracking to be determined by incident, select *No.*
6. Click *OK.*
   The settings are saved.

Setting Automatic Saving between Tabs

You can set the dynamic run form to automatically save each time a user switches tabs in the run form.

1. From the top left of the Web-based system, click *My Service.*
2. Select the *Setup* tab.
3. Under the *Run Forms* section, select *Dynamic Run Form.*
   A sub-menu appears.

4. Under *Dynamic Run Form,* select *Auto-Save After Switching Tabs.*
   The *Dynamic Run Form Setup* page appears.

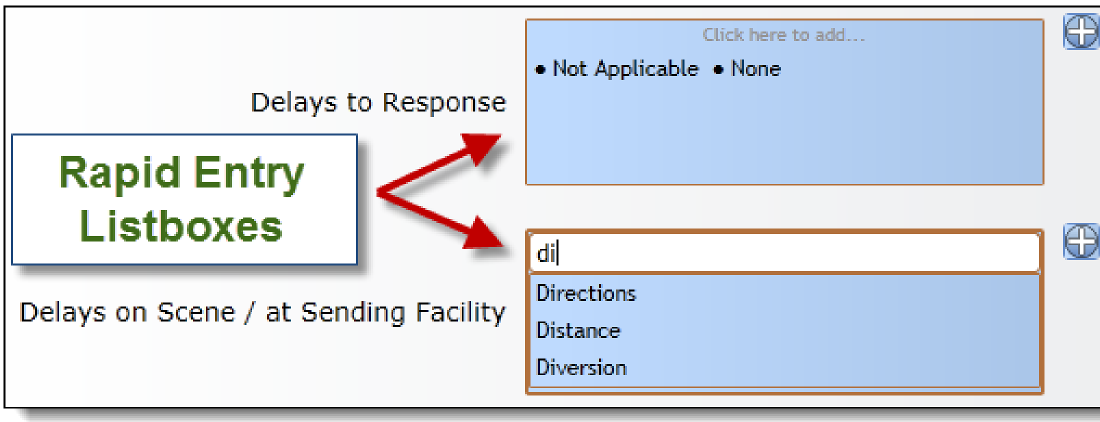


5. To enable automatic saving whenever a user switches tabs, click *Yes.*
6. Click *OK.*
   The setting is saved.

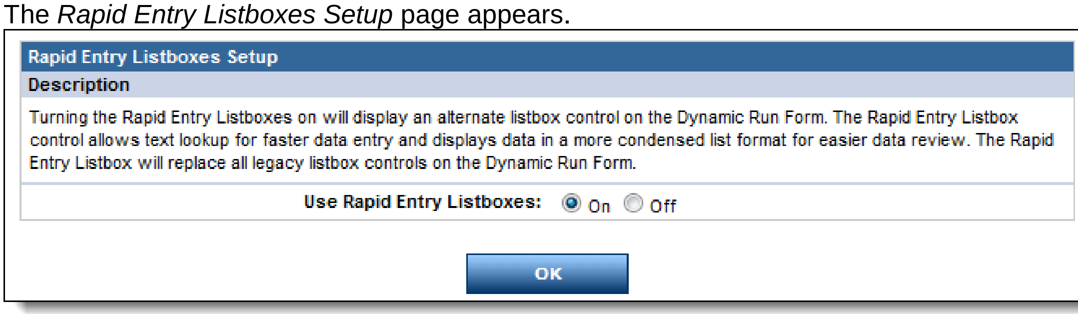
Enabling Rapid Entry Listboxes

Rapid entry listboxes are a type of run form field that allow you to select options by typing within the list box and selecting the desired option or by using the *Lookup* button. You can choose to enable these or to instead use drop down menus for all these fields.

EXAMPLE:



1. From the top left of the Web-based system, click *My Service.*
2. Select the *Setup* tab.
3. Under the *Run Forms* section, select *Dynamic Run Form.*
   A sub-menu appears.
4. Under *Dynamic Run Form,* select *Rapid Entry Listboxes.*
   The *Rapid Entry Listboxes Setup* page appears.

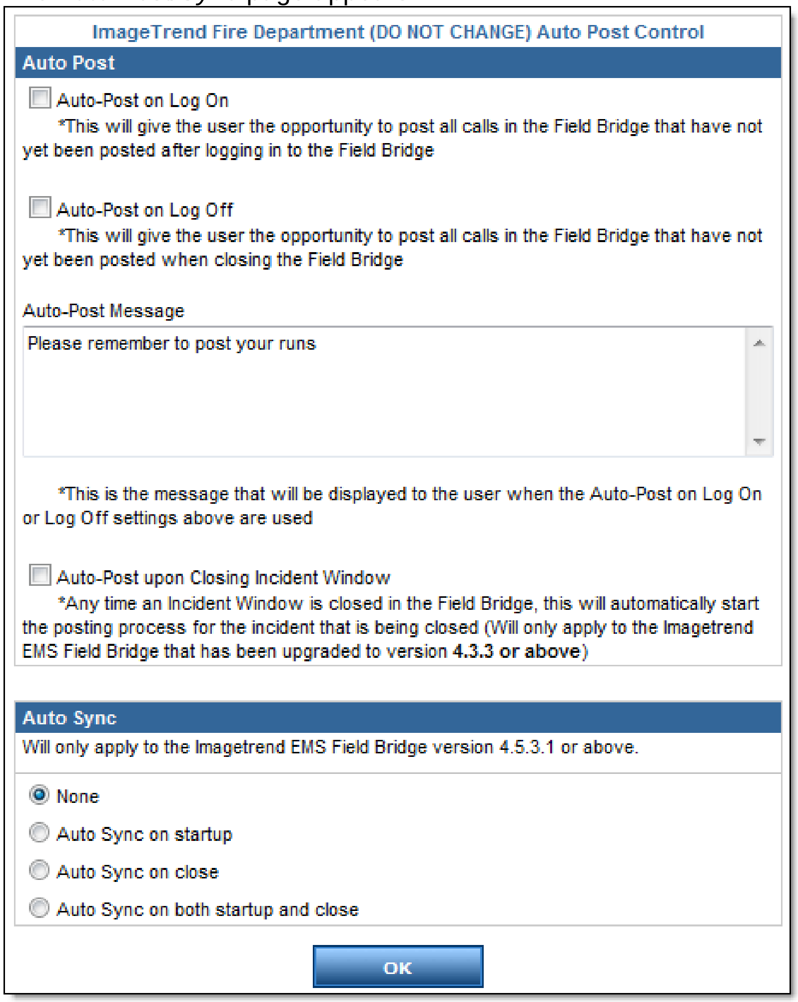


5. To enable rapid entry listboxes, select *On.*
6. Click *OK.*
   The setting is applied.

4.25 Configuring Automatic Posting and Syncing Options

Using the Service Bridge, State Bridge or Rescue Bridge, administrators can create a message for the Field Bridge that will prompt users to post runs or sync the Field Bridge and select when the message will appear.

1. In the Web-based system, from the top left, click *My Service* or *My Fire Department.*
2. Select the *Setup* tab.
3. Under the *Field Bridge* section, select *Preferences.*
   A sub-menu appears.
4. Under *Preferences,* click *Auto Post/Sync.*
   The *Auto Post/Sync* page appears.

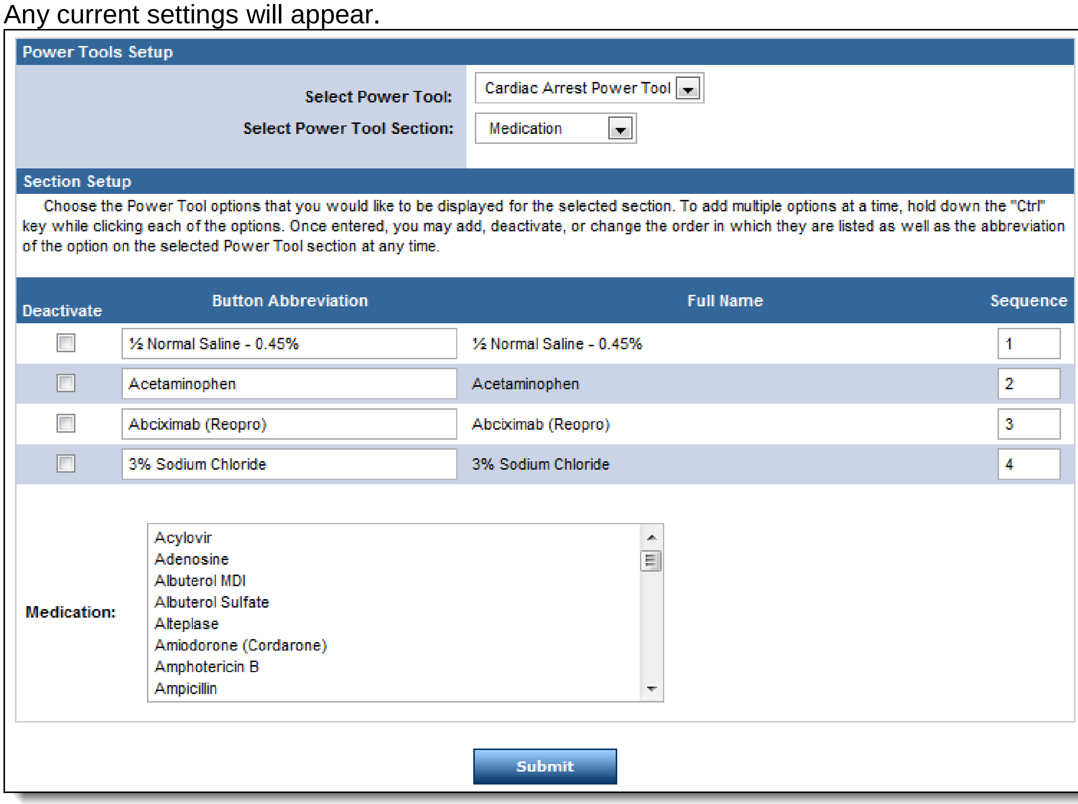


5. To create a pop up window that will prompt users to post runs, select the *Auto-Post on Log On, Auto-Post on Log Off* or *Auto-Post upon Closing Incident Window* checkboxes.
   HINT: The option that is selected will determine when the pop up window will appear.
   NOTE: All three options can be selected for multiple reminders.
6. In the *Auto-Post Message* text box, type the text that should appear in the pop up window.
7. To select times when the Field Bridge should prompt users to sync, in the *Auto Sync* section, select the desired time.
   HINT: This option will only work on Field Bridge systems that have been updated to version 4.5.3.1 or above.
8. When finished, click *OK.*

4.26 Configuring Power Tools

Using your Web-based system, administrators can configure the options that will be available for the Medication, Medication Ordered, IV, Procedure, Procedure Ordered and Cardiac power tools. This information will sync to any Field Bridge systems.

1. In the Web-based system, from the top left, click *My Service* or *My Fire Department.*
2. Select the *Setup* tab.
3. Under the *Field Bridge* section, select *Power Tools.*
   A sub-menu appears.
4. Under *Power Tools,* click *Power Tools Setup.*
5. From the *Select Power Tool* drop down menu, select the power tool to configure.
6. From the *Select Power Tool Section* drop down menu, select the portion of the power tool for which to configure the possible options.
   Any current settings will appear.

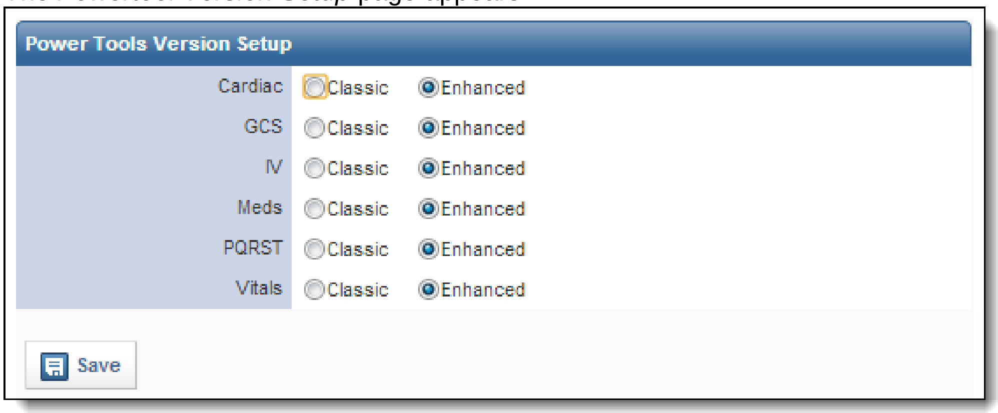


7. To add a new option, from the *Options* scroll list, select the first option to be available and click *Submit.*
8. To change the name that will appear in the list, in the *Button Abbreviation* text box, type the new name.
9. To change the order in which the item will appear, in the *Sequence* text box, type the number corresponding to the item's place in the list.
10. To remove an option from the list, select the corresponding *Deactivate* checkbox and select *Submit.*

Configuring Power Tool Versions

Version 5 introduced enhanced versions of several power tools. You can select whether to use the enhanced version or to stick with the familiar, classic power tools. The enhanced tools will be selected by default.

1. In the Web-based system, from the top left, click *My Service* or *My Fire Department.*
2. Select the *Setup* tab.
3. Under the *Field Bridge* section, select *Power Tools.*
   A sub-menu appears.
4. Under *Power Tools,* click *Power Tools Version Setup.*
   The *Powertool Version Setup* page appears.



5. Select the version you want to display for each power tool.
6. Click *Submit.*
   The changes are saved.

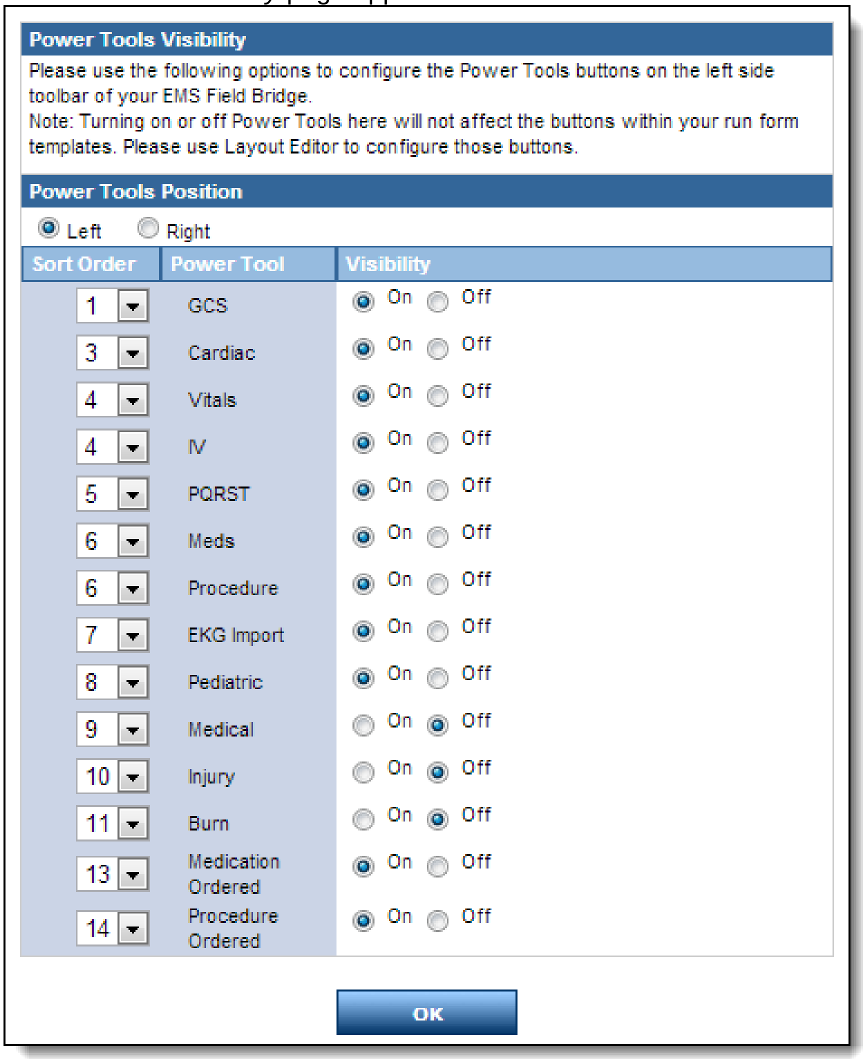
Setting Power Tool Display Options

Service administrators can configure which power tools will appear on the *Power Tool* toolbar in the Field Bridge. By default, all power tools will be displayed and available for use. Service administrators can choose to hide certain power tools from the toolbar, but will need to edit run forms to remove any links to the power tools that are within the run form.

You can also choose to move the *Power Tool* toolbar from the left side of the run form to a button on the right side (which will appear in the toolbar with the *Response Times* and *Validation* buttons). With the left side option, the toolbar will always be visible. With the right side option, the toolbar will open when the right pane is opened.

1. In the Web-based system, from the top left, click *My Service* or *My Fire Department.*
2. Select the *Setup* tab.
3. Under the *Field Bridge* section, select *Power Tools.*
   A sub-menu appears.

4. Under *Power Tools,* click *Power Tools Visibility.*
   The *Powertool Visibility* page appears.



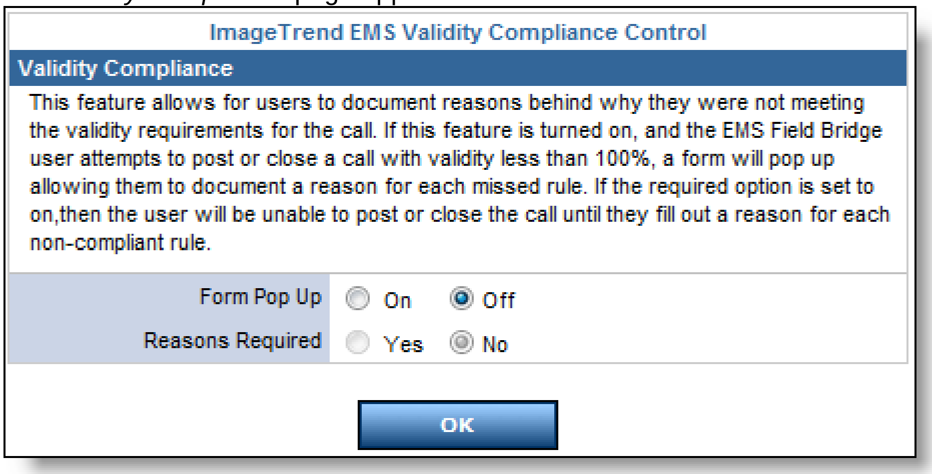
5. From the *Power Tools Position* section, select where the toolbar should appear.
   HINT: If you choose to leave the toolbar on the left, it will always be displayed on the left. If you choose to place it on the right, it will add a *Power Tools* button to the right toolbar, which will display the toolbar when the right pane is expanded.
6. For any power tool to hide from the *Power Tool* toolbar, select *Off.*
7. To change the order of the power tools in the toolbar, from the *Sort Order* drop down menus for each power tool, select the desired position in the list.
8. When finished, click *Save.*

4.27 Configuring Validity Compliance Documentation

Using the Service Bridge, State Bridge or Rescue Bridge, administrators can cause a pop up window to appear whenever the validity of a run form being closed on the Field Bridge is less than 100%. This window can either inform the user of the fields that were required and not completed or require the user to enter reasons as to why the fields were not completed.

1. In the Web-based system, from the top left, click *My Service* or *My Fire Department.*
2. Select the *Setup* tab.

3. Under the *Field Bridge* section, select *Validation.*
   A sub-menu appears.
4. Under *Validation,* click *Compliance Settings.*
   The *Validity Compliance* page appears.



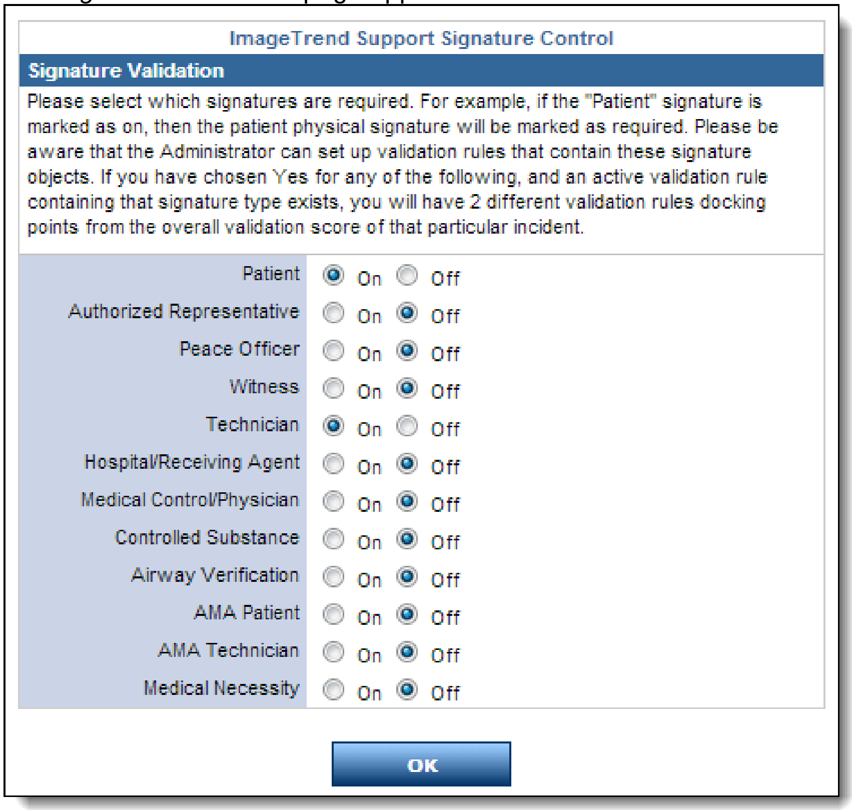
5. To cause the pop up window to appear, in the *Form Pop Up* section, select *On.*
6. To require a reason to be entered for each field that was not completed, in the *Reasons Required* section, select *Yes.*
7. When finished, click *OK.*

4.28 Configuring Required Signature Validation

Using the Service Bridge, State Bridge or Rescue Bridge, you can select which signature will be required for a complete run form. These validity requirements will sync to the Field Bridge.

1. In the Web-based system, from the top left, click *My Service* or *My Fire Department.*
2. Select the *Setup* tab.
3. Under the *Field Bridge* section, select *Validation.*
   A sub-menu appears.

4. Under *Validation,* click *Signatures.*
   The *Signature Validation* page appears.



5. For the signatures to require using validation rules, select *On.*
6. For the signatures that should not be required, select *Off.*
7. When finished, click *OK.*

4.29 Working with Active Protocols

Active protocols provide a checklist of steps and links to specific fields in the run form that should be taken for any primary impression or protocol. An active protocol can be defined for any provider impression or protocol, and will help to guide staff members through performing and documenting any standard procedure. If a situation differs from the norm, staff members can still skip steps and provide an explanation or can change the standard values.

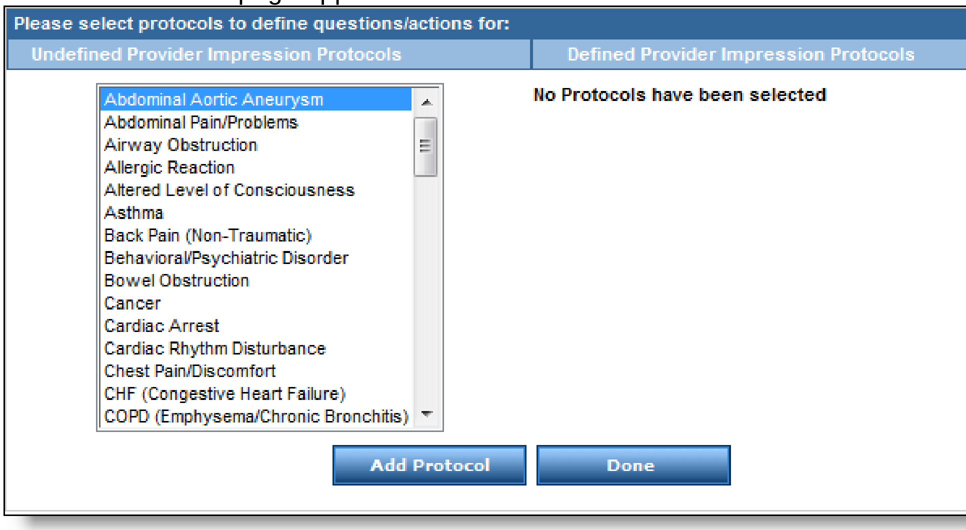
Administrators can set up new active protocols for use in the EMS Field Bridge and with dynamic run forms. Active protocols can be accessed from two different places in the *Setup* tab, but changes made to any active protocol will appear on both *Active Protocol* pages. There are two different lists of active protocols that can be set up on the *Active Protocol* page; you can set up protocols from both lists and they will be available for use.

Creating Active Protocols

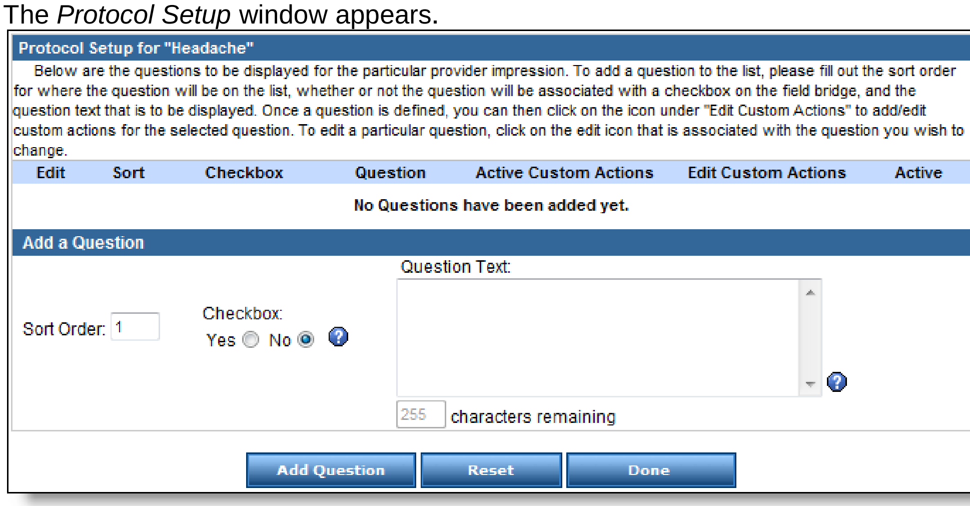
Administrators can set up new active protocols for use on the EMS Field Bridge.

1. In the Web-based system, from the top left, click *My Service* or *My Fire Department.*
2. Select the *Setup* tab*.*
3. Under the *Field Bridge* section, select *Run Form Resources > Active Protocol.*
   OR
   Under the *Run Forms* section, select *Dynamic Run Form > Active Protocol.*

The *Active Protocol* page appears.



4. From the *Undefined Provider Impression Protocols* scroll list or the *Undefined Protocols Used* scroll list, select the impression to which the protocol will apply.
5. Click *Add Protocol.*
   The *Protocol Setup* window appears.

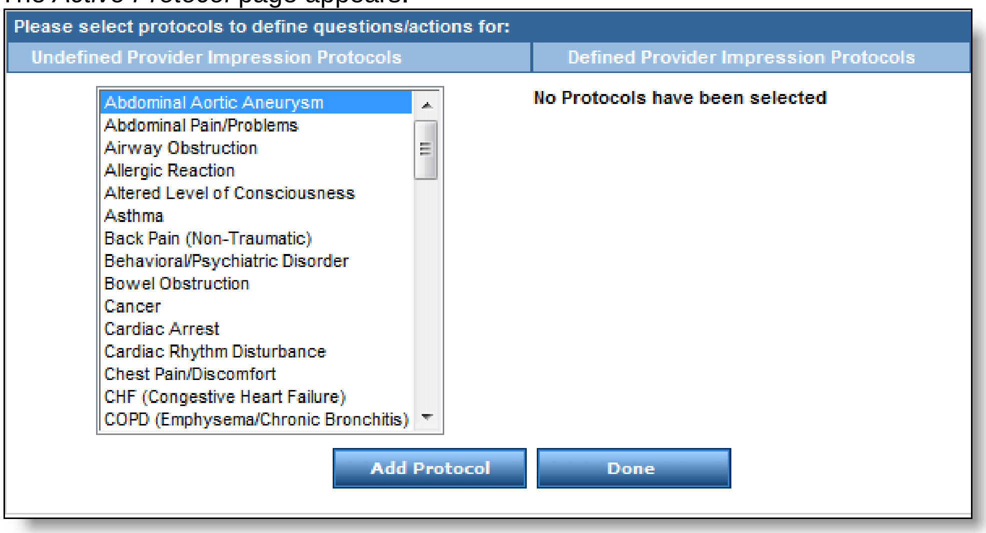


6. To create an item on the protocol checklist,
   a. In the *Checkbox* section, select *Yes.*
   b. In the *Question Text* text box, type the text for the item.
   c. To determine where in the checklist the item will appear, in the *Sort Order* text box, type the number of the item's position.
   d. When the item is ready, click *Add Question.*
      The item appears in the *Protocol Setup for "(Impression)"* section.
   e. To create a custom action, click the *Edit Custom Actions* icon .
   f. From the *Category* drop down menu, select the type of action that will be completed.
   g. From the *Action Name* drop down menu, select the action that should be performed in the Field Bridge.
   h. When finished, click *Add Action.*
   i. To add another action for this step, repeat steps f–h.
7. To add more items on the protocol checklist, repeat step 7.
8. When finished, to save the protocol, click *Done.*

Viewing and Editing Active Protocols

Administrators can view currently set up protocols and, if necessary, edit them.

1. In the Web-based system, from the top left, click *My Service* or *My Fire Department.*
2. Select the *Setup* tab*.*
3. Under the *Field Bridge* section, select *Run Form Resources > Active Protocol.*
   OR
   Under the *Run Forms* section, select *Dynamic Run Form > Active Protocol.*
   The *Active Protocol* page appears.



4. From the *Undefined Provider Impression Protocols* scroll list or the *Undefined Protocols Used* scroll list, click the name of the protocol to work with.
5. To edit the name or sort order of a step,
   a. Click the corresponding *Edit* button.
   b. Using the provided fields, make any changes.
   c. When finished, click *Update Question.*
6. To edit the actions contained within a step,
   a. Click the corresponding *Edit Custom Actions* icon .
   b. For the action to edit, click the corresponding *Edit* icon .
   c. Using the provided fields, make the desired changes.
   d. When finished, click *Edit Action.*
7. To add new actions to a step,
   a. Click the corresponding *Edit Custom Actions* icon .
   b. Using the provided fields, select the category and action.
   c. When finished, click *Add Action.*
8. When finished, click *Done.*

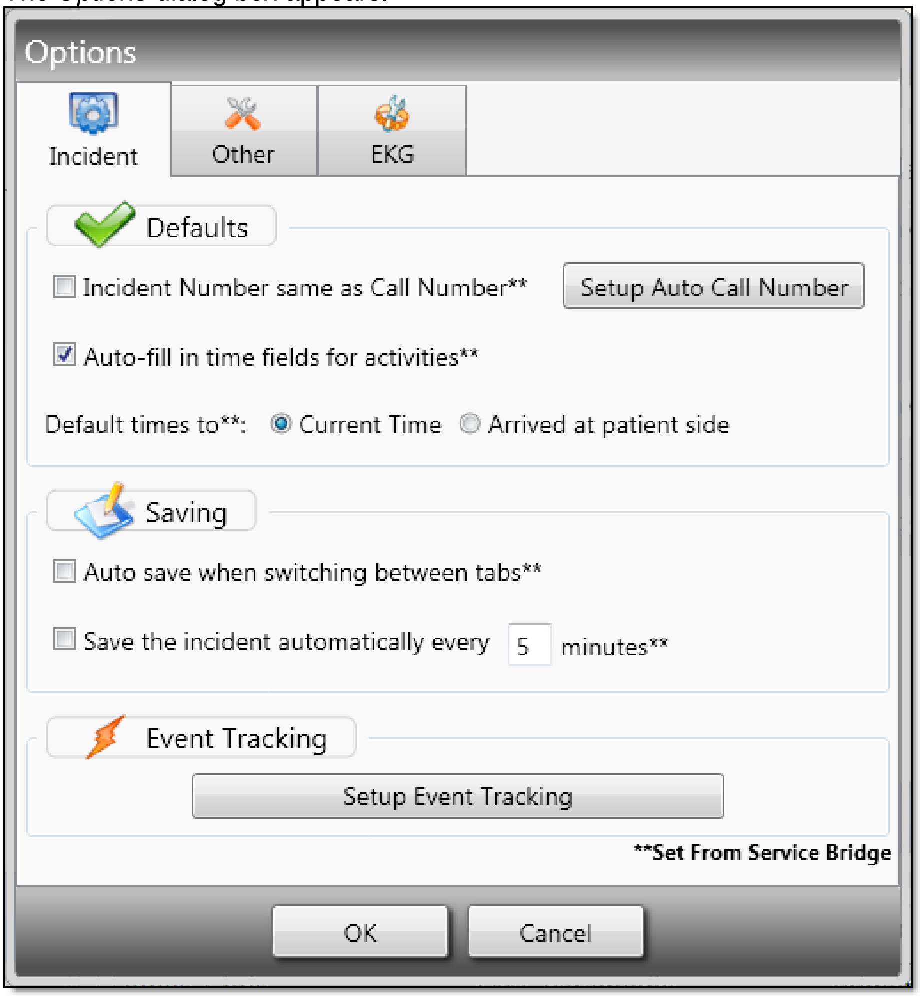
4.30 Setting Up Automatic Call Information

You can set up the Field Bridge to automatically generate call numbers for each run report and to automatically fill in times for any activities.

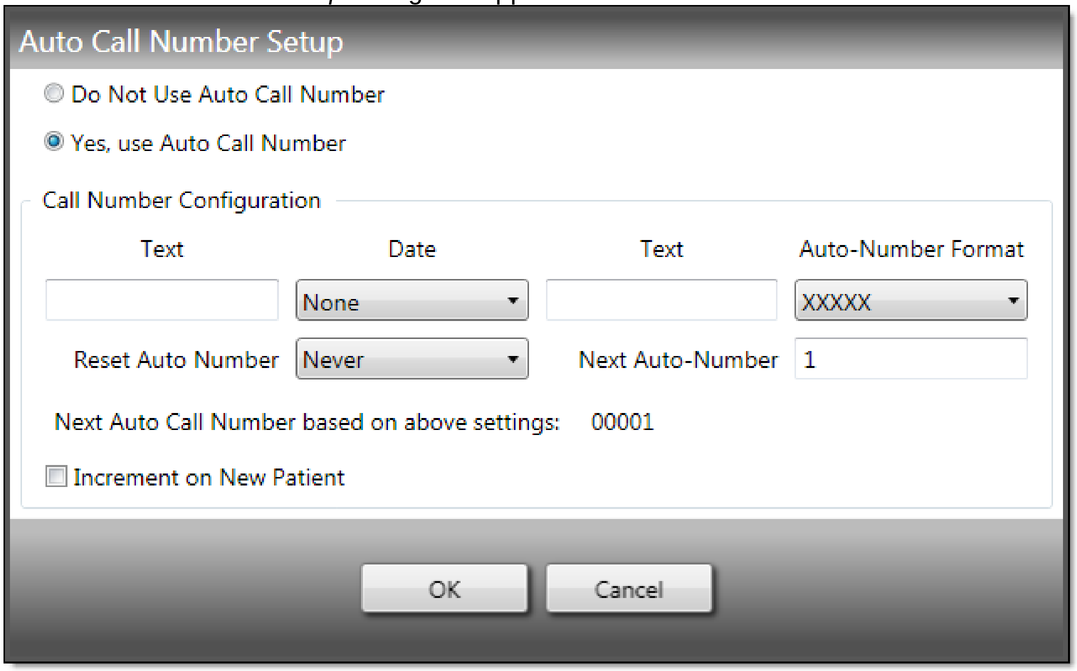
Setting Up Auto Call Numbers

You can set up a format for automatic call numbers. Each Field Bridge should have a different format to ensure that no run report is submitted to the Service Bridge with a duplicate run number.

1. In the Field Bridge, from the left menu, select *Administrative Options.* The *Options* dialog box appears.

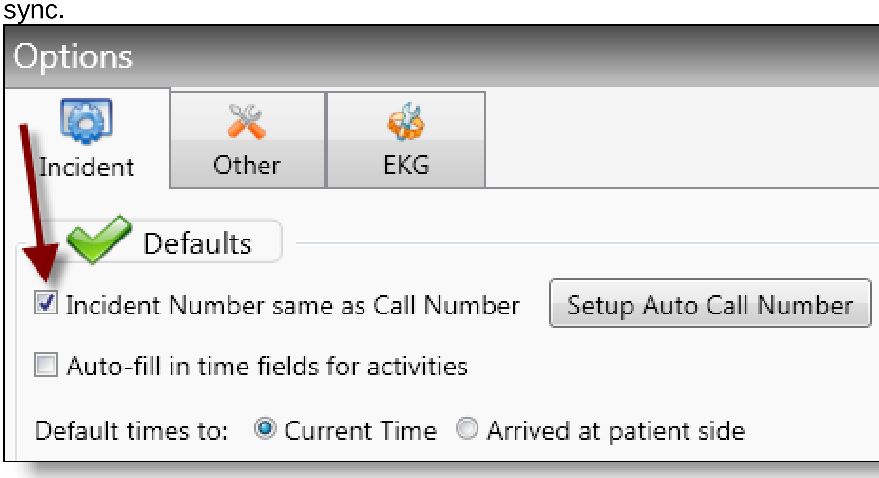


2. Click *Setup Auto Call Number.*
   The *Auto Call Number Setup* dialog box appears.



3. In the *Text 1* box, type any text to appear at the beginning of the call number.
4. From the *Date Format* drop down menu, select the format for the date information that will be included in the call number.
5. In the *Text 2* text box, type any text that will appear in the middle of the call number.
6. From the *Auto-Number Format* drop down menu, select the number of digits that will be used at the end of the number.
   HINT: These numbers will automatically increase by one with each incident report that is entered.
7. To generate a new call number when a new patient is added to an existing incident, select the *Increment on New Patient* checkbox.
8. To start the last numbers of the call number over at 0 based on a period of time, from the *Reset Auto Number* drop down menu, select how often to reset the number.
9. To manually set the next number that will be automatically generated, in the *Next Auto Number* text box, type the next number.
10. To save the changes, click *OK.*
11. To automatically assign an incident number the same as the call number, in the *Defaults* section, select the *Incident Number same as Call Number* checkbox.
    HINT: This can also be set up in the Web-based system. If you change this option from what it is set to in the Web-based system, it will be changed back the next time you

sync.



12. When finished, from the *Options* dialog box, click *OK.*

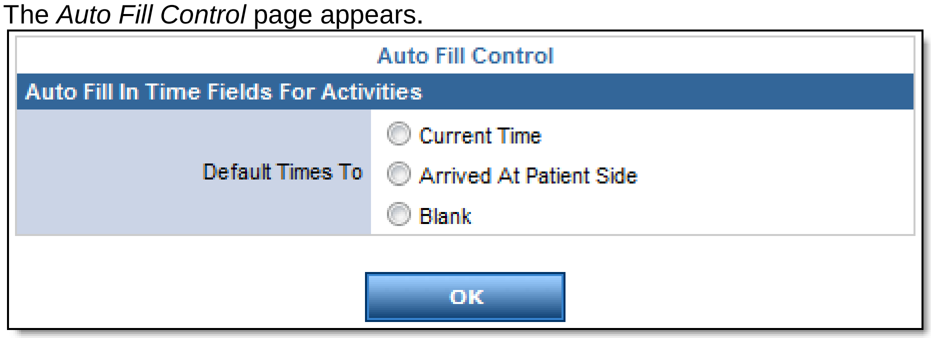
Setting Up Automatic Time Entry

The Field Bridge can automatically enter times when an activity record is entered into a run form. You can set this feature up and determine which time is automatically entered. This can be set up either in the Web-based system or the Field Bridge. If an option is set up in the Web-based system, that will be applied to each Field Bridge every time the Field Bridge syncs, even if that Field Bridge has been configured with different settings.

Setting Up Automatic Time Entry: In the Web-based System

If you set up options in the Web-based system, all Field Bridge systems will automatically be set up with these configurations when they sync.

1. In the Web-based system, from the top left, click *My Service* or *My Fire Department.*
2. Select the *Setup* tab.
3. Under the *Field Bridge* section, select *Run Form Resources.* A sub-menu appears.
4. Under *Run Form Resources,* click *Auto-Fill Time Fields.* The *Auto Fill Control* page appears.

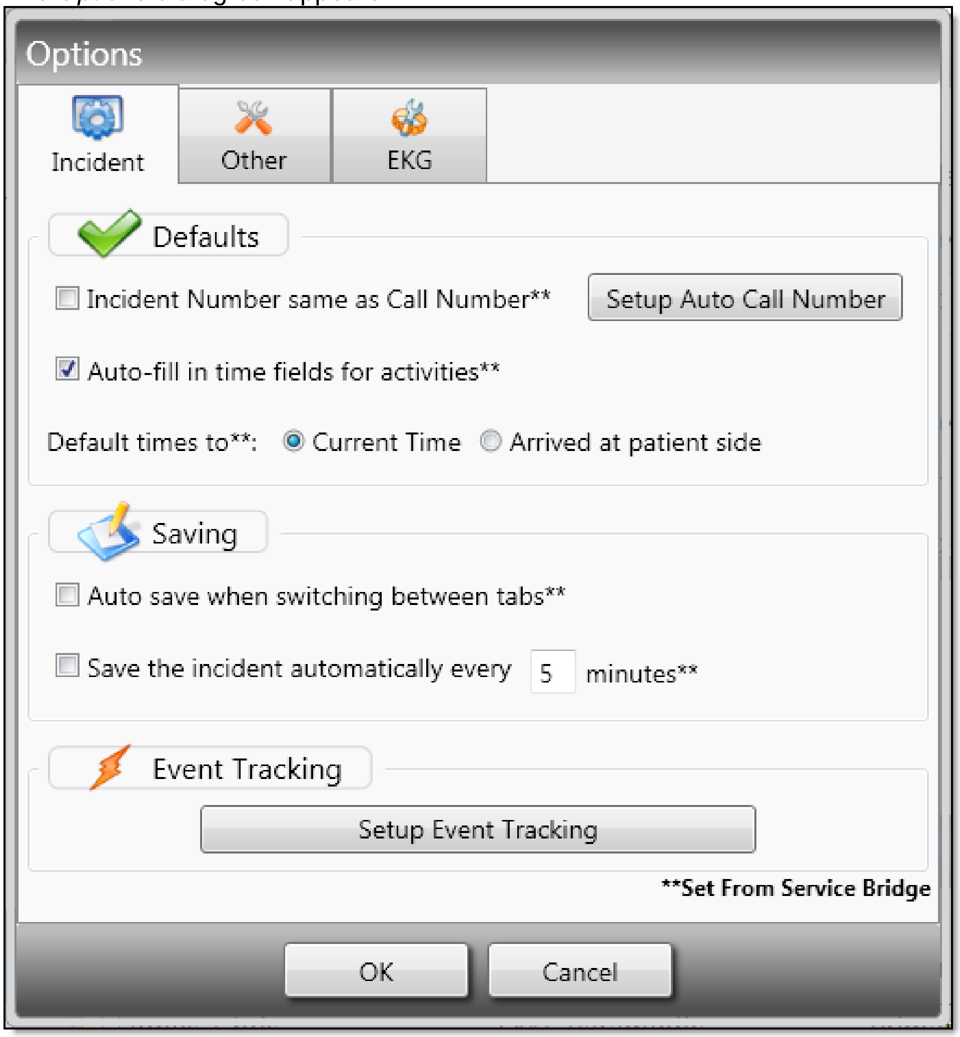


5. In the *Default Times To* section, select the time that should be automatically entered for any activity added to a run form.
6. Click *OK.*

Setting Up Automatic Time Entry: In the Field Bridge

This is generally set up in the Web-based system. If you change this option from what it is set to in the Web-based system, it will be changed back the next time you sync.

1. In the Field Bridge, from the left menu, select *Administrative Options.* The *Options* dialog box appears.



2. To automatically enter times for activities in a run form, in the *Defaults* section, select the *Auto-fill in time fields for activities* checkbox.
3. In the *Default times to* section, select the time that should be entered automatically.
4. When finished, click *OK.*

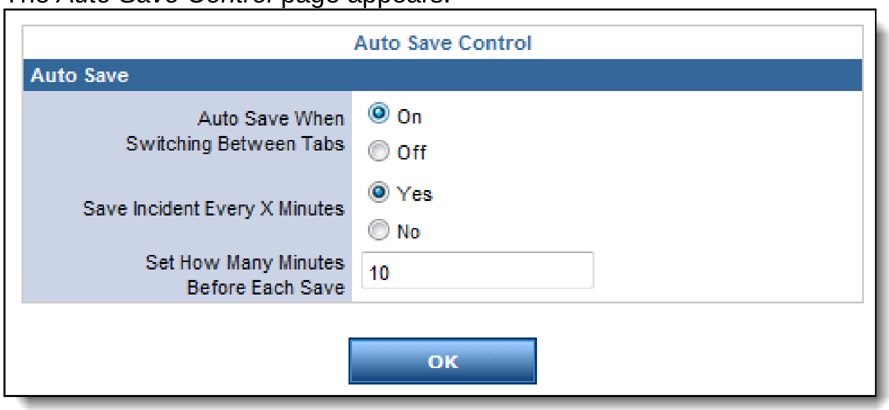
4.31 Setting Up Automatic Saving

Administrators can set up when run forms should be automatically saved to prevent loss of data. You can set this feature up and determine which time is automatically entered. This can be set up either in the Web-based system or the Field Bridge. If an option is set up in the Web-based system, that will be applied to each Field Bridge every time the Field Bridge syncs, even if that Field Bridge has been configured with different settings.

Setting Up Automatic Saving: In the Web-based System

If you set up options in the Web-based system, all Field Bridge systems will automatically be set up with these configurations when they sync.

1. In the Web-based system, from the top left, click *My Service* or *My Fire Department.*
2. Select the *Setup* tab.
3. Under the *Field Bridge* section, select *Run Form Resources.*
   A sub-menu appears.
4. Under *Run Form Resources,* click *Auto-Save.*
   The *Auto Save Control* page appears.

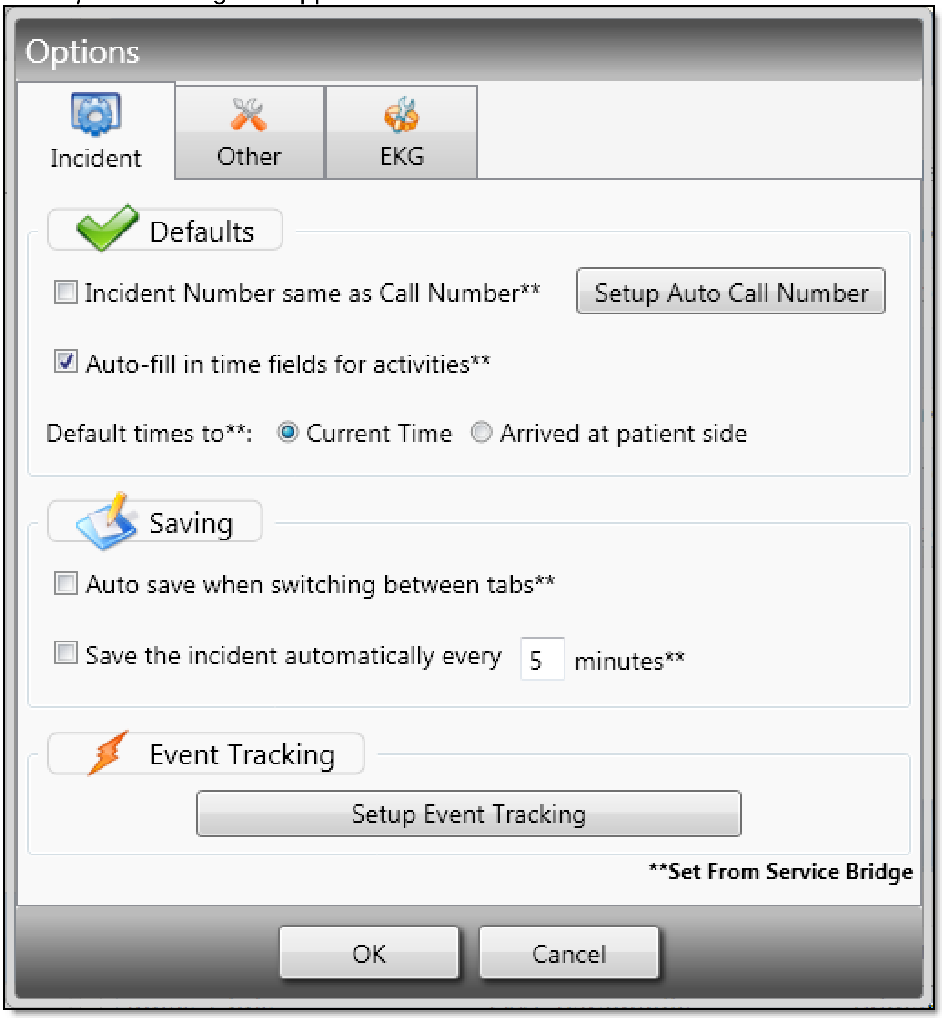


5. In the *Auto Save* section, select when the run form should be automatically saved.
   HINTS:
   ImageTrend highly recommends selecting the *Auto Save When Switching Between Tabs* option, as this will prevent data from being lost if a provider forgets to save before moving on to a new tab.
   If you choose to save after a certain number of minutes, you can enter the number of minutes.
6. If you chose to automatically save after a specific number of minutes, in the *Set How Many Minutes Before Each Save* text box, type the number of minutes.
7. When finished, click *OK.*
   The settings are saved, and will be applied to all Field Bridge systems the next time they sync.

Setting Up Automatic Saving: In the Field Bridge

If you change this option from what it is set to in the Web-based system, it will be changed back the next time you sync.

1. In the Field Bridge, from the left menu, select *Administrative Options.*
   The *Options* dialog box appears.



2. To automatically save a run form when a new tab is opened, in the *Saving* section, select the *Auto save when switching between tabs* checkbox.
3. To automatically save a run form after a certain period of time when it is open,
   a. In the *Saving* section, select the *Save incident every __ minutes* checkbox.
   b. In the text box, enter the number of minutes after which the run report should be automatically saved.
4. When finished, click *OK.*

CHAPTER 5

EDITING RUN FORMS AND REPORTS IN THE LAYOUT EDITOR

5.1 Chapter Overview

The Layout Editor allows you to create custom templates for PDF forms and EMS run forms. This chapter explains how to work with the report and run form templates in the Layout Editor, including tips, terms and the steps you'll need to take to update a template.

5.2 Getting Started with Dynamic Run Form Templates

Using Rescue Bridge, administrators can create new custom EMS run forms for the Field Bridge and Rescue Bridge or can edit existing templates using the dynamic run form. This allows you to create templates for specific common situations, such as a cancelled call. In addition, you can rearrange the fields, panels and tabs in existing run forms to make the run form specific to your agency. Please keep in mind that no additional instructions will be available for filling out custom run forms that you have created, although all features will work in the same way.

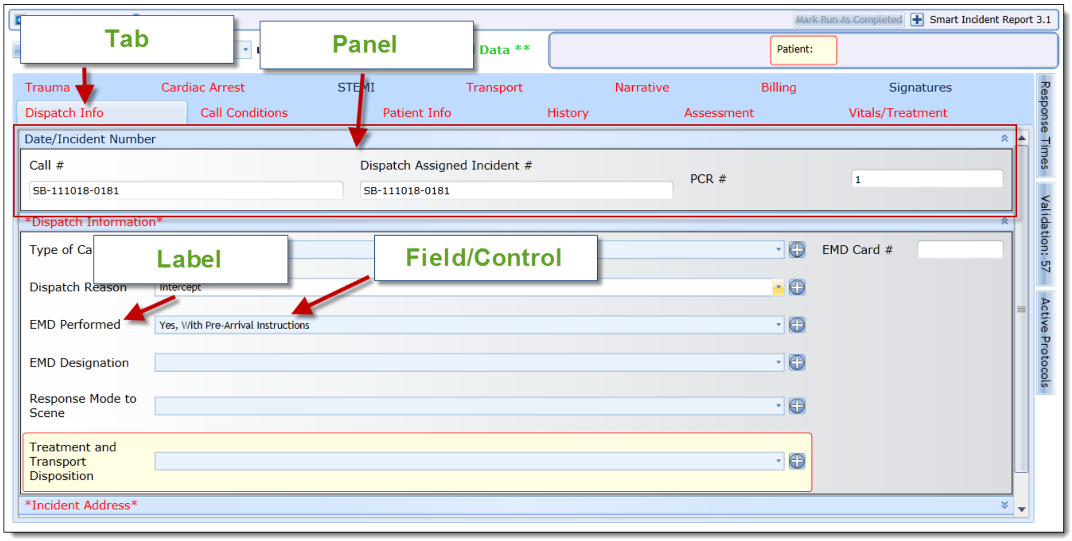
Both service and system administrators will have access to the Layout Editor for the dynamic run form. As a service administrator, if you encounter run forms that you cannot edit, they may have been set up on a system administrator level. In this case, you can create a copy of the run form and edit the copy to your desired specifications.

Tips and Recommendations

- When beginning to work with creating or editing run forms, ImageTrend recommends that you create a copy of the run form you are working with. Make changes to the copy to prevent accidental changes to a necessary run form that is currently in use.
- When creating a new run form, it may be easier to copy an existing run form if much of the information will be the same. This allows you to change, move or delete fields, panels and tabs, without having to add all information in from scratch.
- New Field Bridge templates will not be copied to each Field Bridge until the Field Bridge syncs with Rescue Bridge.
- If a template does not display multiple tabs for required fields, the run form may have a low validity score due to fields that could not be completed.
- When working on a template, be sure that template is inactive until it is finished. Otherwise, crew members may attempt to document a run on an unfinished run form.

Terms

Understanding the following terms and how they relate to run form templates will help you to edit and build dynamic run form templates.



Visibility Event

A visibility event allows you to display and hide run form information based on the data entered into a run form.

Default Value

A default value is the data that will be entered in a field automatically when a new run form is started.

Active/Inactive

An active item will be displayed and can be used. An inactive item will be hidden and cannot be used, but can still be referenced by the administrator if necessary.

Run Form Template Structure

When editing dynamic run form templates, you'll find that there are several different "layers" of editing for each template. At each layer, you will have access to different information for editing.

Layout Editor
There are several items that can be set up from the *Layout Editor* page that will not be associated with any single template.

- Provider actions (will apply to all run form templates)
- New run forms

Run Form Template
You can edit information for the entire run form template from the list of run forms, by clicking the *Edit* icon. The following information can be edited at this level:

- Template name
- Template status (e.g., active, inactive)
- Products that can use this template (e.g., Field Bridge Xpress, Field Bridge, Rescue Bridge)

Tabs
You can edit the following information after clicking the *View Tabs* button for a template:

- Tab names and order

- Tab status (e.g., active, inactive)
- Run form header
- Visibility events

Panels
You can edit the following information after navigating to the tab and/or panel you want to work with:

- Panel names and order
- Panel status (e.g., active or inactive, and expanded or collapsed)
- Physical layout of panels (e.g., number of rows or columns)
- Controls included in a panel

Controls
You can edit the following information when editing a specific control:

- Margins, alignment, text and position of labels and text for fields
- Position and size of the control
- Default values to be selected for fields
- Control status (e.g., active, inactive)

5.3 Getting Started with PDF Report Templates

The PDF Layout Editor is available for people who have access to the Layout Editor in Rescue Bridge. The PDF Layout Editor allows you to customize templates for the printable PDF reports that are generated from EMS run forms.

As a service administrator, if you encounter report templates that you cannot edit, they may have been set up on a system administrator level. In this case, you can create or request a copy of the template and edit the copy to your desired specifications. If you have worked previously with the Layout Editor for the dynamic run form, you will find that working in the PDF Layout Editor is very similar.

If you have worked with editing dynamic run forms through the Layout Editor, you may find that many of the tasks required to update a PDF report through the Layout Editor are the same.

Before you can use the PDF Layout Editor, you must have access to the Layout Editor.

Tips and Recommendations

- When beginning to work with creating or editing templates, ImageTrend recommends that you create a copy of the report template you are working with. Make changes to the copy to prevent accidental changes to a necessary report that is currently in use.
- When creating a new report, it may be easier to copy an existing template if much of the information will be the same. This allows you to change, move or delete fields, panels and tabs, without having to add all information in from scratch.
- When working on a template, be sure that template is inactive until it is finished. Otherwise, crew members may attempt to print an unfinished report.

Terms

Understanding the following terms and how they relate to report templates will help you to edit and build report templates.

Active/Inactive

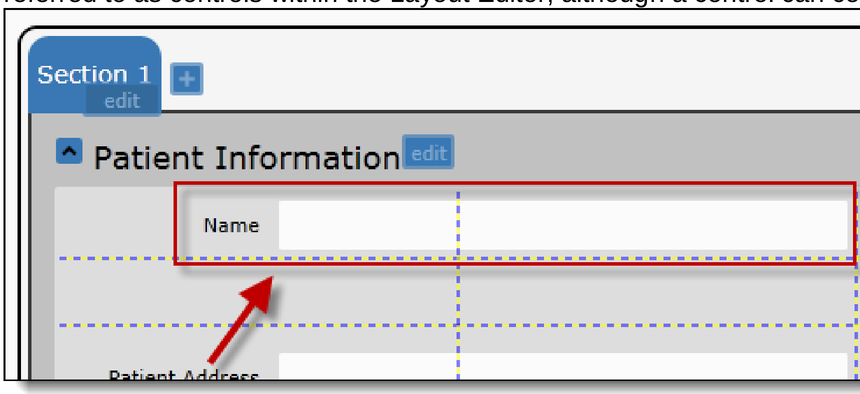
An active item will be displayed and can be used. An inactive item will be hidden and cannot be used, but can still be referenced by the administrator if necessary.

Control

A control is a specific field that can be inserted into a report template using the Layout Editor. Controls are also frequently called fields; however, a control can also contain several fields (for example, the Technician Signature control contains individual fields for the technician to sign, print his/her name and enter the date).

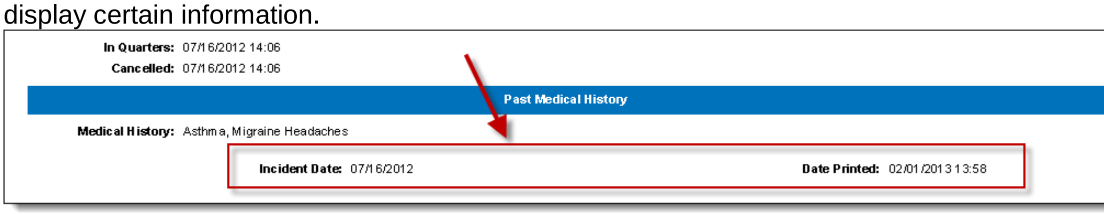
Field

A field is a space for a piece of information within your template. Fields are also frequently referred to as controls within the Layout Editor, although a control can contain multiple fields.



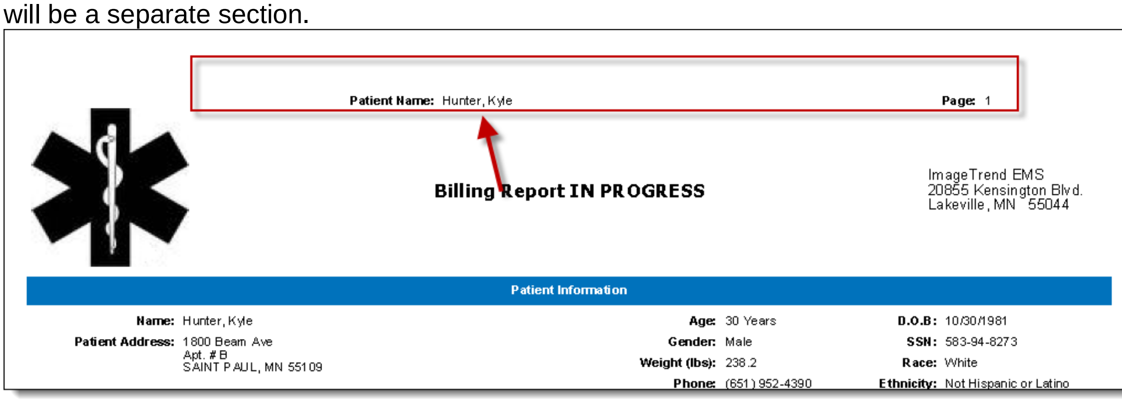
Footer

The footer is a section at the very bottom of each page of the report that can be configured to display certain information.



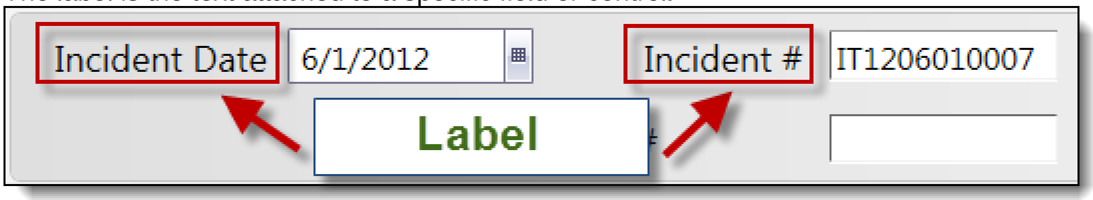
Header

The header is a section at the top of the page that can be configured to display certain information. For the PDF Layout Editor, the section referred to as the header will not be the section of the report that displays your service information, logo and name of the report, but will be a separate section.



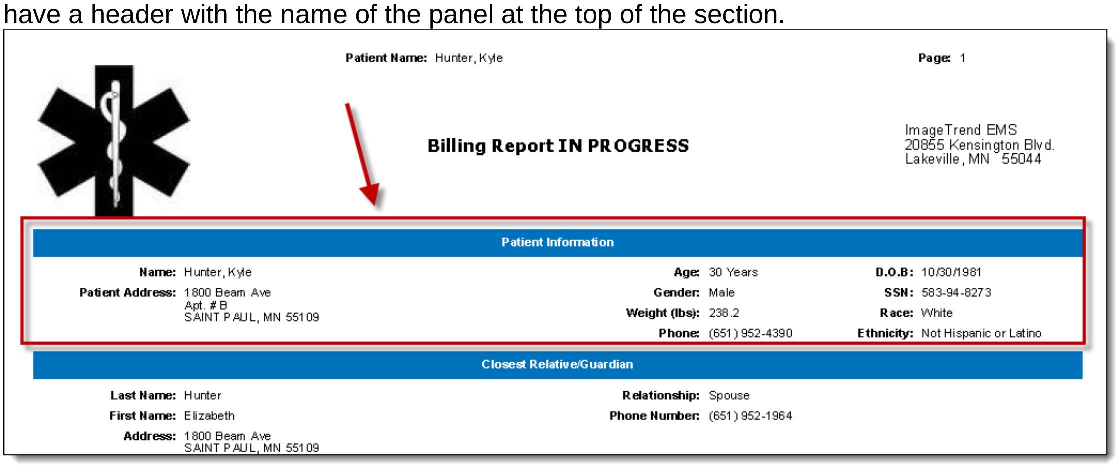
Label

The label is the text attached to a specific field or control.



Panel

A panel within a template is a section containing several fields, within a single tab. Panels will have a header with the name of the panel at the top of the section.



Tab

A tab in PDF report is a collection of panels that will be grouped together. A page break will be placed at the beginning of each new tab.

Theme

A theme is the visual style settings that will be used in the report, including font, color and text styles.

Type

Each template is assigned a type of system or service. System templates can only be edited by system administrators in the *Admin* section, and service templates can be edited within the *Setup* tab for each service by the service administrator.

Report Template Structure

When editing PDF report templates, you'll find that there are several different "layers" of editing for each template. At each layer, you will have access to different information for editing.

PDF Layout Editor

There are several items that can be set up from the *Layout Editor* page that will not be associated with any single template. Keep in mind that the PDF Layout Editor is contained within the Layout Editor for the dynamic run form.

- New and copied templates

Run Form Template
You can edit information for the entire report template from the list of templates, by clicking the *Edit* icon. The following information can be edited at this level:

- Template name
- Template status (e.g., active, inactive)
- Setting to use the template as a PDF report template

Tabs
You can edit the following information after clicking the *View Tabs* button for a template:

- Tab names and order
- Tab status (e.g., active, inactive)
- Header and footer content
- Theme information (e.g., font, color) for the report

Panels
You can edit the following information after navigating to the panel you want to work with:

- Panel names and order
- Panel status (e.g., active or inactive)
- Option to hide the panel if no data is entered
- Physical layout of panels (e.g., number of rows or columns)
- Controls included in a panel

Controls
You can edit the following information when editing a specific control:

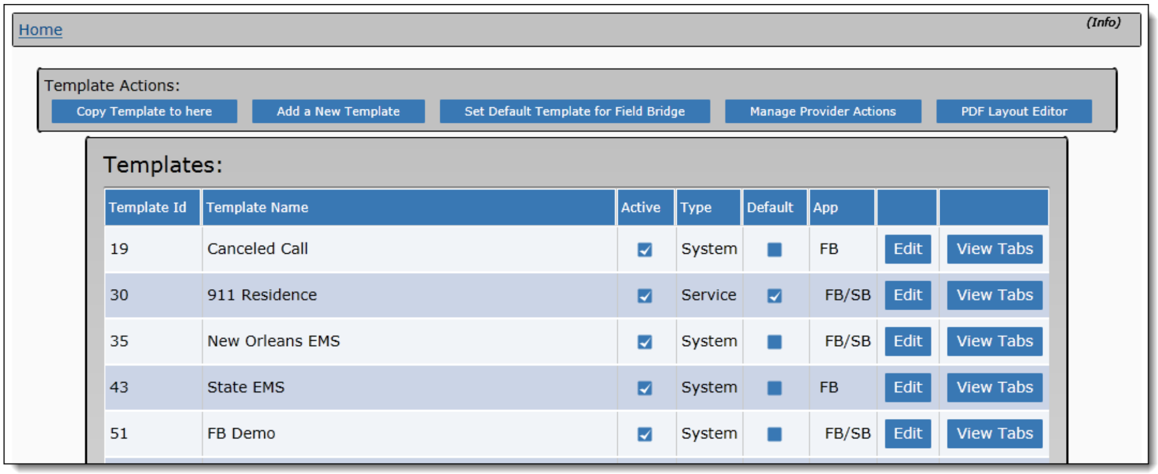
- Margins, alignment, text and position of labels and text for fields
- Position and size of the control
- Option to hide the field if no data is entered
- Control status (e.g., active, inactive)

5.4 Setting a Default Field Bridge Run Form Template

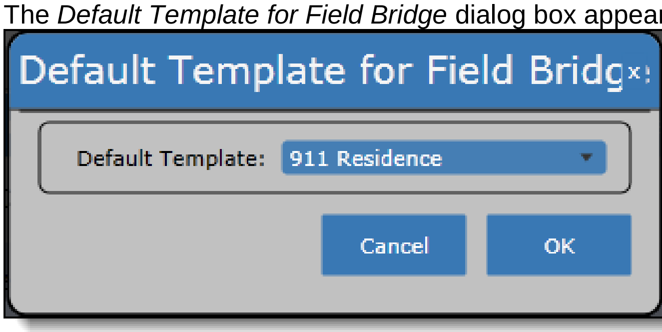
If your service has created multiple run forms, administrators can use the Web-based system to select which run form should be set as the default. The default run form will appear when a user clicks the *Add New Run* button in the left menu of the Field Bridge Dashboard.

1. In the Web-based system, from the top left, click *My Service* or *My Fire Department.*
2. Select the *Setup* tab*.*
3. Under the *Run Forms* section, select *EMS Form Configuration.*
   A sub-menu appears.
4. Under *EMS Form Configuration,* select *Layout Editor.*
   The Layout Editor opens.
   HINTS:
   The Layout Editor requires that you have Silverlight, a free plugin from Microsoft, installed on your computer.
   If you have not used the Layout Editor before or have performed an update, you may receive a message asking you to increase your cache. It is recommended that you agree to this, as it will

help the Layout Editor load faster.



5. From the *Template Actions* toolbar at the top of the page, click *Set Default Template for Field Bridge.*
   The *Default Template for Field Bridge* dialog box appears.



6. From the *Default Template* drop down menu, select the desired template.
7. Click *OK.*
   A confirmation dialog box appears.
8. To set the selected template as the default, click *OK.*
   To cancel and retain the original default template, click *Cancel.*

5.5 Setting a Template as Active or Inactive

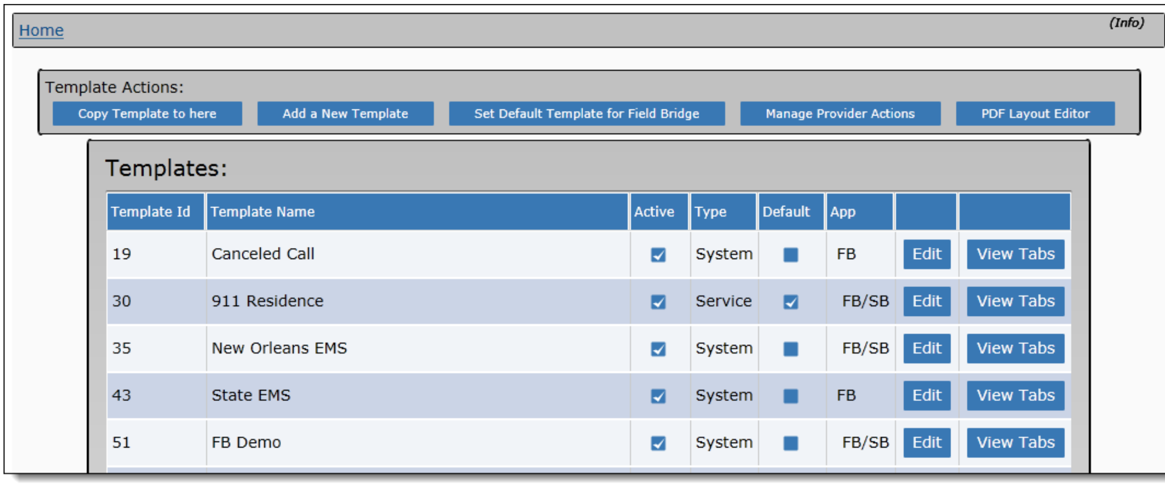
Administrators have the ability to activate or deactivate run form template. All active templates will be copied to any Field Bridge system that syncs to the Service Bridge/State Bridge/Rescue Bridge, while inactive templates will be saved in the Web-based system for reference or later use, but will not be available to Field Bridge users.

Keep in mind that if this template is used on both the Web-based system and the Field Bridge, it must be either active or inactive for both systems; it cannot be active for one system and inactive for another unless you create two identical templates.

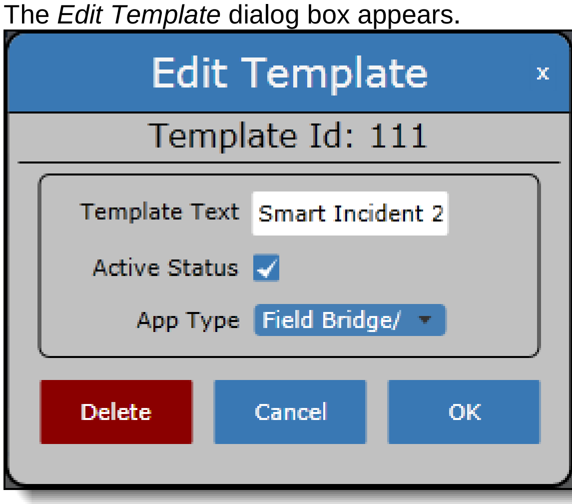
1. In the Web-based system, from the top left, click *My Service* or *My Fire Department.*
2. Select the *Setup* tab.
3. Under the *Run Forms* section, select *EMS Form Configuration.*
   A sub-menu appears.
4. Under *EMS Form Configuration,* select *Layout Editor.*
   The Layout Editor opens.

   HINTS:

The Layout Editor requires that you have Silverlight, a free plugin from Microsoft, installed on your computer.
If you have not used the Layout Editor before or have performed an update, you may receive a message asking you to increase your cache. It is recommended that you agree to this, as it will help the Layout Editor load faster.



5. For the desired template, click *Edit.*
   The *Edit Template* dialog box appears.



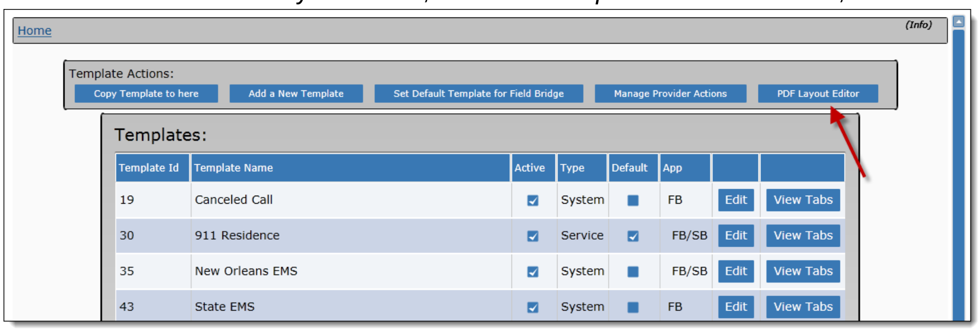
6. To set this template as active and available for use on the Field Bridge, ensure that the *Active Status* checkbox is selected.
   OR
   To set this template as inactive and not available for Field Bridge use, deselect the *Active Status* checkbox.
7. When finished, click *OK.*

5.6 Opening the Layout Editor

As a service administrator, you can access the Layout Editor in several different locations for your service. Since the dynamic run form can be used for both Field Bridge and your Web-based system, you will be able to edit run form templates for both applications in the Layout Editor, no matter where you access it from.

1. In the Web-based system, from the top left, click *My Service* or *My Fire Department.*
2. Select the *Setup* tab.

3. Under the *Run Forms* section, select *EMS Form Configuration.*
   A sub-menu appears.
4. Under *EMS Form Configuration,* select *Layout Editor.*
   The Layout Editor opens.
   HINTS:
   The Layout Editor requires that you have Silverlight, a free plugin from Microsoft, installed on your computer.
   If you have not used the Layout Editor before or have performed an update, you may receive a message asking you to increase your cache. It is recommended that you agree to this, as it will help the Layout Editor load faster.
5. To work with the PDF Layout Editor, from the *Template Actions* toolbar, click *PDF Layout Editor.*

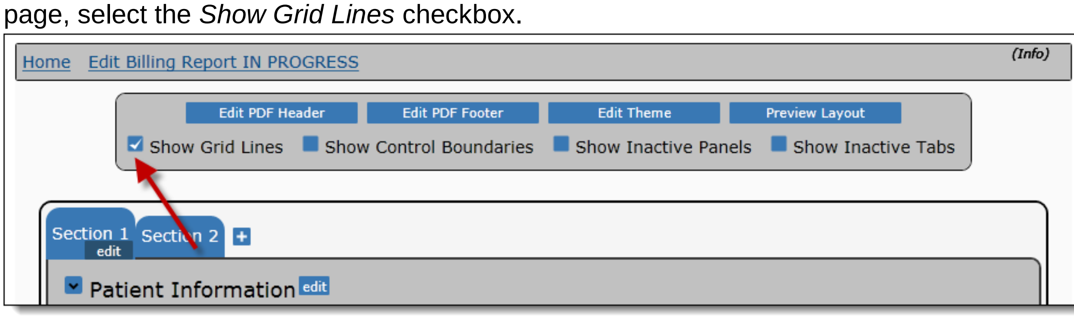


   The Layout Editor for PDF reports appears.

5.7 Updating the Display of the Layout Editor

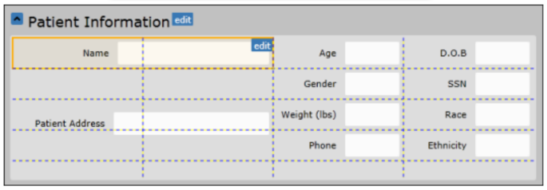
You can configure several settings in the Layout Editor to change the way it appears while you are working with templates. These options will not affect the way that users see the template, but can change what you see while you're working with either run form or PDF report templates in the Layout Editor.

1. Open the Layout Editor.
   HINTS:
   For more information, please refer to the *Opening the Layout Editor* section on page 105.
   You can control the display options for run form and PDF report templates separately. If you are updating the display for run form templates, use the Layout Editor for run forms. If you are updating the display for PDF reports, open the PDF Layout Editor.
2. Click the *View Tabs* button for a template.
   The template details appear.
3. To display grid lines within each panel for the rows and columns, in the toolbar at the top of the page, select the *Show Grid Lines* checkbox.

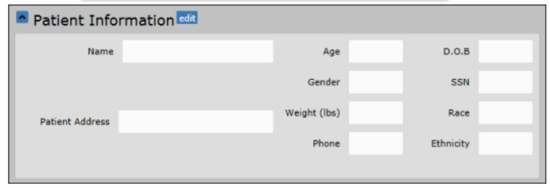


EXAMPLE:

Grid Lines Displayed

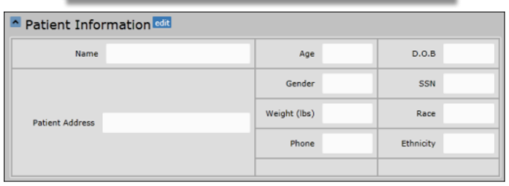


Grid Lines Not Displayed

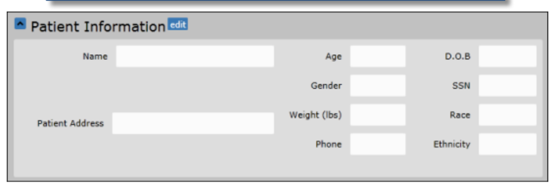


4. To display the boundaries on each control, in the toolbar at the top of the page, select the *Show Control Boundaries* checkbox.
   HINTS:
   This can be useful for identifying parent controls, as you will see the boundary line around the group of sub-controls.
   If you have grid lines displayed, it may be difficult to see the control boundaries in addition to the grid lines.
   EXAMPLE:

Control Boundaries Displayed



Control Boundaries Not Displayed



5. If you want to hide panels that were marked as inactive while you work with the template, deselect the *Show Inactive Panels* checkbox.
   OR
   If you want to show panels that were marked as inactive while you work with the template, select the *Show Inactive Panels* checkbox.
6. If you want to hide tabs that were marked as inactive while you work with the template, deselect the *Show Inactive Tabs* checkbox.
   OR
   If you want to show tabs that were marked as inactive while you work with the template, select the *Show Inactive Tabs* checkbox.

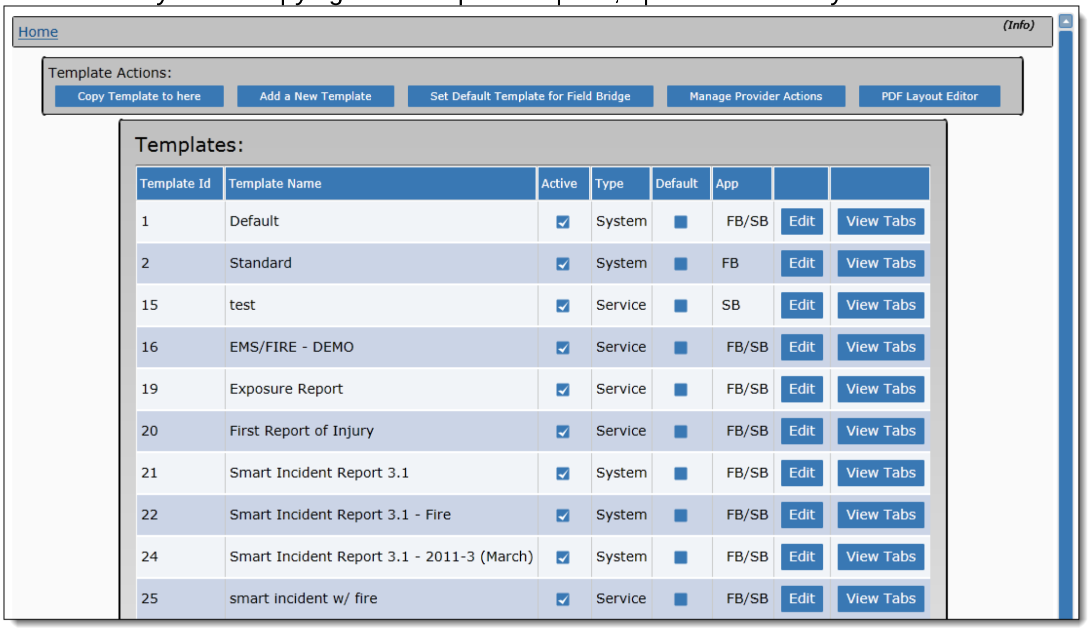
5.8 Creating a Copy of a Template

You can copy a template for testing, to keep a backup copy before editing or to create a new template similar to an existing one. If you want to create a template, we recommend that you begin by copying an existing template so that you do not need to start from scratch.

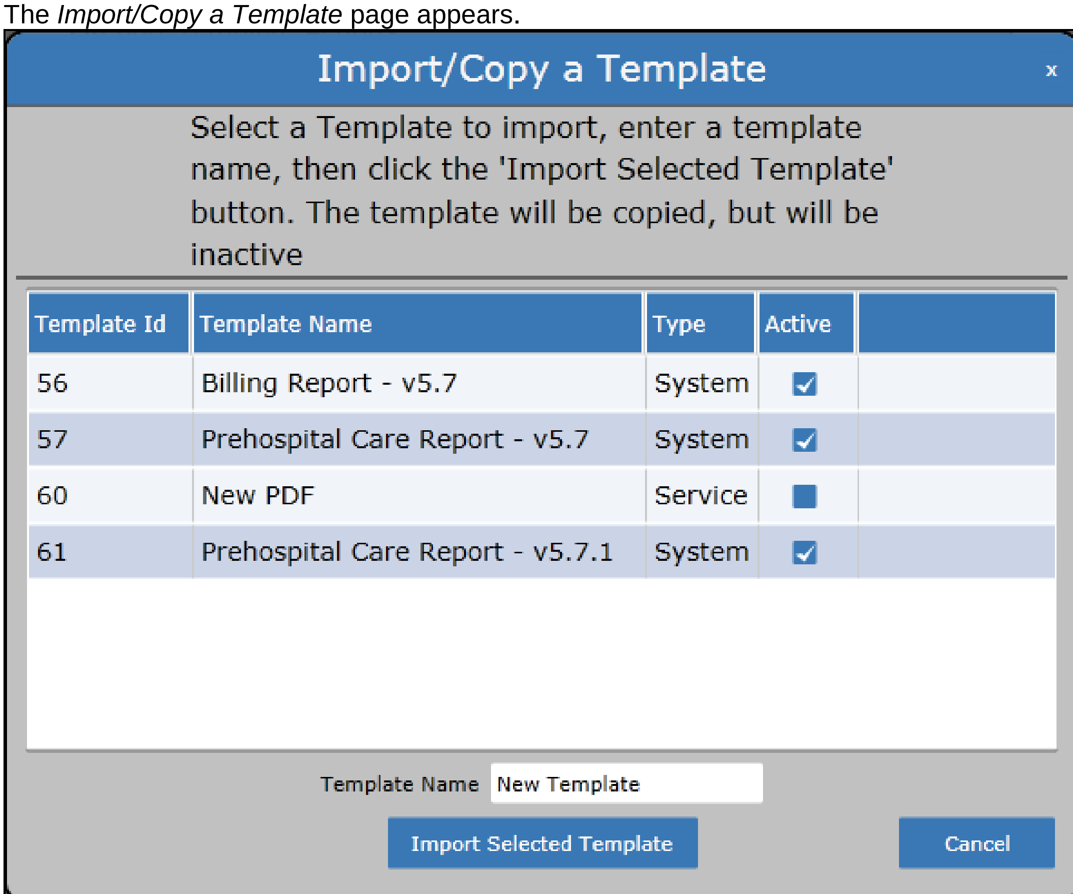
Note that when you create the template, it will be automatically marked as inactive so that no one attempts to use it before you are finished working with it. When you are finished, make sure to mark the template as active.

1. Open the Layout Editor.
   The *Layout Editor* page appears.
   HINT: For more information, please refer to the *Opening the Layout Editor section* on page 105.

NOTE: If you are copying a PDF report template, open the PDF Layout Editor.



2. Click *Copy Template to Here.*
   The *Import/Copy a Template* page appears.



3. Select the template to copy.
4. In the *Template Name* text box, type a name for the template.

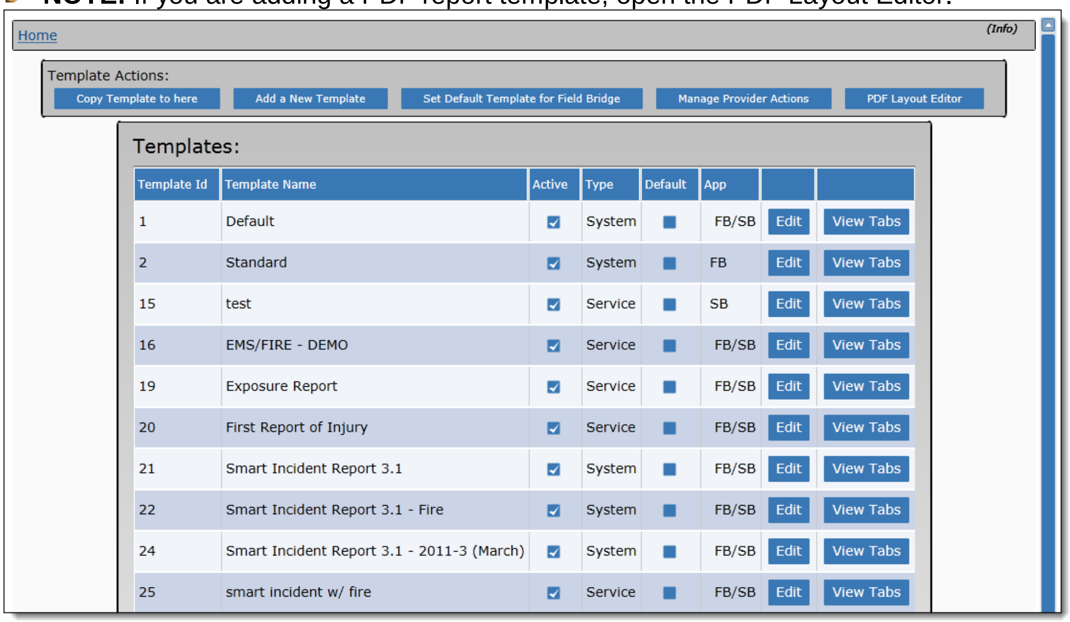
5. Click *Import Selected Template.*
   A confirmation dialog box appears.
6. Click *OK.*
   A copy of the template is created and the *Import/Copy a Template* window closes.

5.9 Adding a New Template

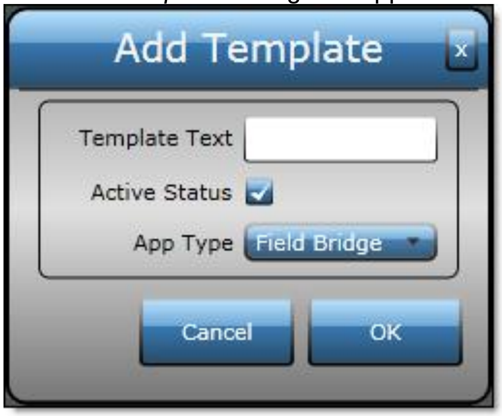
If necessary, you can add a new template with no content included. From there, you can edit the template to add tabs, panels and fields.

ImageTrend recommends that you begin by copying an existing template rather than starting from scratch; this prevents you from needing to add every single tab, panel and field individually. This is frequently a much more efficient way to create your own template. For more information, please refer to the *Creating a Copy of a Template* section.

1. Open the Layout Editor.
   The *Layout Editor* page appears.
   HINT: For more information, please refer to the *Opening the Layout Editor* section on page 105.
   NOTE: If you are adding a PDF report template, open the PDF Layout Editor.



2. From the top of the page, click *Add a New Template.*
   The *Add Template* dialog box appears.



3. In the *Template Text* text box, type the name of the new template.
4. To set this template as active and available for use, ensure that the *Active Status* checkbox is selected.
   OR
   To set this template as inactive and not available for current use, deselect the *Active Status* checkbox.
   HINTS:
   When you initially create a new template, we recommend that you mark it as inactive until you are finished building the template.
   You can change the active status of a template at any time from the *Edit* button.
5. From the *App Type* drop down menu, select which application should be able to use this template.
   HINT: If you are creating a PDF report template, *PDF Layout Editor* must be selected.
6. When finished, click *OK.*
   A confirmation dialog box appears.
7. To create the template, click *OK.*
8. Continue by editing the template to add tabs, panels and fields.

5.10 Changing a Run Form Template to a PDF Template

If needed, you can change a run form template to a PDF report template. This method is not recommended, as not all fields will display correctly when changed from the interactive run form template to a static PDF template, but it can be useful if you review the fields included to make sure they display appropriately.

WARNING: If you do choose to change a run form template to a PDF report template, make sure you are working with a copy of the run form template. You will not be able to change the template back to a run form template once you change it.

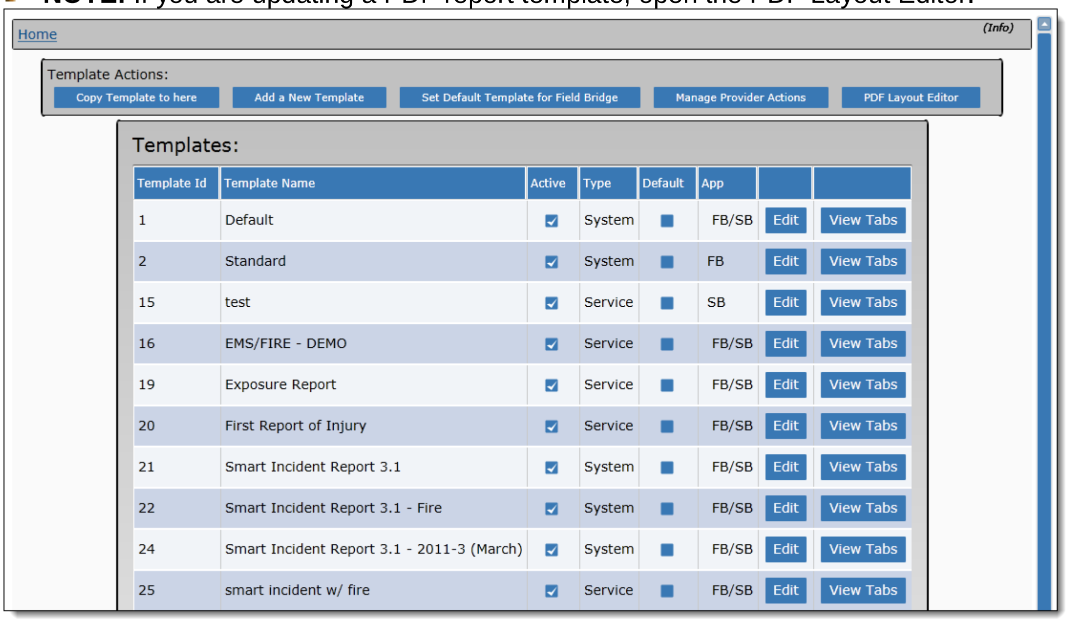
1. Open the Layout Editor.
   HINT: For more information, please refer to the *Opening the Layout Editor* section on page 105.
   NOTE: Do not open the PDF Layout Editor; you will need to work with the run form template.
2. Locate a copy of the run form template you want to turn into a PDF report template.
   WARNING: If you do choose to change a run form template to a PDF report template, make sure you are working with a copy of the run form template. You will not be able to change the template back to a run form template once you change it.

3. For the run form copy, click *Edit.*
   The *Edit Template* window appears.
4. From the *App Type* drop down menu, select *PDF Layout Editor.*
5. Click *OK.*
   The *Edit Template* window closes and the template is removed from the run form Layout Editor and moved to the PDF Layout Editor.

5.11 Editing the Name of a Template

Using the Web-based system, administrators can change the name of an existing dynamic run form or PDF report template if necessary.

1. Open the Layout Editor.
   The *Layout Editor* page appears.
   HINT: For more information, please refer to the *Opening the Layout Editor* section on page 105.
   NOTE: If you are updating a PDF report template, open the PDF Layout Editor.



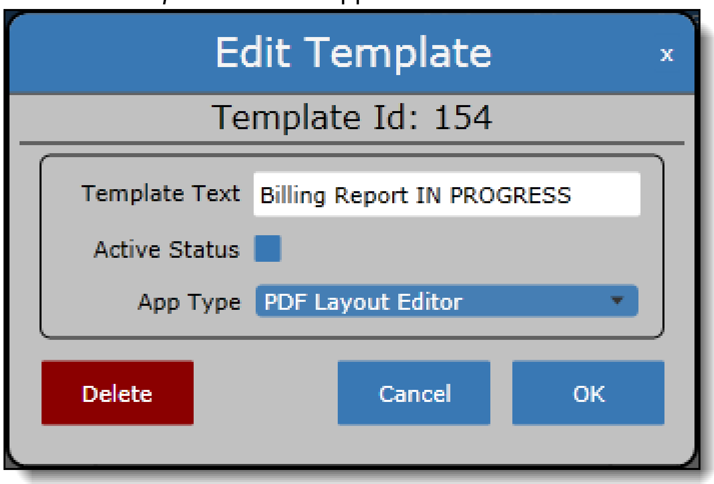
2. For the desired template, click *Edit.*
   The *Edit Template* dialog box appears.

3. In the *Template Text* text box, type the desired name for the template.

4. Click *OK.*
   The name is changed.

5.12 Changing the Status of a Template

At any point, you can change the status of a specific template to mark it as inactive or active. The status of a template is what determines whether users can see it in their list of reports to print or run forms to fill out; active templates will be available to users, and inactive templates will not.

1. Open the Layout Editor.
   The *Layout Editor* page appears.
   HINT: For more information, please refer to the *Opening the Layout Editor* section on page 105.
   NOTE: If you are updating a PDF report template, open the PDF Layout Editor.
2. For the template you want to update, click *Edit.*
   The *Edit Template* window appears.
   

3. To indicate that this report is currently active and available for users, ensure that the *Active Status* checkbox is selected.
   OR
   To indicate that this report is currently inactive and not yet available for users, deselect the *Active Status* checkbox.
   HINT: We recommend that you do not mark a template as active until you are finished building it.
4. Click *Save.*
   The changes are saved.

5.13 Adding a Tab

If necessary, you can add a new tab to any run form or PDF report template.

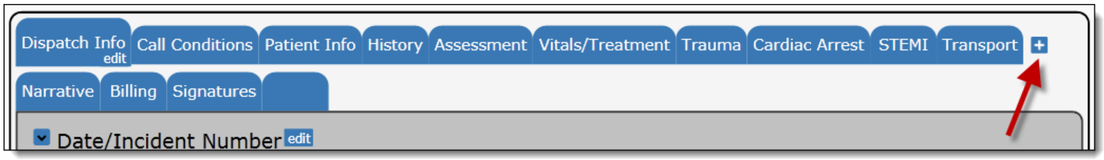
In a PDF report template, a tab will begin a page break. You can set up a new tab wherever you want to ensure that a page break will be placed within the report.

1. Open the Layout Editor.
   The *Layout Editor* page appears.
   HINT: For more information, please refer to the *Opening the Layout Editor* section on page

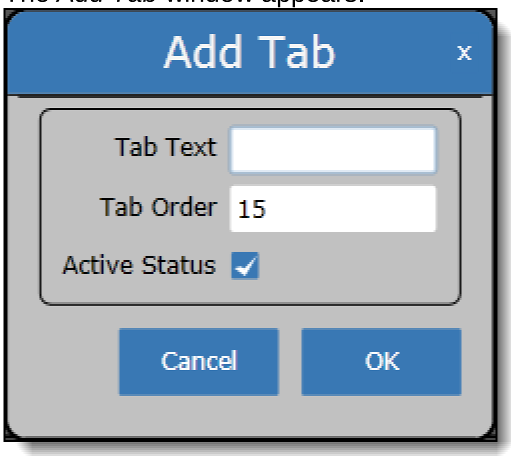
105.

NOTE: If you are updating a PDF report template, open the PDF Layout Editor.

2. For the template you want to edit, click the *View Tabs* button.
   A list of tabs for the run form appears.
3. Click the *Add Tab* icon.



The *Add Tab* window appears.



4. In the *Tab Text* text box, type the name of the tab.
5. In the *Tab Order* text box, type a number corresponding to the order that this tab should appear in the list of tabs (e.g., 1 for first).
6. To set this tab as active and visible, ensure that the *Active Status* checkbox is selected.
   OR
   To set this tab is inactive and not visible on this run form, deselect the *Active Status* checkbox.
   HINTS:
   - Regardless of its status, this tab will not be displayed anywhere if the template is inactive. However, if you are working with an active template, this setting will keep the tab and any included panels and fields from being displayed and printed when the report is generated.
   - Keep in mind that if you are working with an inactive template and you also mark this tab as inactive, you will need to activate both the template AND the tab when you want to make the report available to providers.
   - It can be a good idea to mark a tab as inactive until you are finished with it, if the run form you are adding it to is currently active and being used. This will allow you to finish creating and testing the new tab before providers start using it to document.
7. When finished, click *OK.*
   The tab is added with no panels or controls included.

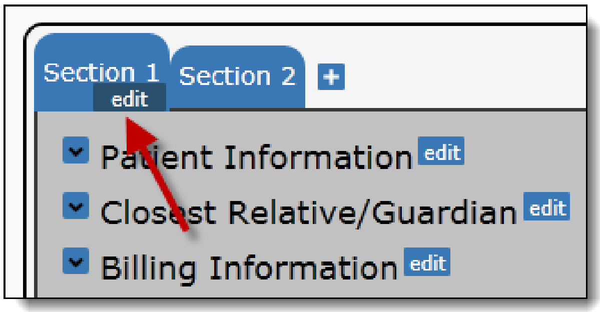
5.14 Updating the Details of a Tab

You can update the name or order of any tab in a template, as well as selecting whether that tab is active or inactive.

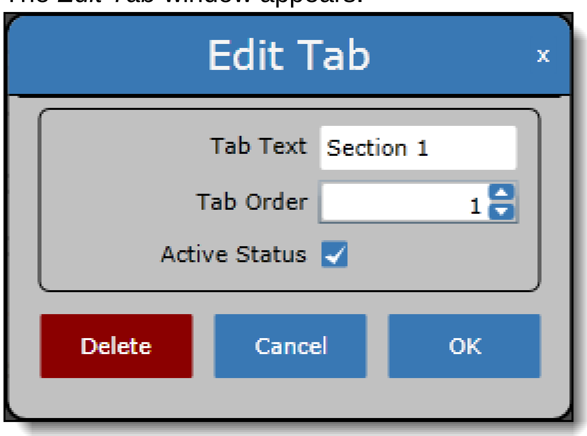
1. Open the Layout Editor.

   HINT: For more information, please refer to the *Opening the Layout Editor* section on page 105.

   NOTE: If you are updating a PDF report template, open the PDF Layout Editor.
2. For the template you want to add a tab to, click the *View Tabs* button.
   A list of existing tabs for the template appears.
3. Select the tab you want to update.
   The panels for that tab are displayed.
4. Click the *Edit* option for the tab.



The *Edit Tab* window appears.



5. In the *Tab Text* text box, update the name of the tab as needed.
6. To change the order of the tab in relation to other tabs in the template, type a number corresponding to the desired order (e.g., 1 for first).

7. To indicate that this tab is currently active and should be visible if the report is printed, ensure that the *Active Status* checkbox is selected.
   OR
   To keep this tab hidden if the report is printed, deselect the *Active Status* checkbox.

   HINTS:

   - Regardless of its status, this tab will not be displayed anywhere if the template is inactive. However, if you are working with an active template, this setting will keep the tab and any included panels and fields from being displayed and printed when the report is generated.
   - Keep in mind that if you are working with an inactive template and you also mark this tab as inactive, you will need to activate both the template AND the tab when you want to make the report available to providers.

- It can be a good idea to mark a tab as inactive until you are finished with it, if the run form you are adding it to is currently active and being used. This will allow you to finish creating and testing the new tab before providers start using it to document.

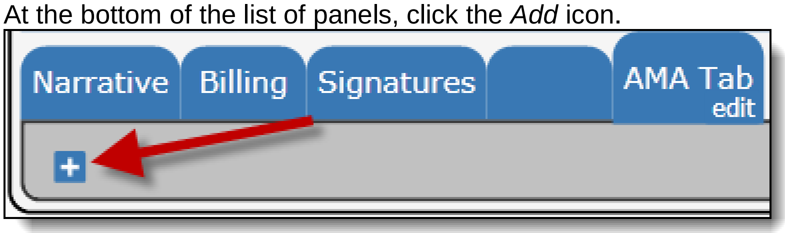
8. Click *OK.*
   The changes to the tab are saved.

5.15 Adding a Panel to a Template

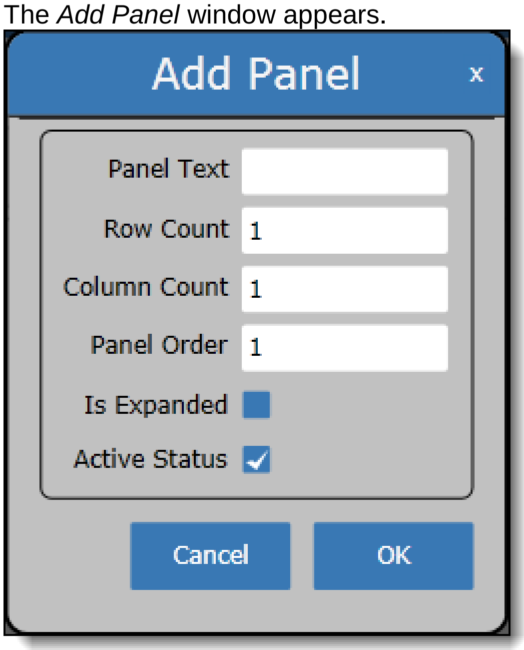
You can add a new panel to any tab in a template. When adding a panel, you may want to have some idea of how many controls you would like to include so that you can set a number of rows and columns for the panel.

For reports, a panel will appear as a new section with a header.

1. Open the Layout Editor.
   The *Layout Editor* page appears.
   HINT: For more information, please refer to the *Opening the Layout Editor* section on page 105.
   NOTE: If you are updating a PDF report template, open the PDF Layout Editor.
2. For the template you want to edit, click the *View Tabs* button.
   A list of tabs for the run form appears.
3. Click the name of the tab to which you want to add a panel.
4. At the bottom of the list of panels, click the *Add* icon.



   The *Add Panel* window appears.



5. In the *Panel Text* text box, type the name of the panel.
   NOTE: This is the text that will appear in the header for this panel.

6. In the *Row Count* and *Column Count* text boxes, type the number or rows and columns wide and tall this panel should appear.
7. To determine where this panel should appear in relation to the other panels in the tab (e.g., first, second), in the *Panel Order* text box, type this panel's position.
8. To indicate whether this panel should be open or closed by default when the tab is opened, select (open) or deselect (closed) the *Is Expanded* checkbox.
   NOTE: This option is not available for report templates. All panels will be expanded,
9. To set the background color of the header for this panel, from the *Panel Color* drop down menu, select the appropriate color.
   NOTES:
   This option is available only from report templates.
   You can also set the background color for all panel headers in the *Edit Theme* section for the report; any settings applied to individual panels as outlined in this step will be applied instead of the report-wide theme.
10. To indicate that this panel should currently be available on the run form, select the *Active Status* checkbox.
    OR
    To indicate that this panel should be saved but not visible on the run form, deselect the *Active Status* checkbox.
    HINTS:
    Regardless of its status, this panel will not be displayed anywhere if the template or tab containing it is inactive. However, if you are working with an active template, this setting will keep the panel and any included fields from being displayed and printed when the report is generated. Keep in mind that if you are working with an inactive template and you also mark this panel as inactive, you will need to activate both the template AND the panel when you want to make the report available to providers.
11. When finished, click *OK.*
    The panel is added.
    HINT: After adding the panel, there will be no content. You will need to add controls to see form content within the panel.

5.16 Updating Existing Panels

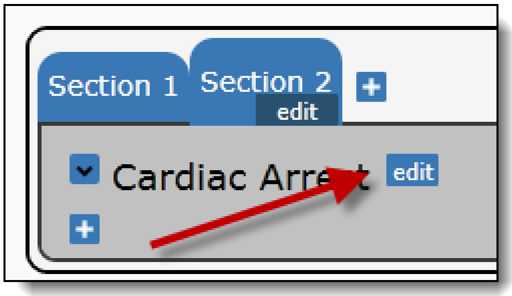
You can edit or move existing panels within your template as needed. This section will explain how to update the features associated with the panel itself (e.g., name, rows and columns, placement), not how to work with the controls included in the panel.

Editing Panel Details

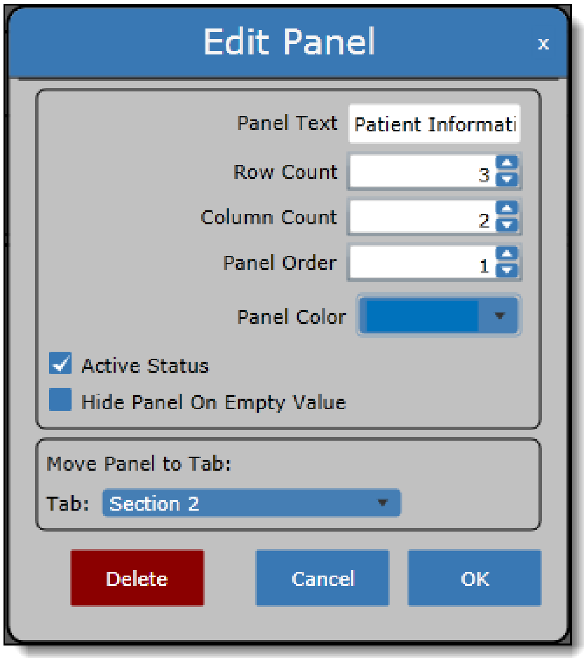
When you edit the details of a panel, you can change its name, the number of rows and columns included in the panel, its order in relation to the other panels in the tab and its status (i.e., active or inactive).

1. Open the Layout Editor.
   HINT: For more information, please refer to the *Opening the Layout Editor* section on page 105.
   NOTE: If you are updating a PDF report template, open the PDF Layout Editor.
2. For the template you want to add a tab to, click the *View Tabs* button.
   A list of existing tabs for the template appears.
3. Click the tab containing the panel you want to update.
   The tab appears.

4. For the panel you want to update, click the *Edit* button.



The *Edit Panel* window appears.



5. To change the header of the panel, in the *Panel Text* text box, type the appropriate name.
6. In the *Row Count* and *Column Count* text boxes, update the number or rows and columns that should appear in this panel, as needed.
7. To change the order that this panel should appear in relation to the other panels in the tab, type a number associating to the desired position (e.g., type 1 if this panel should appear first).
8. To set the background color of the header for this panel, from the *Panel Color* drop down menu, select the appropriate color.

   NOTES:

   This option is available only from report templates.

   You can also set the background color for all panel headers in the *Edit Theme* section for the report; any settings applied to individual panels as outlined in this step will be applied instead of the report-wide theme.
9. To mark that this panel is active, ensure that the *Active Status* checkbox is selected.

   OR

   To keep this panel hidden from users but available for administrative reference, deselect the *Active Status* checkbox.

HINTS:

Regardless of its status, this panel will not be displayed anywhere if the template or tab containing it is inactive. However, if you are working with an active template, this setting will keep the panel and any included fields from being displayed and printed when the report is generated.

Keep in mind that if you are working with an inactive template and you also mark this panel as inactive, you will need to activate both the template AND the panel when you want to make the report available to providers.

10. To hide this panel if none of the fields have data for the report being printed, select the *Hide Panel On Empty Value* checkbox.

    NOTE: This option is available only for PDF report templates.

11. To indicate whether this panel should be open or closed by default when the tab is opened, select (open) or deselect (closed) the *Is Expanded* checkbox.

    NOTE: This option is available only for run form templates.

12. When finished, click *OK.*

    The changes are saved.

Moving a Panel to a Different Tab

You can move an entire panel to a different tab in the report if needed. Please note that after you move a panel, you may want to check the new tab to make sure the panel appears in the correct order.

1. Open the Layout Editor.

   HINT: For more information, please refer to the *Opening the Layout Editor* section on page 105.

   NOTE: If you are updating a PDF report template, open the PDF Layout Editor.

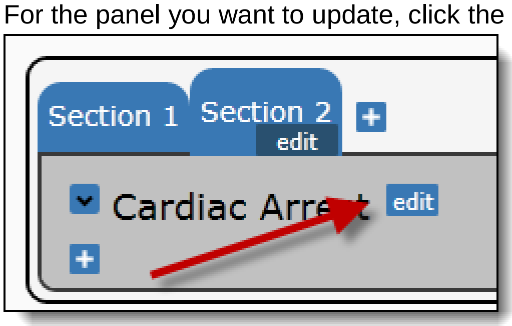
2. For the template you want to add a tab to, click the *View Tabs* button.

   A list of existing tabs for the template appears.

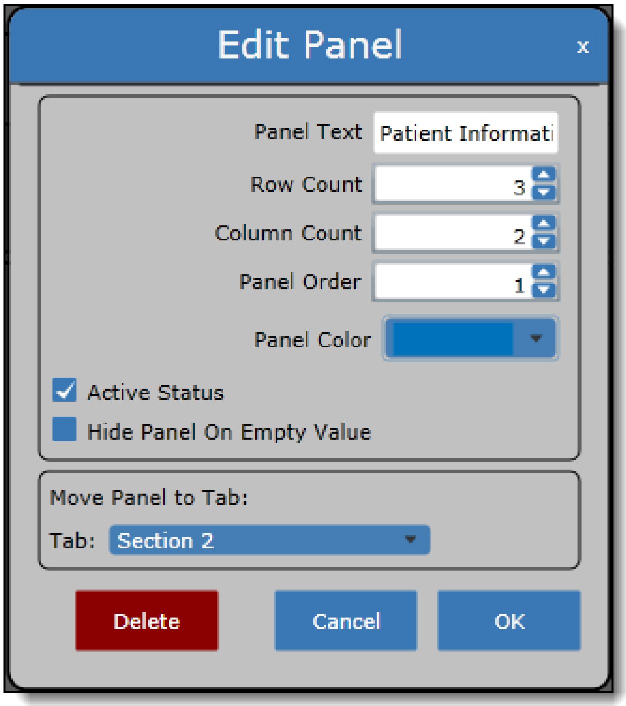
3. Click the tab containing the panel you want to update.

   The tab appears.

4. For the panel you want to update, click the *Edit* button.



The *Edit Panel* window appears.



5. From the *Move Panel to Tab* drop down menu, select the tab that this panel should be moved to.
6. Click *OK.*
   The panel is moved.

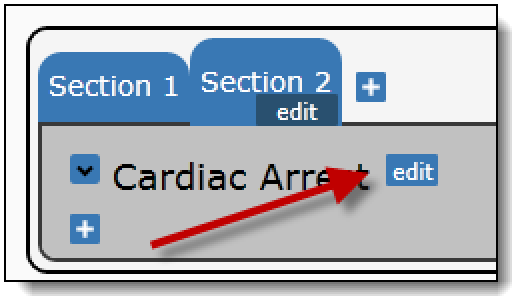
Hiding a Panel with No Data

NOTE: This option is available only for PDF report templates.

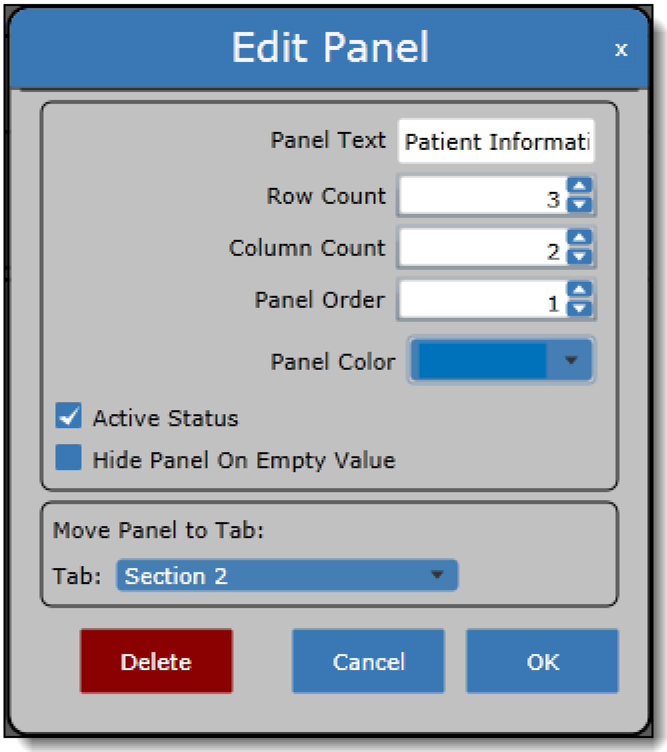
You can set panels to be hidden on printed reports if there is no data in any of the fields; for example, if you have a panel for cardiac arrest data, you could set it to not print any time the call you are printing a report for has no cardiac arrest data.

1. Open the PDF Layout Editor.
   HINT: For more information, please refer to the *Opening the Layout Editor* section on page 105.
2. For the template you want to add a tab to, click the *View Tabs* button.
   A list of existing tabs for the template appears.
3. Click the tab containing the panel you want to update.
   The tab appears.

4. For the panel you want to update, click the *Edit* button.



The *Edit Panel* window appears.



5. To hide this panel if none of the fields have data for the report being printed, select the *Hide Panel On Empty Value* checkbox.
6. When finished, click *OK.*
   The changes are saved.

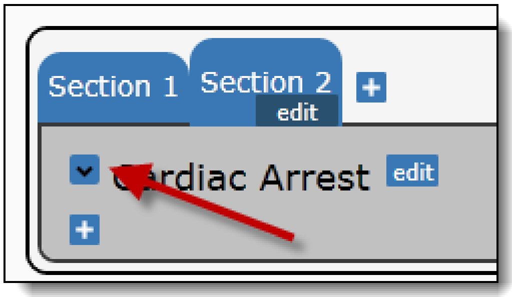
5.17 Adding a Control to a Template

You can add a new control to a template as long as there is an empty space in the panel where you want to add the control. If you want to add a field to a panel with no empty space, you will need to edit the panel to add additional rows and/or columns to make space for the new field.

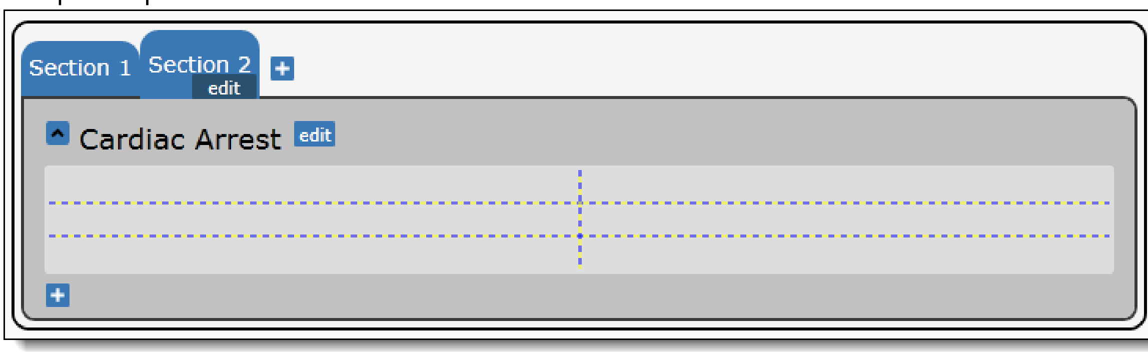
1. Open the Layout Editor.
   The *Layout Editor* page appears.
   HINT: For more information, please refer to the *Opening the Layout Editor* section on page 105.
   NOTE: If you are updating a PDF report template, open the PDF Layout Editor.

2. For the template you want to edit, click the *View Tabs* button.
   A list of tabs for the run form appears.
3. Click the name of the tab containing the panel.

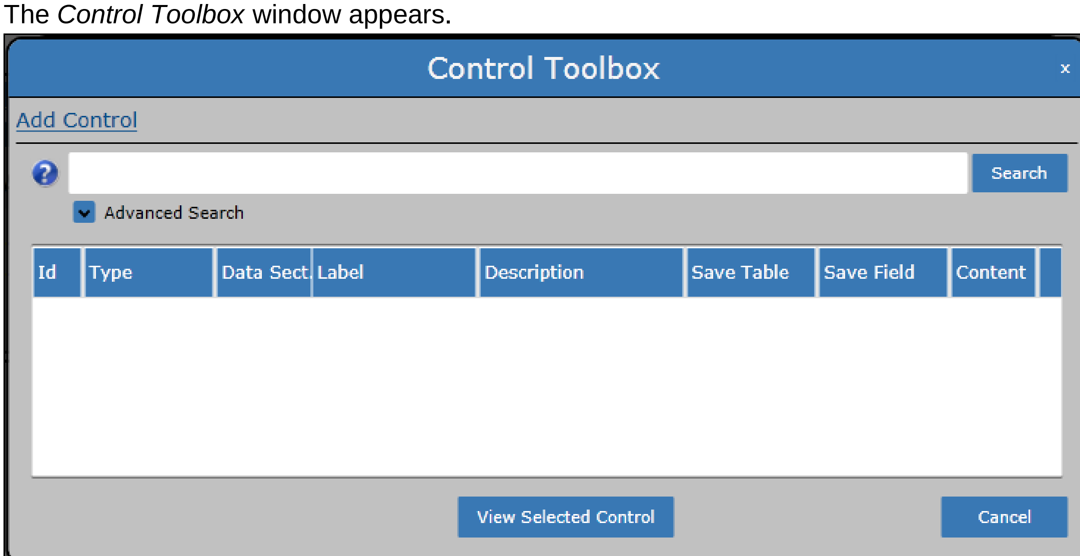
4. If necessary, to expand the panel you want to add the field to, click the *Expand* icon.



The panel opens.

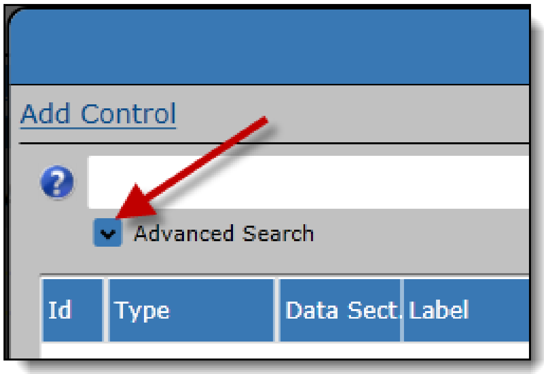


5. Hover your mouse above the empty cell you want to add the control to.
   The *Add Control* option appears.
6. Click the *Add Control* button.
   The *Control Toolbox* window appears.

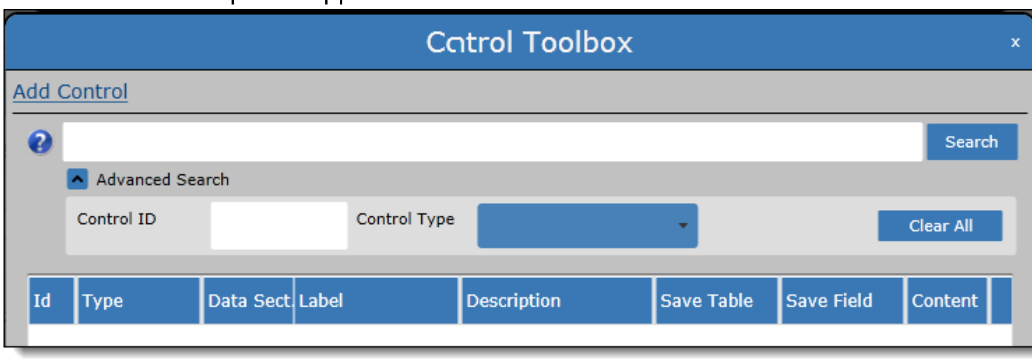


7. In the *Search* text box, type the name or part of the name of the control you want to add.
   OR
   To search by additional options,

a. Click the *Expand* icon for the advanced search options.

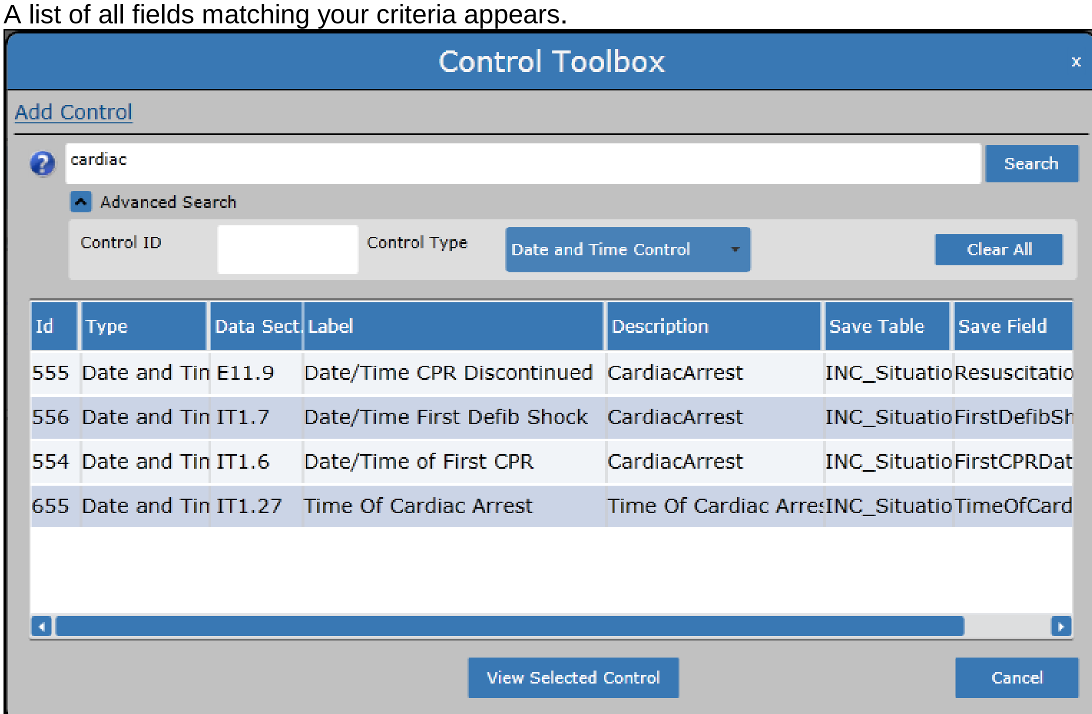


Additional search options appear.



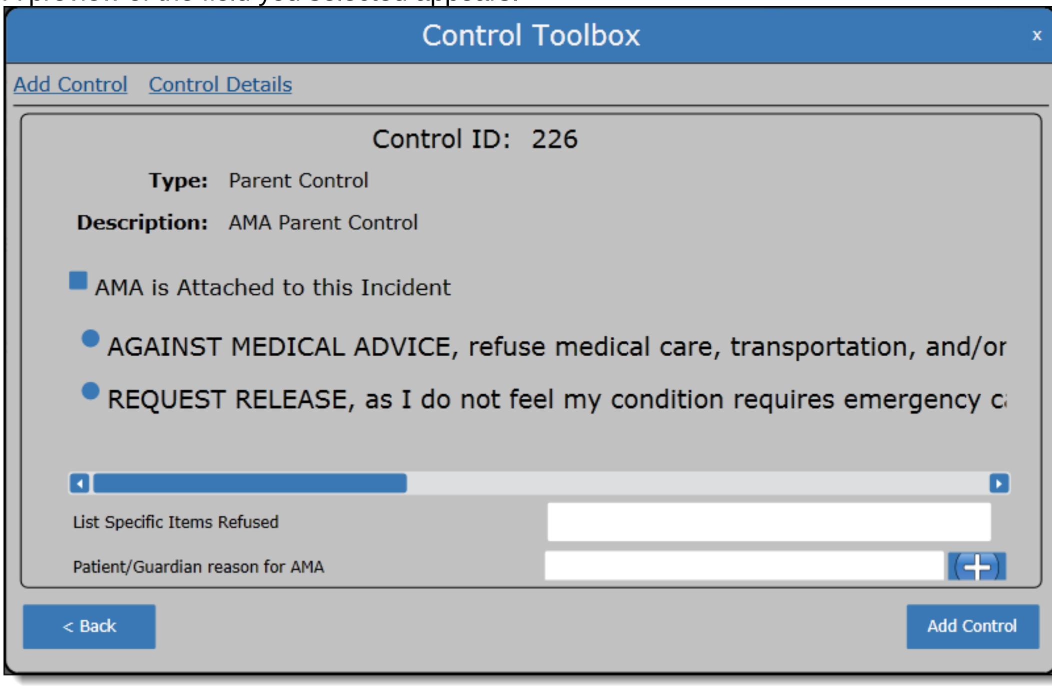
b. As needed, type a control ID or select a control type to search for.

8. Click *Search.*
A list of all fields matching your criteria appears.



9. Select the field you want to add.

10. Click *View Selected Control.*
    A preview of the field you selected appears.



11. If this is the correct field, click *Add Control.*
    The field is added to the panel.
    OR
    If this is the incorrect field,
    a. Click *Back.*
       You are returned to the *Search* page.
    b. Repeat steps 7–11 until the desired field is added.

5.18 Updating Controls

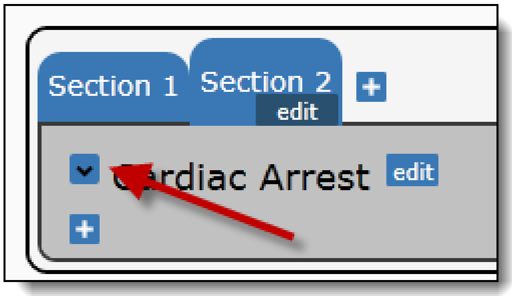
You can update controls that are already in your template as needed. This section will explain how to move controls, adjust their size or label and hide them if there is no data for the report.

Working with Parent Controls

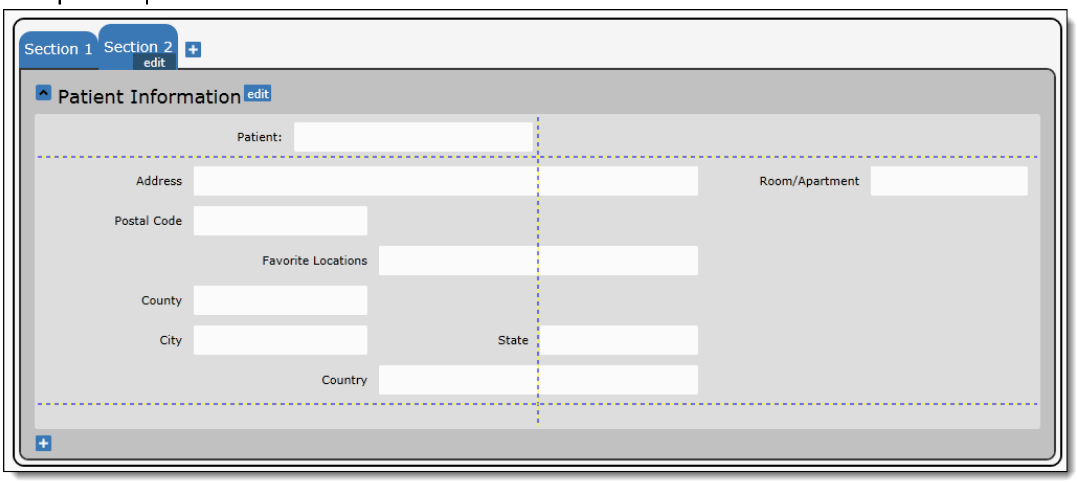
Some controls, often called "parent controls," have several sub-controls included in them. (A common example might be the Patient Address control, which contains several individual fields including the *Address, City, State* and *Zip Code* fields.) Parent controls are frequently an easy way to quickly add multiple fields that are almost always grouped together. However, if you need to edit an individual sub-control within a parent control, you will need to navigate further into the control than detailed in the following sections. This section provides details on how to navigate to a specific sub-control in a parent control.

1. Open the Layout Editor.
   HINT: For more information, please refer to the *Opening the Layout Editor* section on page 105.
   NOTE: If you are updating a PDF report template, open the PDF Layout Editor.
2. For the template you want to add a tab to, click the *View Tabs* button.
   A list of existing tabs for the template appears.

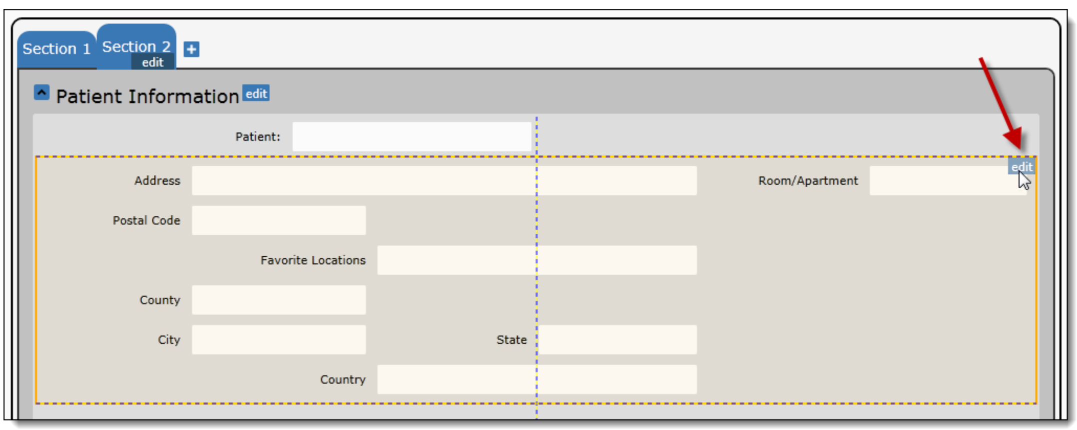
3. Click the tab containing the control you want to update.
   The tab appears.
4. If necessary, click the *Expand* icon to expand the panel containing the control.



The panel opens.

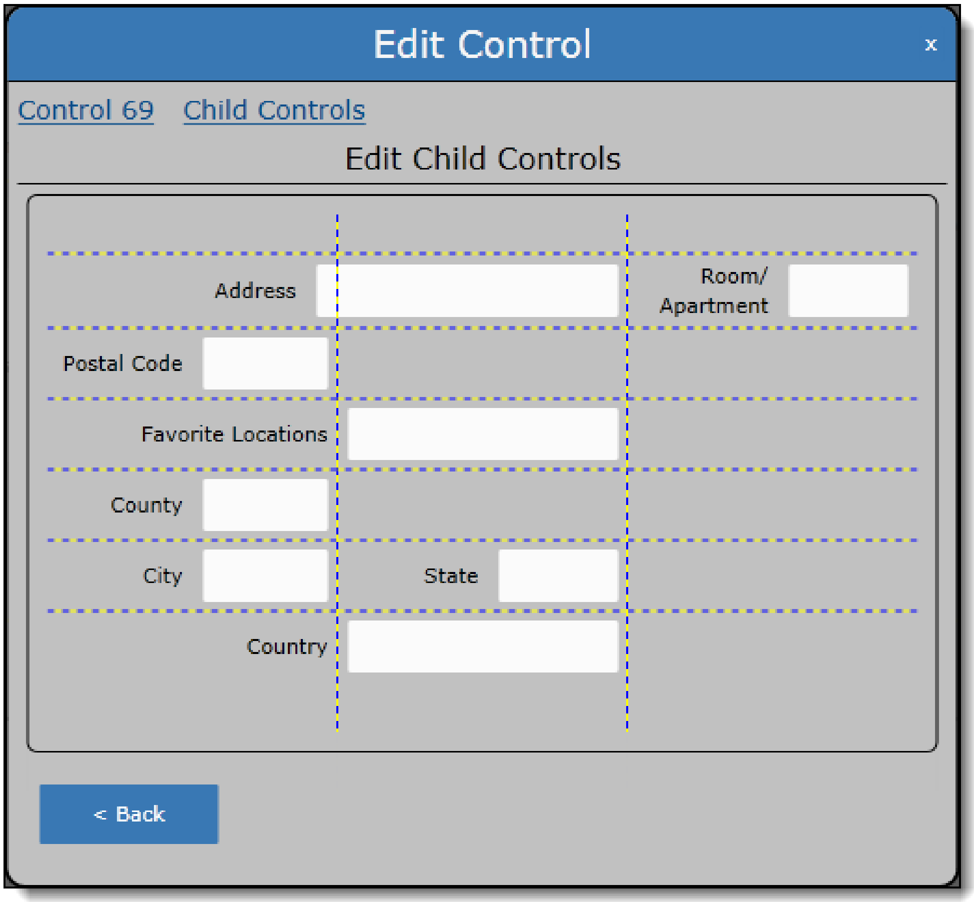


5. Hover your mouse above the parent control.
   The *Edit* button appears.
6. Click the *Edit* button.



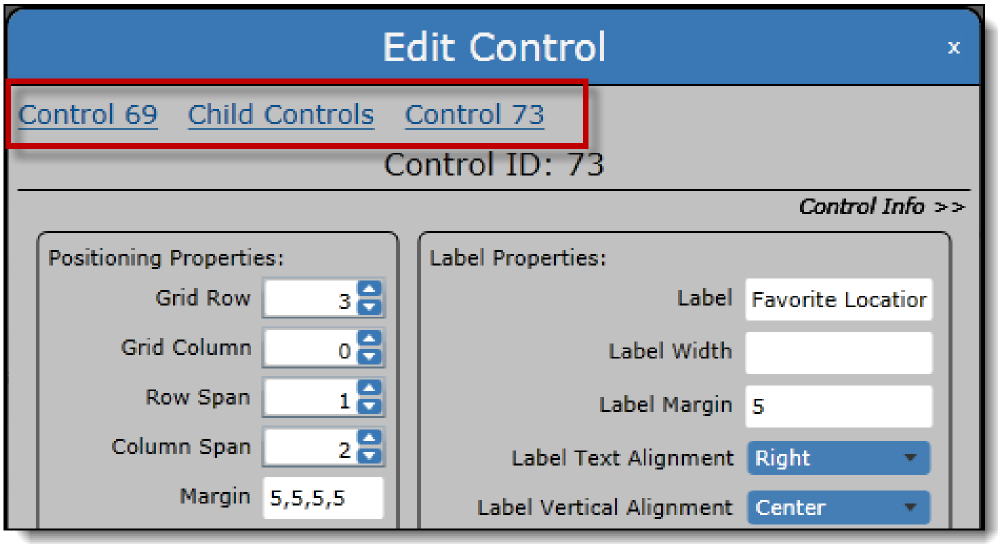
The *Edit Control* window for the parent control appears.

7. From the panel on the lower right, click *View/Edit Child Controls.*
   The *Edit Child Controls* page appears.



8. Hover your mouse above the child control you want to work with.
   The *Edit* button appears.
9. Click the *Edit* button.
   The *Edit Control* page appears for the selected control.
   HINT: As you move forward through child controls, you can jump back to a previous page using the breadcrumb menu at the top of the window. For example, here you see the *Control 69* link for the Patient Address parent control, the *Child Controls* link for the page where you viewed all the child controls, and now the *Control 73* link for the sub-control displayed here. If you navigate this way, any changes you made to the current

page will not be saved.



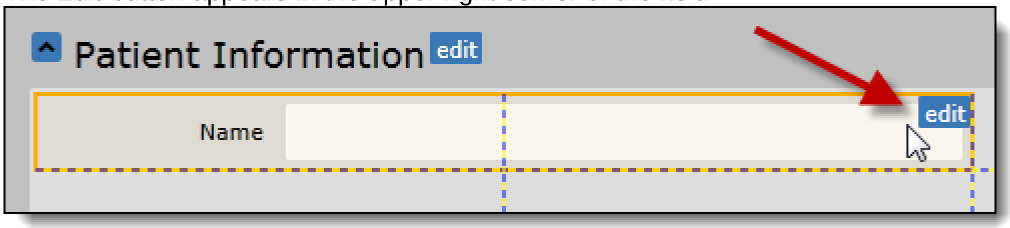
10. Make any needed changes to this child control.
11. When finished, click *Save & Back.*
    You are returned to the previous page.

Editing the Details of a Control

When editing a field, you can make changes to a variety of options including the label, size or margins of the control. Additional options are available that are specific to either run form templates or PDF report templates.

1. Open the Layout Editor.
   The *Layout Editor* page appears.
   HINT: For more information, please refer to the *Opening the Layout Editor* section on page 105.
   NOTE: If you are updating a PDF report template, open the PDF Layout Editor.
2. For the template you want to edit, click the *View Tabs* button.
   A list of tabs for the run form appears.
3. Click the name of the tab containing the control you want to edit.
4. If necessary, to expand the panel containing the field you want to edit, click the *Expand* icon.

5. Place your mouse above the field you want to edit.
   The *Edit* button appears in the upper right corner of the field.



6. Click the *Edit* button for the field.
   The *Edit Control* dialog box appears.

7. To change the field's positioning, in the *Grid Row* and *Grid Column*, select the desired column and row number.
8. To change the number of columns or rows tall or wide a field covers, in the *Row Span* and *Column Span* sections, select the desired number of columns wide or tall the field should be.
9. To set a margin around the field, in the *Margin* text box, type the number of pixels that should surround the field on each side.
   HINT: If you enter one number, that number of pixels will be applied on all sides of the field. If you enter two numbers, the first number will be applied to the left and right of the label and the second number will be applied to the top and bottom of the label. If you enter four numbers, the numbers will be applied in order as top, right, bottom, left.

10. To set a height for the field (in pixels), in the *Control Height* text box, type the desired number of pixels tall the field should be.
11. To set a maximum number of pixels wide that a field can be, in the *Control Max Width* text box, type the maximum number of pixels wide the field can be.

    NOTE: If the field is not this wide, it will take up as much space as it needs, and will not stretch to fit this number.
12. To change the text labeling the field, in the *Label Properties* section, in the *Label* text box, type the new desired text.
13. To change the amount of space that should be allowed for the label, in the *Label Width* text box, type the number of pixels wide the label should appear to be.
14. To change the amount of space surrounding the label, in the *Label Margin* text box, type the number of pixels that should be used as a margin.

    HINT: If you enter one number, that number of pixels will be applied on all sides of the field. If you enter two numbers, the first number will be applied to the left and right of the label and the second number will be applied to the top and bottom of the label. If you enter four numbers, the numbers will be applied in order as top, right, bottom, left.
15. To change the alignment of the label's text within the space for the label, from the *Label Text Alignment* drop down menu, select the desired alignment.
16. To change the alignment of the space allowed for the label within the space for the field, from the *Label Vertical Alignment* and the *Label Horizontal Alignment* drop down menus, select the alignment of the label within the grid.
17. To select whether the label should be positioned to the left of the field or on top of the field, from the *Label Position* drop down menu, select the desired position.
18. To set this field as active and currently available in the run form, in the *Other Properties* section, select the *Active Status* checkbox.

    OR

    To set this field as inactive and not visible to users, in the *Other Properties* section, deselect the *Active Status* checkbox.
19. To hide this control if there is no content for it when the report is printed, select the *Hide Control on Empty Value* checkbox.

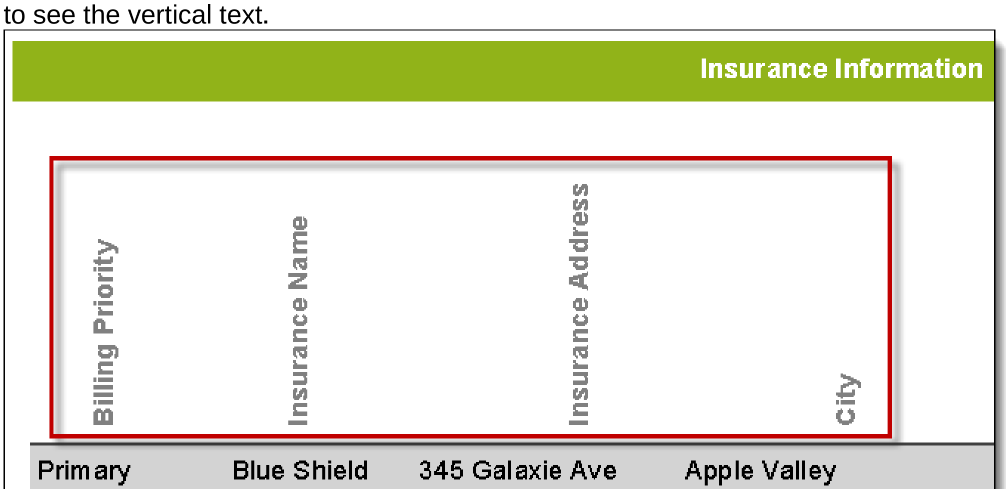
    NOTE: This option is available only for PDF report templates.
20. To change the orientation of the label so that the text displays horizontally, in the *Other Properties* section, select the *Rotate Column Header* checkbox.

    NOTES:

    This option is only available for PDF report templates.

    This option will not be available for all fields.

    If you select this option, you will not be able to see the changes when you are working with the template. You will need to preview the template or open the actual report in order to see the vertical text.



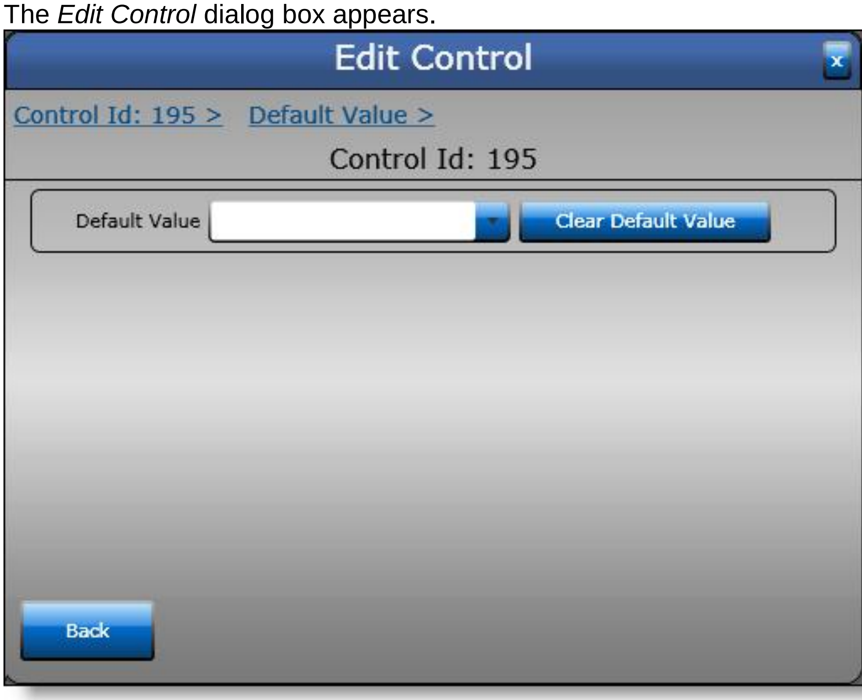
21. To add content to a field with non-editable content (e.g., the text on a button or a single checkbox), in the *Content* text box, type the content.

    NOTE: This option is not available in all fields and is most often available for run form templates.

    HINT: Be careful about which field you add content to, as you may accidently add text over a field and prevent the user from seeing the area in which they should respond.
22. To add a value that should be selected by default,

    NOTES:
    This option is only available for run form templates.
    Not all fields will allow you to select a default value. If you do not see the *Add Default Value* button, this option is not available.

    a. Click *Add Default Value.*
       The *Edit Control* dialog box appears.



    b. Select the desired default value.

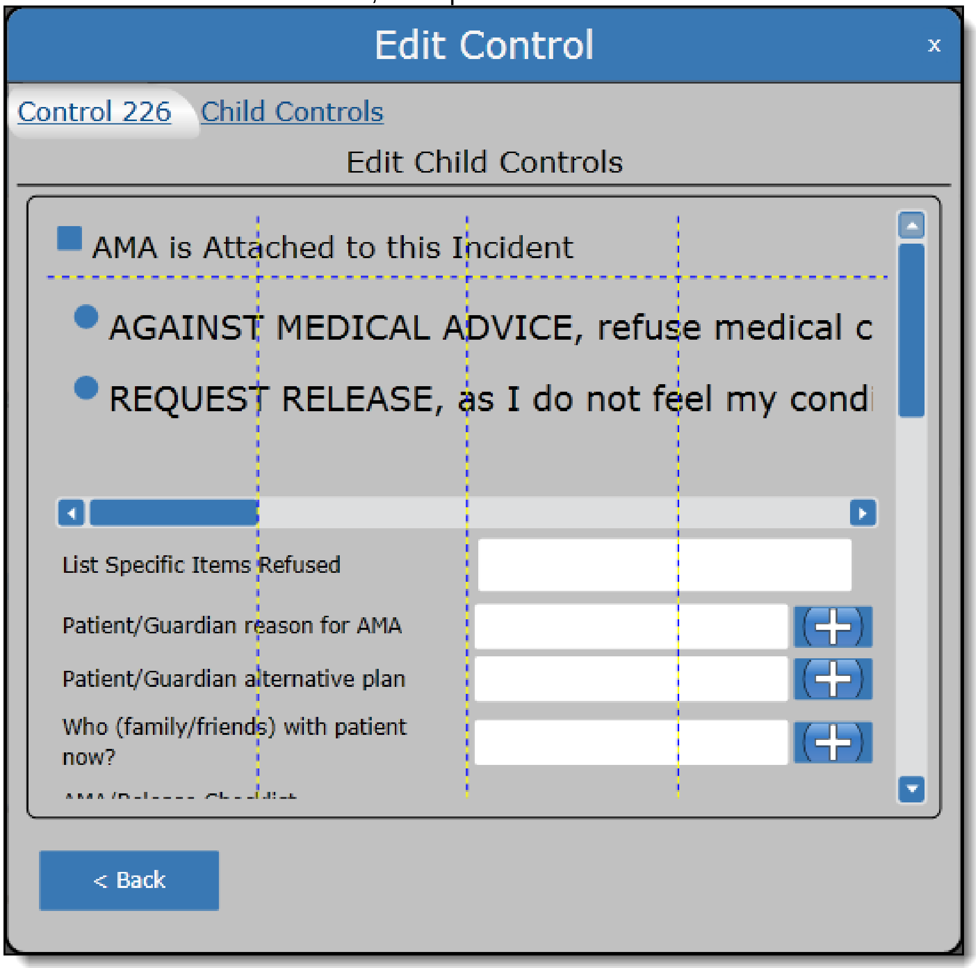
       NOTE: Depending on the type of field you are setting a default value for, you may see a different page than the one pictured above.
    c. Click *Back.*
23. To enable a spell check feature for this field, in the *Other Properties* section, select *Spell Check On.*

    NOTES:
    This option is available only for run form templates.
    Not all fields will allow you to enable spell check. If you do not see the *Spell Check On* checkbox, this option is not available.
24. To change the number of rows or columns within this field, in the *Other Properties* section, use the *Row Count* and *Column Count* fields to select the desired number of rows or columns in the field.

    NOTE: Not all fields contain multiple columns; this is commonly associated with parent controls. If you do not see the *Row Count* and *Column Count* text boxes within the *Other Properties* section, this option is not available.
25. If this field contains another control that you would like to work with,

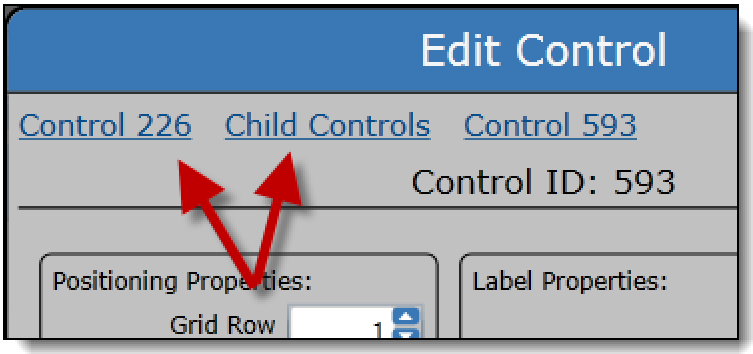
    a. Click *View/Edit Child Controls.*
       The panel is previewed in the *Edit Control* dialog box.

NOTE: Not all fields have additional fields within them. If you do not see the *View/Edit Child Controls* button, this option is not available.

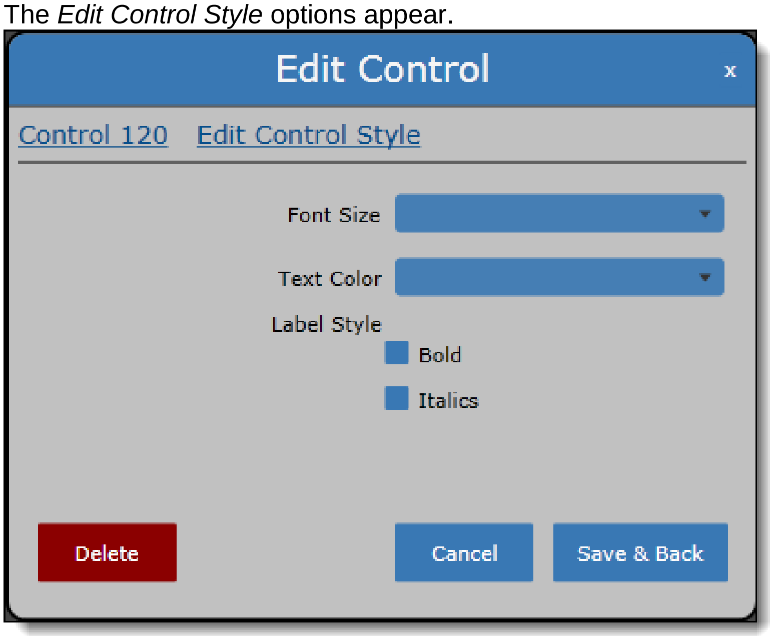


b. Hover your mouse over the control you want to edit until the *Edit* button appears.
c. Click the *Edit* button for that field.
   Information for the selected field appears.
d. Repeat steps 7–24 until this field is configured as desired.
e. When finished, click *Save & Back.*
   OR
   To move back to the previous pages without saving, click the appropriate page from the top of the dialog box.

HINT: As you continue to click through the fields without going back, the pages and controls you see will be displayed in order in a "breadcrumb trail" at the top of the dialog box. You can click a link here to jump back to a previous page at any time. When you do this, all links listed after the one you click will be cleared.



26. To update the formatting of just this control,
   NOTE: This option is only available for PDF report templates.
   a. Click *Control Style.*
      The *Edit Control Style* options appear.



   b. From the *Font Size* and *Text Color* drop down menus, select the appropriate font size and color for the label for this control.
      NOTE: These settings will override the any report-wide formatting. For example, if you have the theme for the report set to display black text but you set this control to display in red, this control's label will be red instead of black.
   c. To make the label for this control bold or italicized, select the *Bold* or *Italics* checkbox.
27. When finished with all editing, click *Save & Close.*

Moving a Control

There are several ways you can move a control within a panel. When you want to move a control, there must always be a blank space to move the control to. If there is not a blank space, you will need to remove an existing control or add row and/or columns to the panel to make room.

1. Open the Layout Editor.
   The *Layout Editor* page appears.
   HINT: For more information, please refer to the *Opening the Layout Editor* section on

page 105.

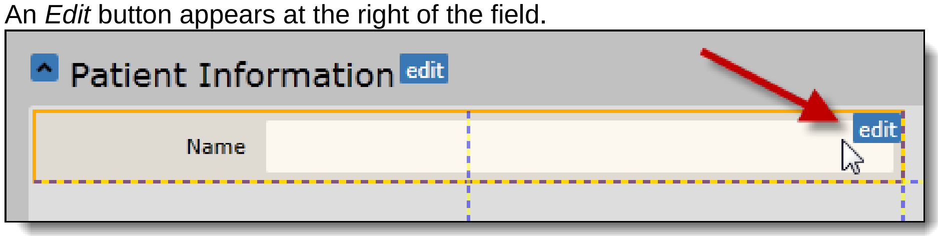
NOTE: If you are updating a PDF report template, open the PDF Layout Editor.

2. For the template you want to edit, click the *View Tabs* button.
   A list of tabs for the run form appears.
3. Click the name of the tab containing the panel.
4. If necessary, to expand the panel containing the field you want to move, click the *Expand* icon.

5. To move the field by dragging it to the new location,
   a. Click and hold the field to move.
   b. Drag your mouse over the empty space for the field and release the mouse.
      HINT: Fields must be moved to empty spaces. To switch the position of two fields, you will need to create a new space for the first field to go while moving the second field, and remove the extra space after the fields are in place.

   OR

   To move the field by entering the desired position on the grid,
   a. Hover your mouse above the desired field.
      An *Edit* button appears at the right of the field.



The *Edit Control* dialog box appears.

b. To change the field's positioning, in the *Grid Row* and *Grid Column*, select the desired column and row number for where this field should appear (e.g., 3rd row in the second column).
c. Click *Save & Close.*
The field is moved

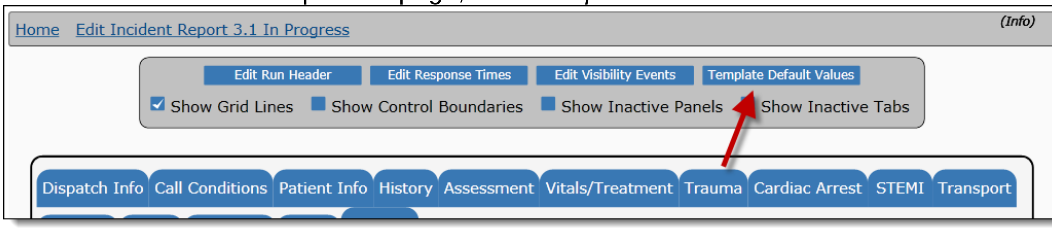
Setting Default Values for a Run Form Template

NOTE: This option is available only for controls on run form templates.

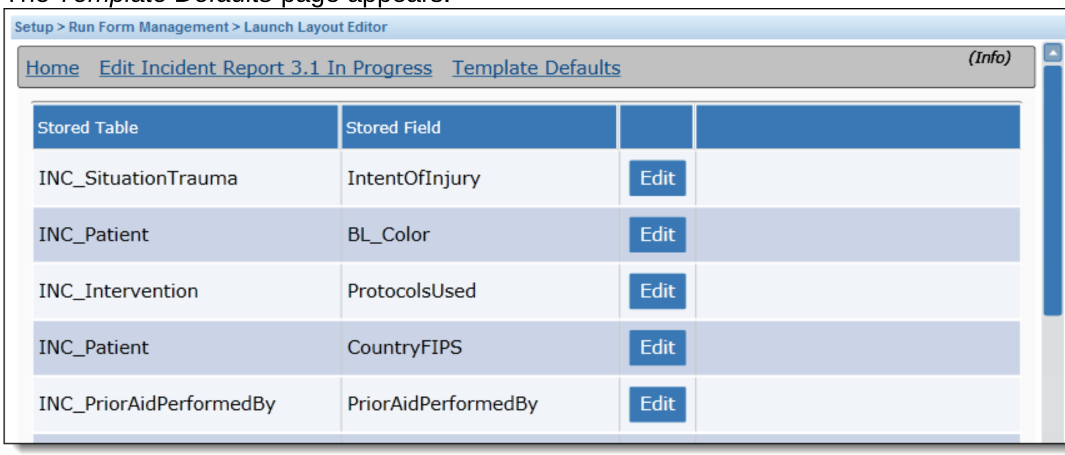
Default values will be automatically selected on run forms using the template that the value was set up in. You can assign default values individually by editing specific fields, or you can set defaults from a list of all fields that can contain default values. This section will examine how to set default values from a list of fields.

1. Open the Layout Editor.
   The *Layout Editor* page appears.
   HINT: For more information, please refer to the *Opening the Layout Editor* section on page 105.
2. For the template you want to edit, click the *View Tabs* button.
   A list of tabs for the run form appears.

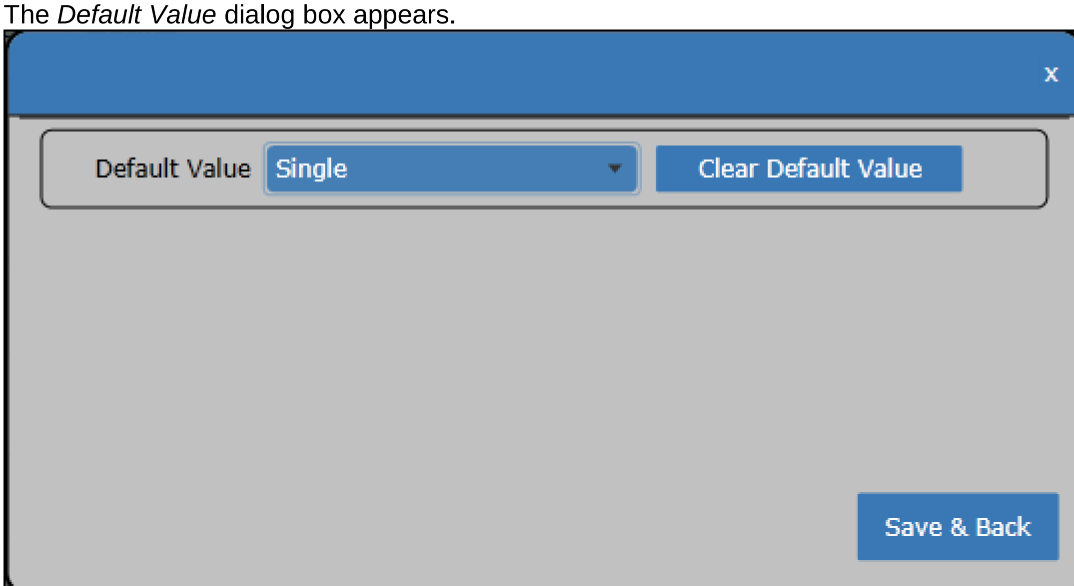
3. From the toolbar at the top of the page, click *Template Default Values.*



The *Template Defaults* page appears.



4. For the field you want to change default values for, click *Edit.*
The *Default Value* dialog box appears.



5. Select the desired default value.
OR
To remove a default value that is currently assigned, click *Clear Default Value.*
6. When finished, click *Save & Back.*
The changes are saved.

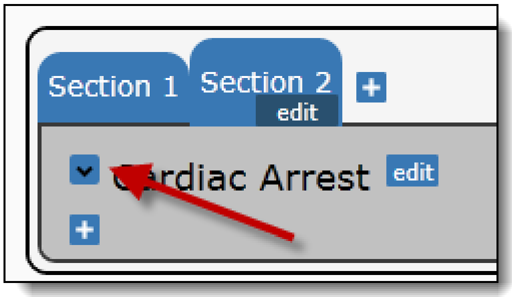
Hiding a Control with No Data

NOTE: This option is available only for controls on PDF report templates.

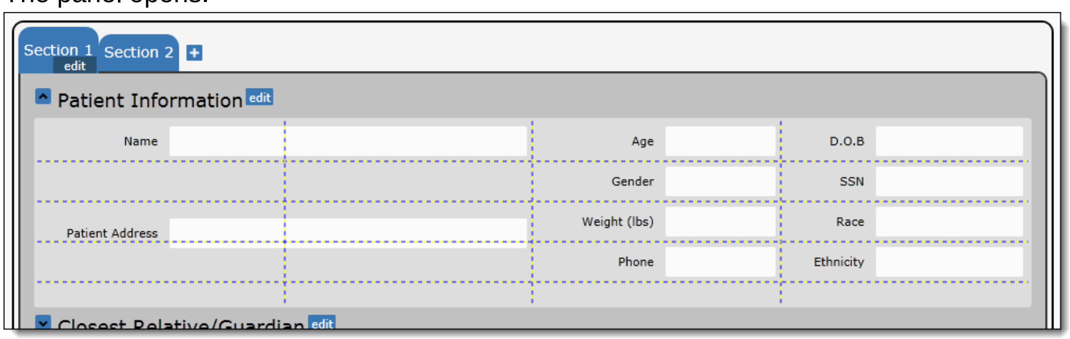
You can set controls to be hidden on printed reports if there is no data for them; for example, if you have a the *Cardiac Arrest Time* control in your report, you could set it to not print any time the call you are printing a report for has does not have a cardiac arrest time recorded.

1. Open the PDF Layout Editor.

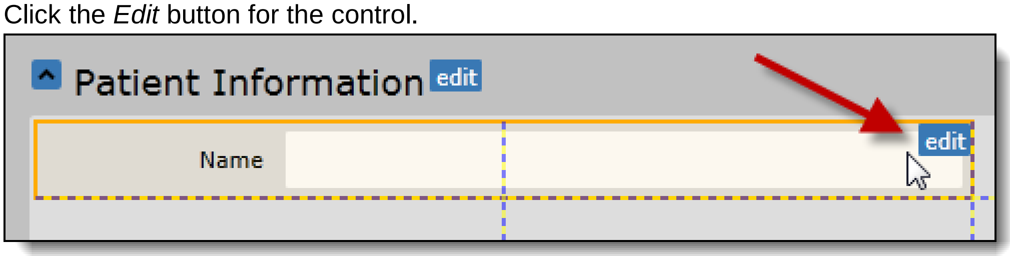
   HINT: For more information, please refer to the *Opening the Layout Editor* section on page 105.
2. For the template you want to add a tab to, click the *View Tabs* button.
   A list of existing tabs for the template appears.
3. Click the tab containing the control you want to update.
   The tab appears.
4. If necessary, click the *Expand* icon to expand the panel containing the control.

   The panel opens.

5. Hover your mouse above the control you want to edit.
   The *Edit* option appears.
6. Click the *Edit* button for the control.

The *Edit Control* window appears.

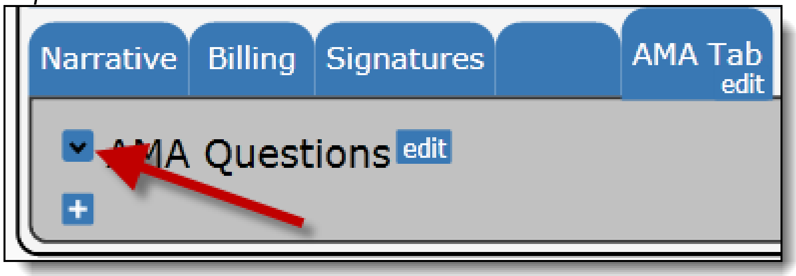
7. To hide this control if there is no appropriate data for the report being printed, select the *Hide Control On Empty Value* checkbox.
8. When finished, click *Save & Back.*
   The changes are saved.

Deleting a Control

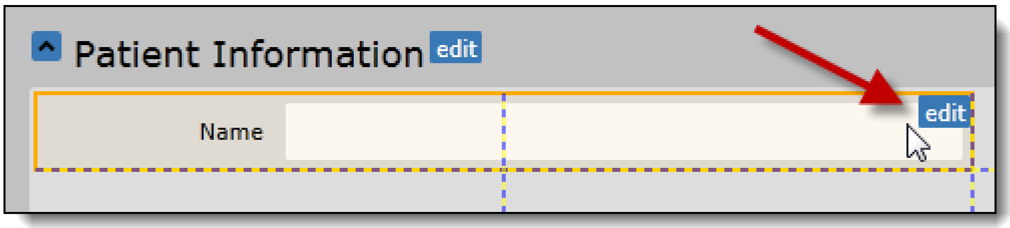
At times, you may need to delete a control in order to replace it with a different one. Be sure to pay attention to validation rules related to any fields you delete, as providers will not be able to complete a run form to 100% if you delete a required field.

1. Open the Layout Editor.
   The *Layout Editor* page appears.
   HINT: For more information, please refer to the *Opening the Layout Editor* section on page 105.
   NOTE: If you are updating a PDF report template, open the PDF Layout Editor.
2. For the template you want to edit, click the *View Tabs* button.
   A list of tabs for the template appears.
3. Click the name of the tab containing the panel.

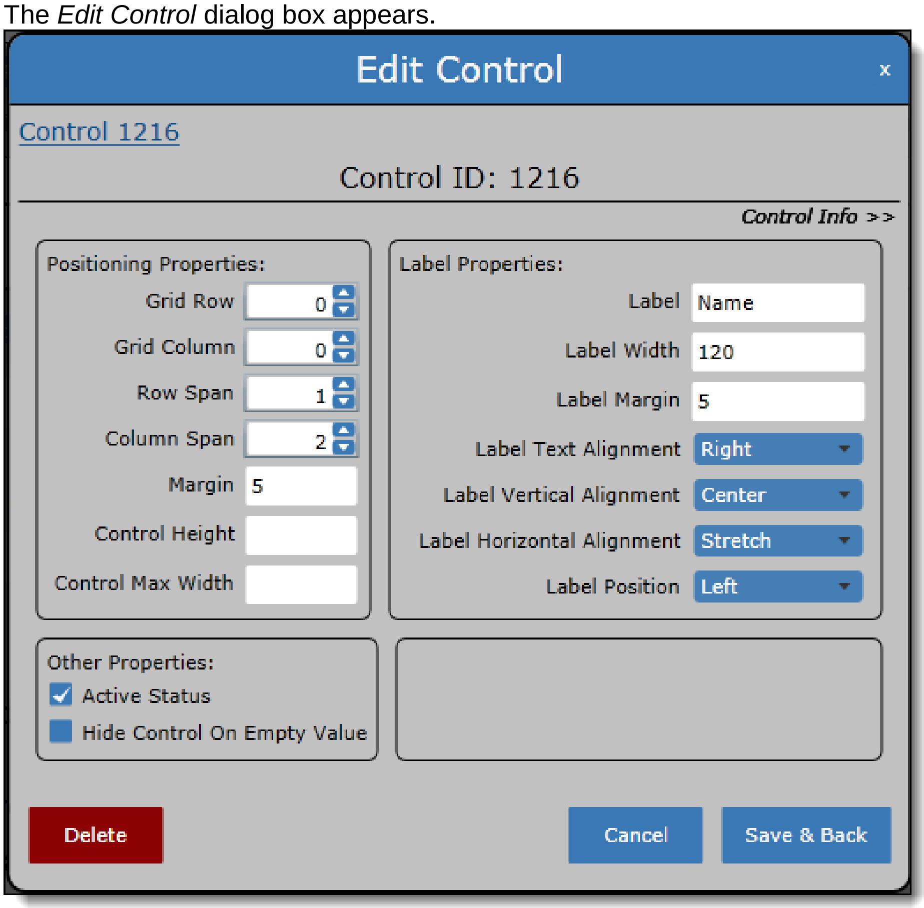
4. If necessary, to expand the panel containing the field you want to remove, click the *Expand* icon.



5. Place your mouse above the control you want to remove.
   The *Edit* button appears in the upper right corner of the field.
6. Click the *Edit* button for the control.



   The *Edit Control* dialog box appears.



7. From the lower left, click *Delete.*
   A confirmation dialog box appears.
8. Click *OK.*
   The control is removed.

5.19 Additional Run Form Template Setup Options

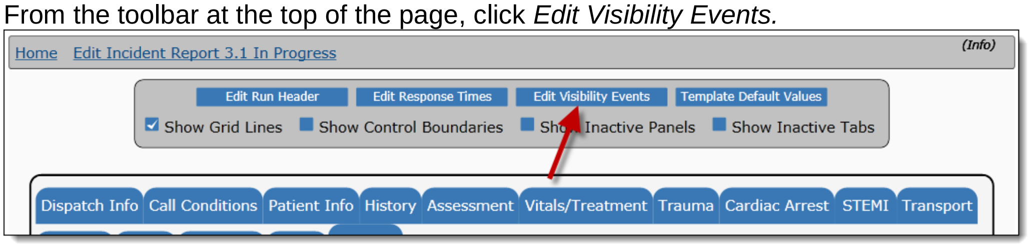
If you are working with the Layout Editor for run forms, you will have additional options for customizing your dynamic run forms.

Adding an Event Visibility Rule for a Template

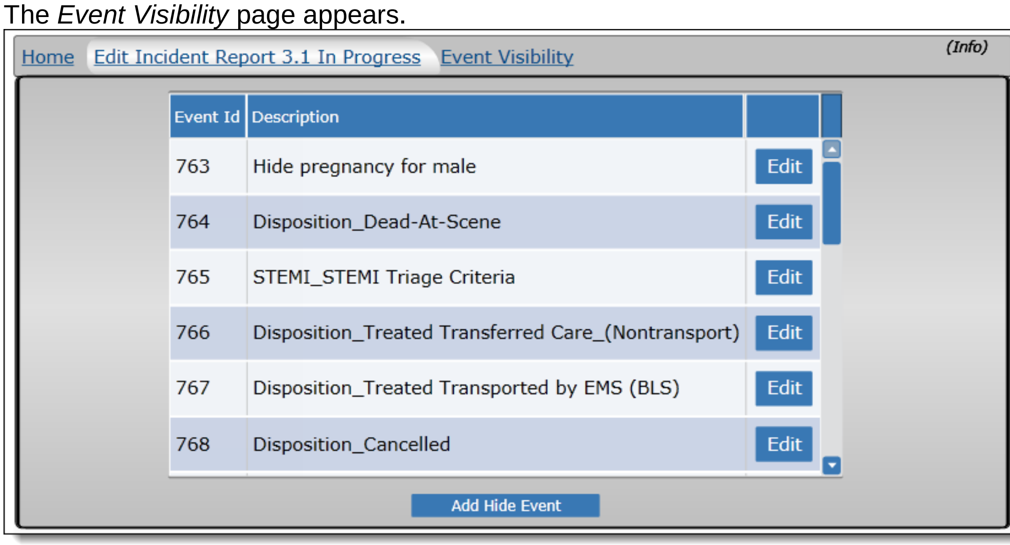
Event visibility rules allow you to show or hide specific parts of the run form template based on data entered into a run form. This reduces the number of unnecessary fields; for example, you could set a visibility event up to hide the *Pregnancy* field if the patient is male. Event visibility rules can be set up differently for each run form.

When setting up event visibility rules, you'll want to be aware of any validity rules based around fields that are being hidden. If you hide a required field, providers will not be able to finish a run form to 100% completion.

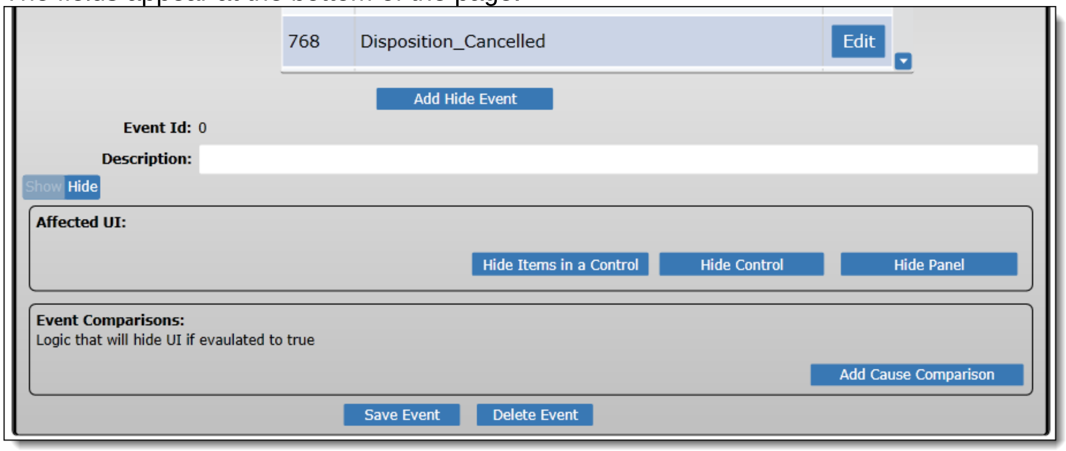
1. Open the Layout Editor.
   The *Layout Editor* page appears.
   HINT: For more information, please refer to the *Opening the Layout Editor* section on page 105.
2. For the template you want to edit, click the *View Tabs* button.
   A list of tabs for the run form appears.
3. From the toolbar at the top of the page, click *Edit Visibility Events.*



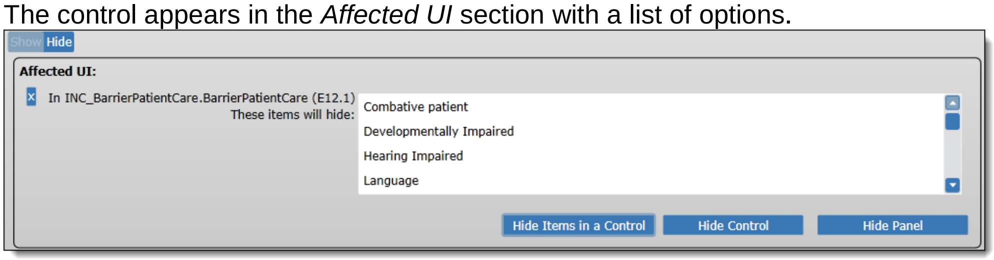
The *Event Visibility* page appears.



4. Click *Add Hide Event.*
   The fields appear at the bottom of the page.

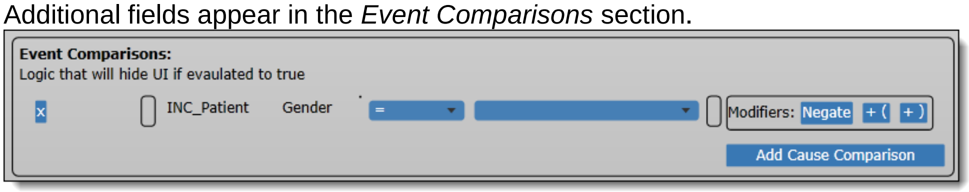


5. In the *Description* text box, type a descriptive name for this event.
   HINT: Providers will never see this name, but it can be a very helpful way to keep track of which visibility event is which in case you need to make changes later. Since the criteria set up with visibility events can become quite complex, it is easiest to create a descriptive name to help you organize your visibility events.
6. To select whether you are going to show fields when specific criteria are met, or hide them, click the *Show/Hide* icon.
   HINT: If the *Hide* option is highlighted, you will be selecting items to hide when criteria are met. If the *Show* option is highlighted, you will be selecting items that will only be displayed if the criteria are met. The text in the rest of the panel will not change based on whether you have selected to show or hide fields.
7. In the *Affected UI* section, click the appropriate button for the item you want to show or hide (e.g., a specific control, options available from a control or an entire panel).
8. For items in a control,
   a. From the *Find Control for Event* dialog box, search for the control containing the items you want to show or hide.
   b. Select the desired control.
   c. Click *View Selected Control.*
      A preview of the control appears.
   d. Click *Add Control.*
      The control appears in the *Affected UI* section with a list of options.



   e. Select all options to show or hide according to this visibility event.
      HINT: To select an item, click it once. To deselect the item, click it again.
9. For controls,
   a. From the *Find Control for Event* dialog box, search for the control to show or hide.
   b. Select the desired control.
   c. Click *View Selected Control.*
      A preview of the field appears.
   d. Click *Add Control.*
      The field is added to the *Affected UI* section.

10. For panels,
    a. From the *Select a Panel* dialog box, select the panel to be hidden or displayed.
    b. Click *OK.*
       The panel is added to the *Affected UI* section.
11. To add the criteria which will determine whether the items are displayed or hidden,
    a. In the *Event Comparisons* section, click *Add Cause Comparison.*
    b. In the *Select a control as a cause to the event* section, click *Select Control.*
       The *Find Control for Event* section appears.
    c. Use the search criteria to locate the field that will contain the values determining whether items are displayed or hidden.
       EXAMPLE: If you are creating a rule to hide the *Pregnancy* field when the patient is male, you will search for the *Gender* field in this step.
    d. Select the desired field.
    e. Click *View Selected Control.*
       A preview of the field appears.
    f. Click *Add Control.*
       Additional fields appear in the *Event Comparisons* section.



    g. From the first drop down menu after the control name, select the desired operator (e.g., equals)
    h. If necessary, to make the criteria negative (e.g., if the sections should be hidden only if a specific value is NOT selected), in the *Modifiers* section, click *Negate.*
    i. From the second drop down menu, select the desired value that should trigger the visibility event to hide or display the selected items.
    j. To add additional criteria, repeat steps a–i.
    k. **OPTIONAL:** To relate this criterion to a previous criterion, from the first drop down menu, select whether both criteria must be met (*And*) or only one of them (*Or*).
       NOTE: If both *And* and *Or* are used within one set of criteria, you will need to use the parentheses from the *Modifiers* section to group criteria together.
    l. When finished, click *Save Event.*
       The visibility event is saved.

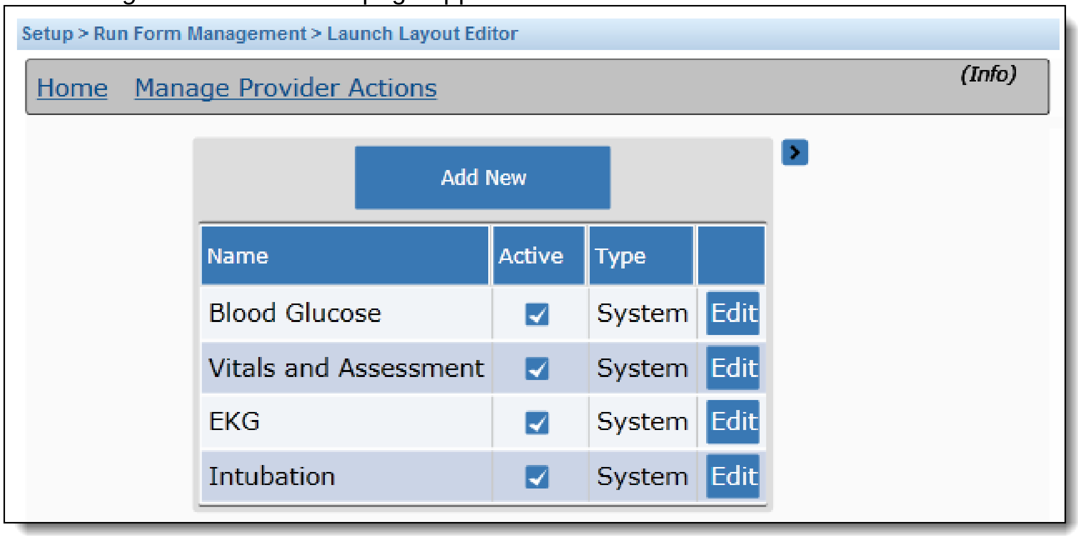
Setting Up Provider Actions

Provider actions allow you to group together procedure and vitals fields to quickly document important information for a specific action. You can create multiple provider actions, each of which will apply to all templates that collect provider actions. If your agency uses Field Bridge Xpress, keep in mind that all provider actions will be available for the dynamic run form, Field Bridge and Field Bridge Xpress.

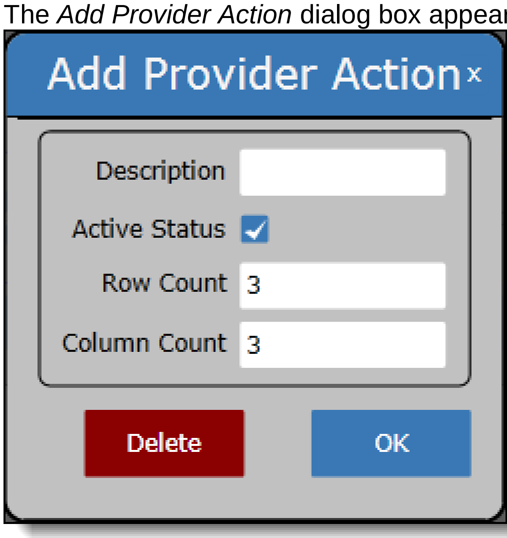
NOTE: In order to use provider actions, you will need to replace the *Activities* grid on your run forms with the *Provider Actions* grid (control ID 1242).

1. Open the Layout Editor.
   The *Layout Editor* page appears.
   HINT: For more information, please refer to the Opening the Layout Editor section on page 105.

2. From the *Template Actions* toolbar at the top of the page, click *Manage Provider Actions.* The *Manage Provider Actions* page appears.

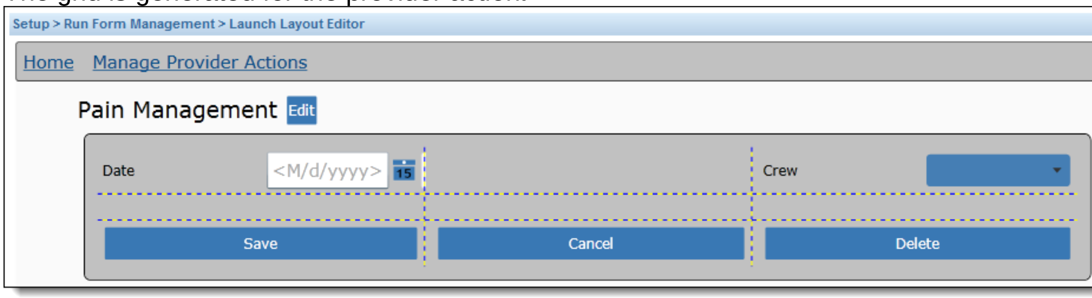


3. Click *Add New.* The *Add Provider Action* dialog box appears.



4. In the *Description* text box, type a name for this provider action.
   HINT: This will be the name that providers see when filling out a run form, so make sure that it is a descriptive name that will help them know when to document using this provider action.
5. To mark this provider action as available for use on run forms, select the *Active Status* checkbox.
   OR
   To mark this provider action as not available for use on run forms but available for reference by administrators, deselect the *Active Status* checkbox.
6. In the *Row Count* and *Column Count* text boxes, type the number of rows and columns that should be available to place fields in.

7. Click *OK.*
   The grid is generated for the provider action.



8. Add and remove fields to the provider action in the same way that you would add them to any panel in the dynamic run form.
   As you add and change the provider action it is automatically saved.
   HINTS:
   For more information about adding fields, please refer to the *Adding a Field* section.
   For information about removing any of the fields that are currently in the provider action, please refer to the *Deleting a Field* section.

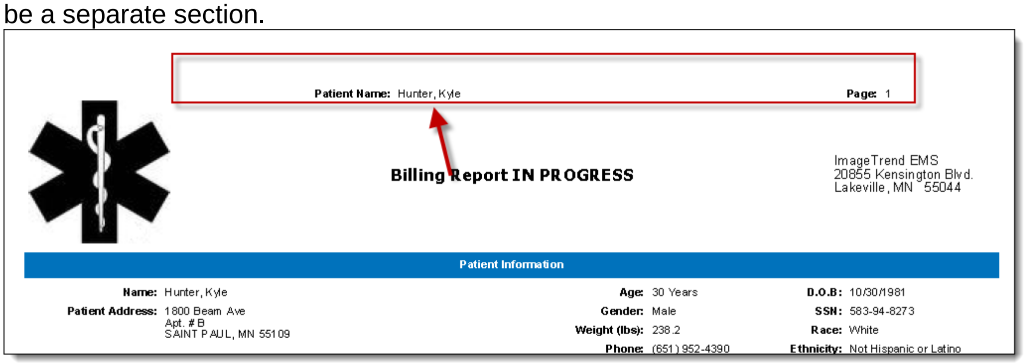
5.20 Additional PDF Report Template Setup Options

If you are working with the PDF Layout Editor, you will have additional options for customizing your PDF reports.

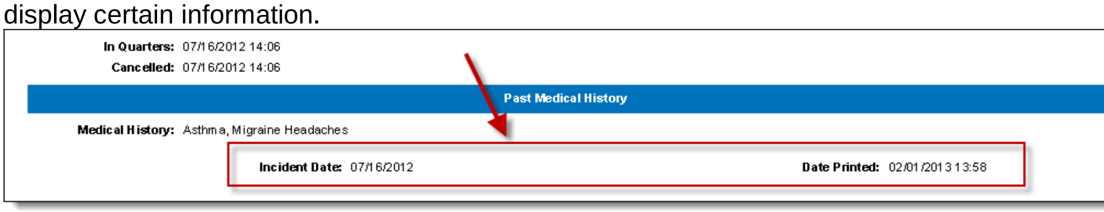
Editing the Header and Footer for your PDF Reports

You can customize the information included in your header and footer for each template through the PDF Layout Editor.

The header is a section at the top of the page that can be configured to display certain information. For the PDF Layout Editor, the section referred to as the header will not be the section of the report that displays your service information, logo and name of the report, but will be a separate section.



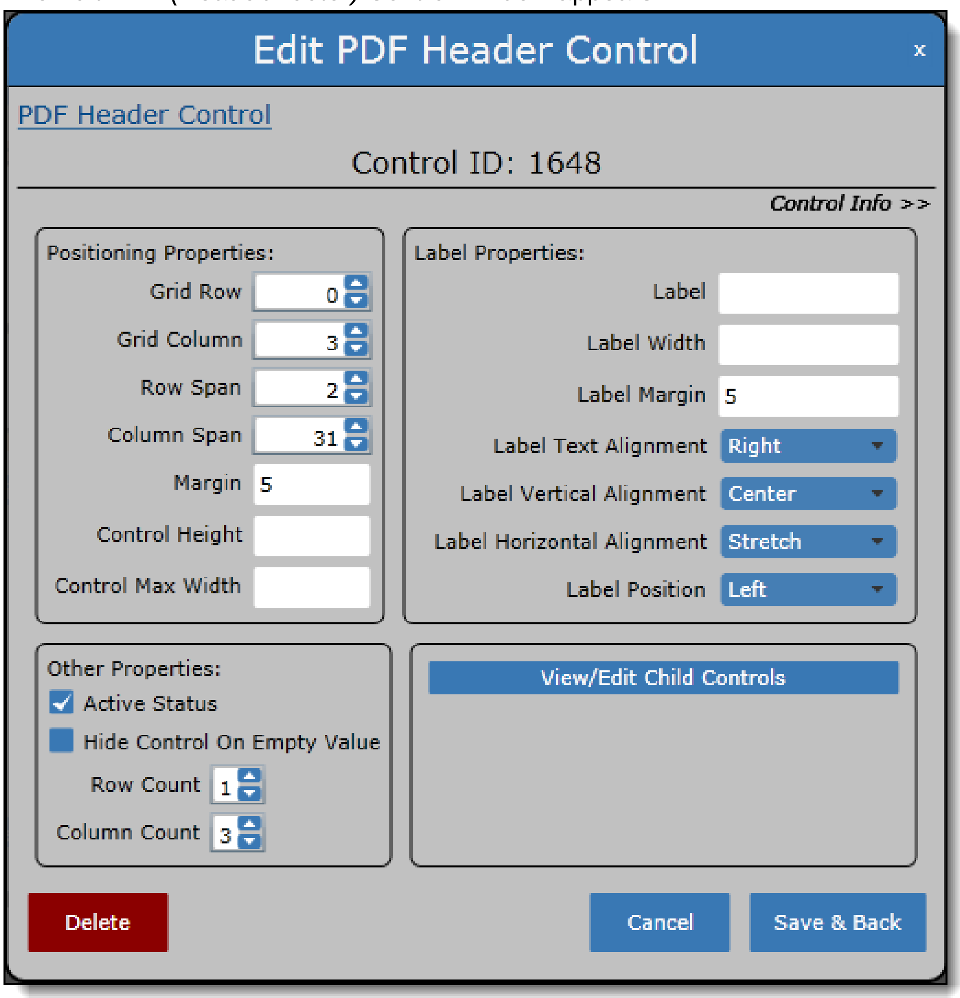
The footer is a section at the very bottom of each page of the report that can be configured to display certain information.



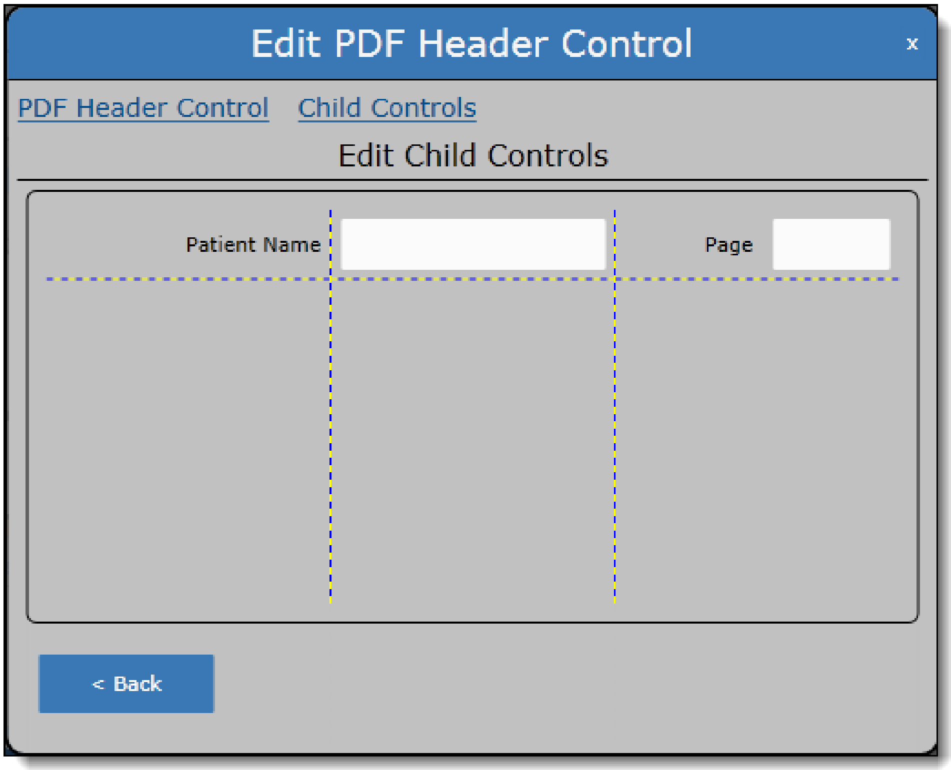
When you begin editing the header and footer, you will see all the same options that you would when editing any control on the run form. Many of these options will not generally be used, although they could be useful for specific situations. Most of the time when editing the header or footer, you will need to set up the grid for the data to be displayed and select the controls the be displayed.

The images in this section will show you the process of editing the header for your PDF template. You will use the same steps to edit the footer, but if you are editing the footer you may see different titles (referring to the footer rather than the header) on the windows that appear.

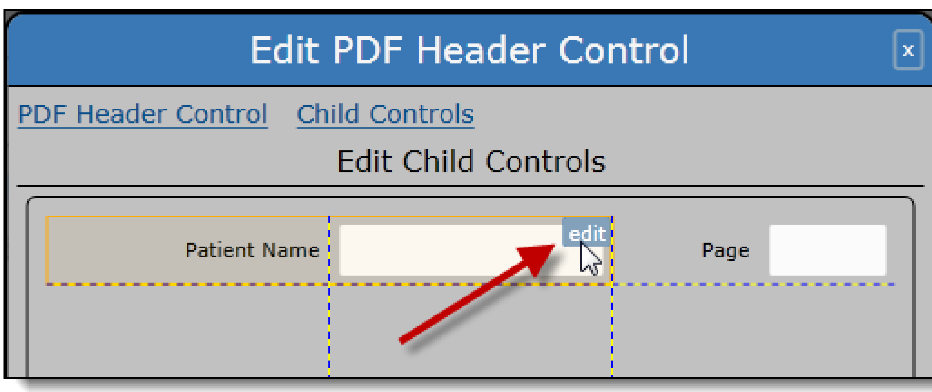
1. Open the PDF Layout Editor.
   HINT: For more information, please refer to the *Opening the Layout Editor* section on page 105.
2. For the report you want to edit the header for, click the *View Tabs* button.
   The *Edit (Report Name)* page appears.
3. From the toolbar at the top of the page, to edit the header, click *Edit PDF Header.*
   OR
   To edit the footer, click *Edit PDF Footer.*
4. The *Edit PDF (Header/Footer) Control* window appears.



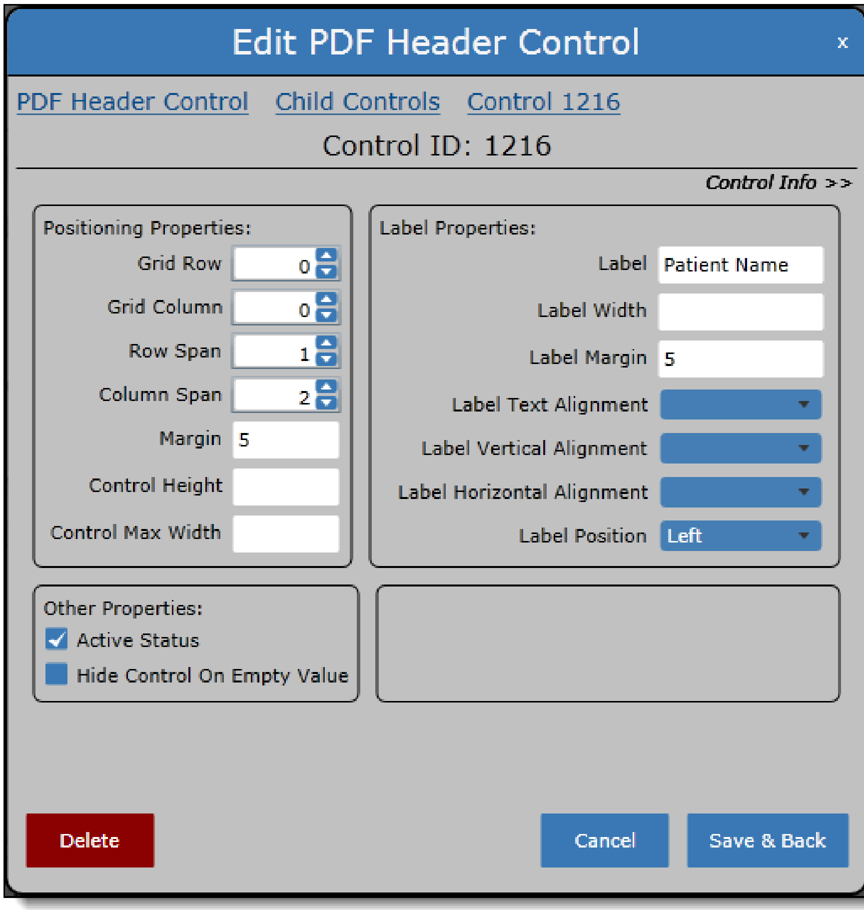
5. To change the number of rows or columns in the header or footer, in the *Row Count* and *Column Count* text boxes at the lower left, enter the desired number of rows and columns.
6. To update the controls contained in the header or footer, click *View/Edit Child Controls.* The *Edit Child Controls* page appears.



7. To edit an existing control in the header or footer,
   a. Hover your mouse above the control.
      The *Edit* option appears.
   b. Click the *Edit* button.



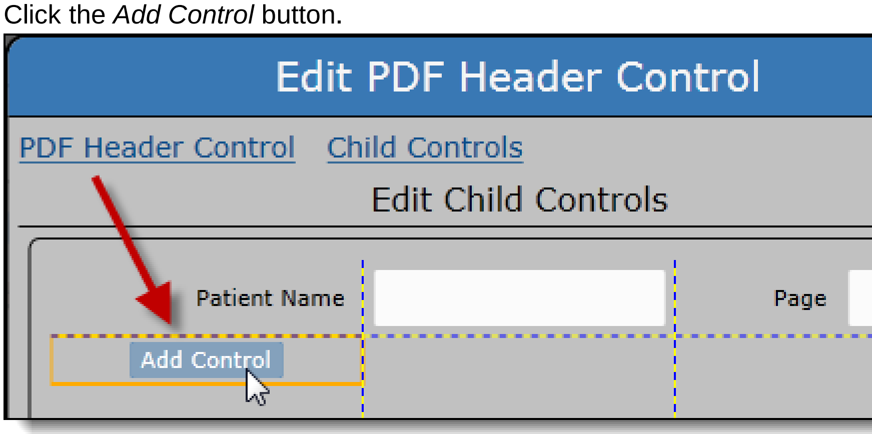
The *Edit PDF Header Control* page appears.



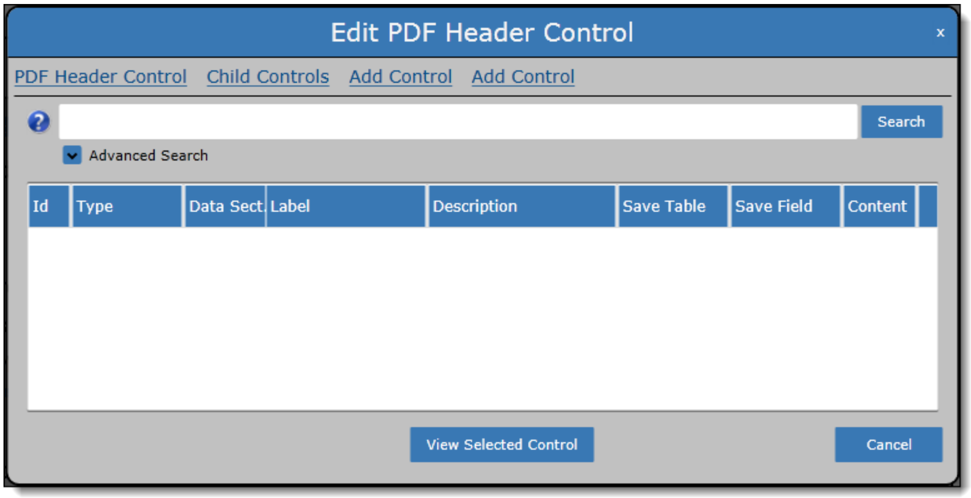
c. Update the control as needed.
HINT: You can update this control as you would any other control in the template. For more information, please refer to the *Updating Controls* section.

d. When finished with the control, click *Save & Back.*
You are returned to the list of child controls.

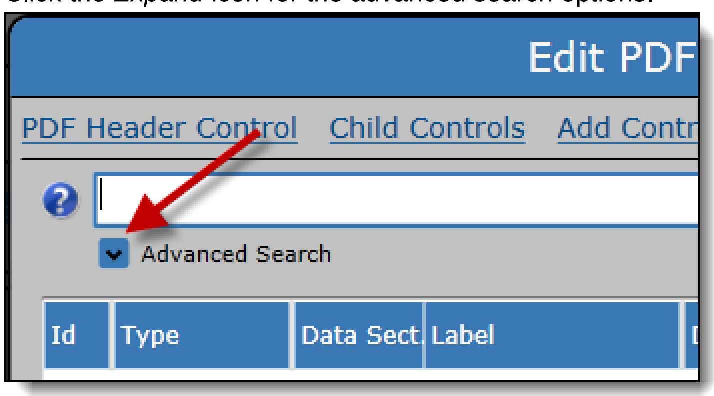
8. To add a new control to the header or footer,
    a. Hover your mouse above an empty space in the grid.
    The *Add Control* option appears.
    b. Click the *Add Control* button.



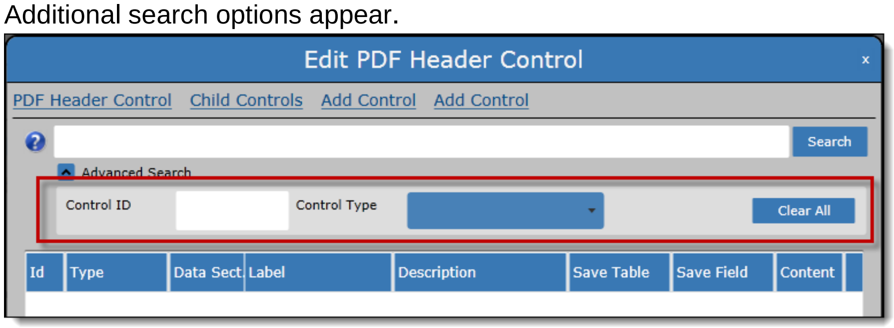
The *Add Control* page appears.



c. In the *Search* text box, type the name or part of the name of the control you want to add.
OR
To search by additional options,
   i. Click the *Expand* icon for the advanced search options.

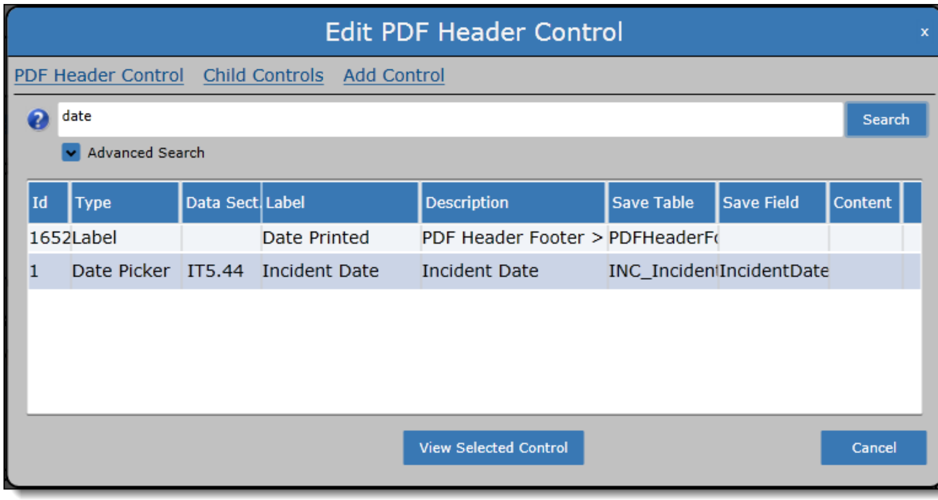


Additional search options appear.



   ii. As needed, type a control ID or select a control type to search for.

d. Click *Search.*
A list of controls matching your search terms appears.



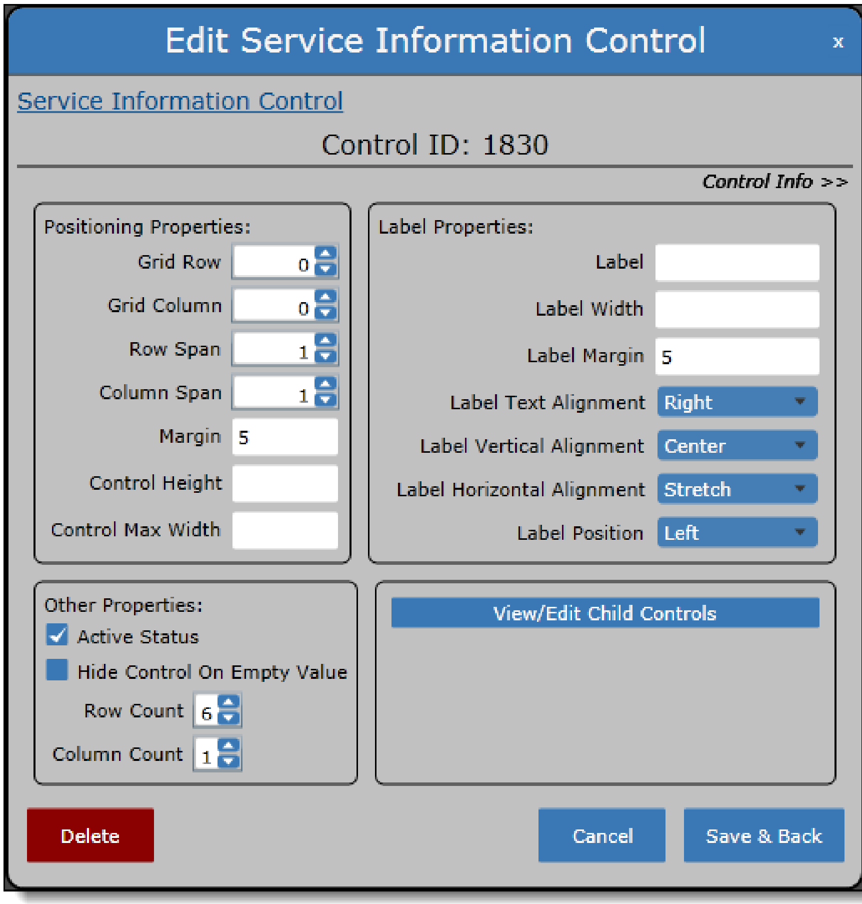
e. Select the control you want to add.
f. Click *View Selected Control.*
A preview of the control you selected appears.
g. To return to your search results, click *Back.*
OR
If this is the correct control, to add it to the selected space on the template, click *Add Control.*
The control is added.

Updating the Service Information for the Report

Each report contains information about your service at the top below the header. You can remove certain information that is displayed here by default if needed.

1. Open the PDF Layout Editor.
   HINT: For more information, please refer to the *Opening the Layout Editor* section on page 105.
2. For the report you want to edit the agency information for, click the *View Tabs* button.
   The *Edit (Report Name)* page appears.

3. From the toolbar at the top of the page, click *Edit Service Information.*
   The *Edit Service Information Control* modal window appears.



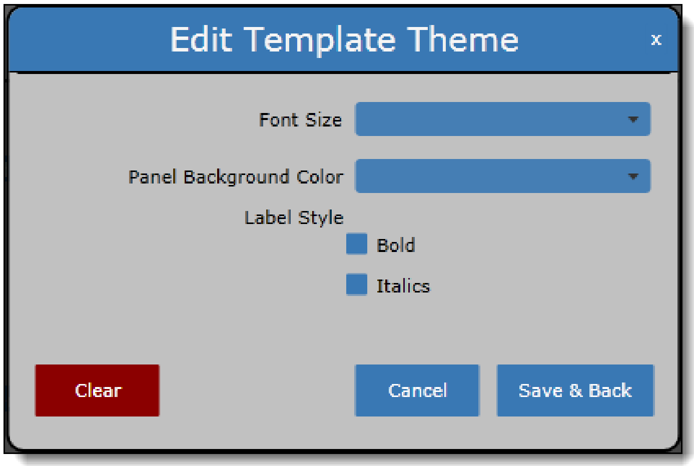
4. Click *View/Edit Child Controls.*
   A list of the service information controls appears.
5. For the control you want to remove, click *Edit.*
   The details for the control appear.
   NOTE: The *Edit* button will not appear until you hover your mouse over that control.
6. Click *Delete.*
   A confirmation dialog box appears.
7. Click *OK.*
   The control is removed and the information will no longer be included in the report.

Updating the Display Options for the Template

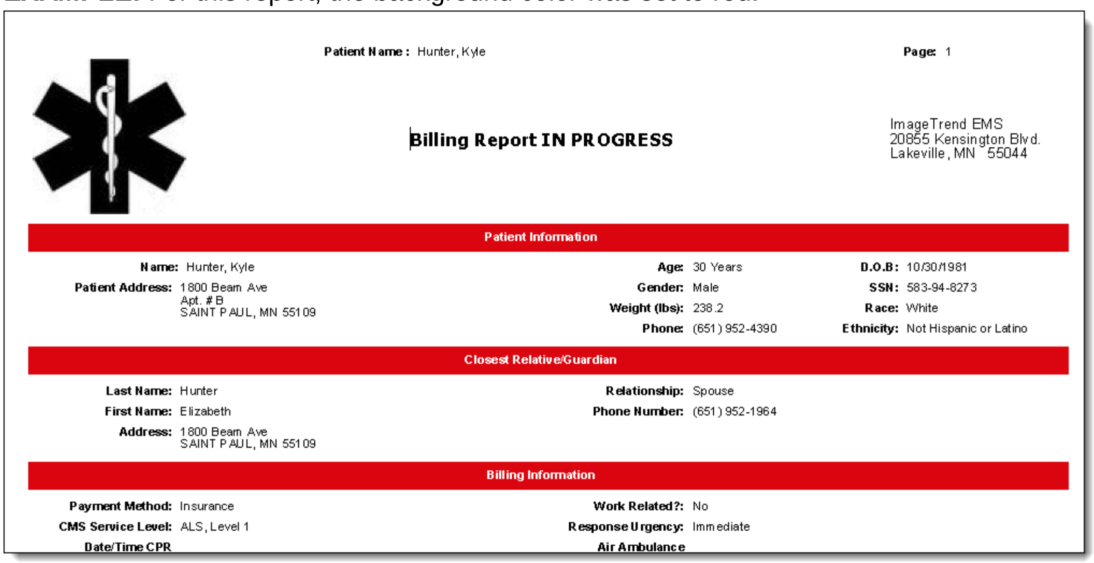
You can update specific display options for any PDF report template, including the font size, background color for panels and text style for the labels on controls.

1. Open the PDF Layout Editor.
   HINT: For more information, please refer to the *Opening the Layout Editor* section on page 105.
2. For the report you want to update, click the *View Tabs* button.
   The *Edit (Report Name)* page appears.

3. From the toolbar at the top of the page, click *Edit Theme.*
   The *Edit Template Theme* window appears.



4. From the *Font Size* drop down menu, select the size that you want the text to appear on the report.
5. From the *Panel Background Color* drop down menu, select the color that you want to appear as the background color for each panel header on the report.
   EXAMPLE: For this report, the background color was set to red.

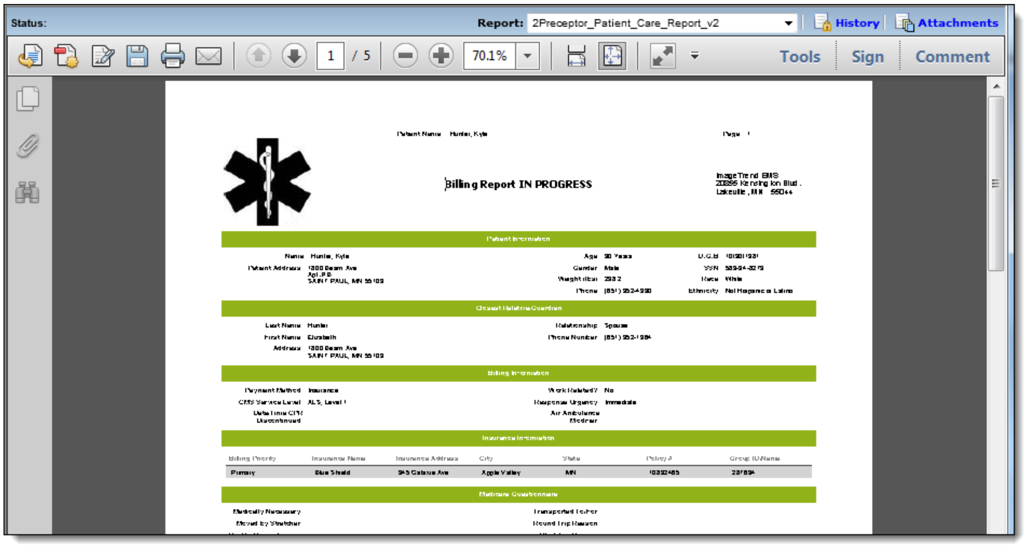


6. From the *Label Style* section, select whether you want the labels for each field to appear as bold or italics.
7. When finished, click *Save & Back.*
   The changes are applied.

Previewing an Example Report

When you are working with your report template, you can preview the report to see what it will look like. When previewing a report, sample data will be filled in automatically. This allows you to view most aspects of the report, but will not allow you to see what the report will look like when there is no data for a panel or field that is set to be hidden; previewing the report will always enter data for all fields in the template.

1. Open the PDF Layout Editor.
   HINT: For more information, please refer to the *Opening the Layout Editor* section on page 105.
2. For the report you want to preview, click the *View Tabs* button.
   The *Edit (Report Name)* page appears.
3. From the toolbar at the top of the page, click *Preview Layout.*
   A preview of the report in PDF format appears in a new tab or window in your browser.
   NOTE: This may take a few seconds as demonstration data is entered into the report. Please be patient.



CHAPTER 6

GENERAL APPLICATION SETUP

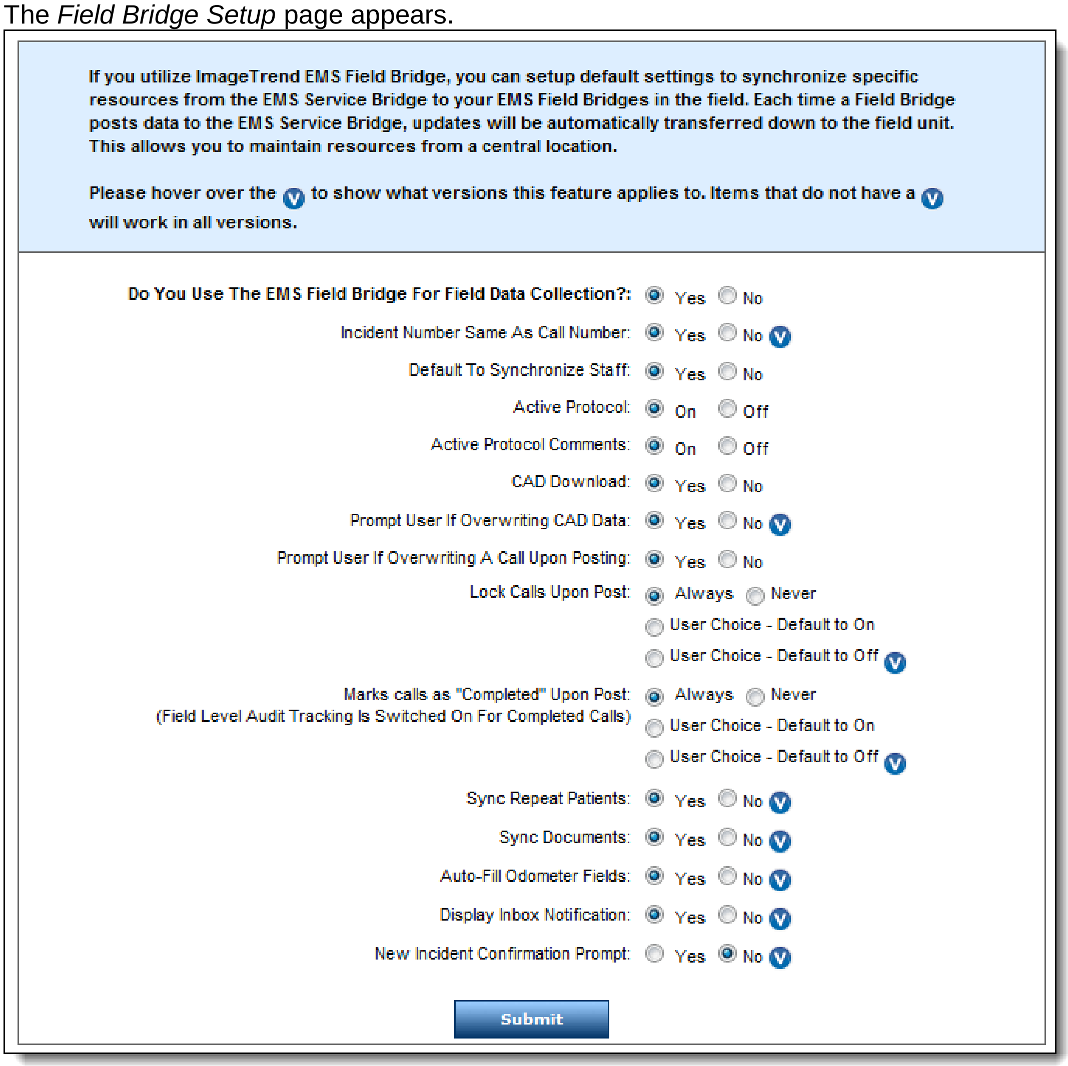
6.1 Chapter Overview

Administrators can configure the Field Bridge application to interact with EKG devices, track data about how the Field Bridge is used, upload or change reports and narratives, upload logos for printed reports, add documents for reference to the Field Bridge or change some automatic actions for run forms.

6.2 Setting Up Field Bridge Integration Options

Within your Web-based system, you can set information to flow between the Web-based system and your Field Bridge. This allows any changes that are made to run forms or staff lists to be sent to the run forms in the Field Bridge and any data collected with the Field Bridge to be automatically uploaded to the Web-based system database for central access. Administrators can set these options for information sharing.

1. In the Web-based system, from the top left, click *My Service* or *My Fire Department.*
2. Select the *Setup* tab*.*
3. Under the *Field Bridge* section, select *Preferences.*
   A sub-menu appears.
4. Under *Preferences,* click *General.*
   The *Field Bridge Setup* page appears.



5. To ensure that your service is using the Field Bridge with this Web-based system, in the *Do you use the EMS Field Bridge for field data collection?* section, select *Yes.*

6. To set the incident number to automatically be the same as the call number for run forms in the Field Bridge, in the *Incident Number Same as Call Number* section, select *Yes.*

   HINT: In order for this option to work, your Field Bridge must be updated to at least version 4.2.
7. To set new users to synchronize to the Field Bridge by default, in the *Default to Synchronize Staff* section, select *Yes.*
8. To enable active protocols and synchronize all active protocols set up on the Service Bridge to your Field Bridge systems, in the *Active Protocol* section, select *On.*
9. To enable CAD integrations, in the *CAD Download* section, select *Yes.*

   NOTE: This option is only available if the CAD module has been integrated.
10. If you have the CAD module and want to warn users if they are entering data that will overwrite CAD data, in the *Prompt User if overwriting CAD data* section, select *Yes.*
11. To display a warning message to any user who is posting and will be overwriting an existing call in the system, in the *Prompt User if overwriting a call when posting* section, select *Yes.*

    NOTE: Run forms can be overwritten if they have the same incident number, call number and PCR number.
12. To set run locking options for calls that are posted, in the *Lock Calls Upon Post* section, select the desired option.

    HINT: In order for this option to work, your Field Bridge must be updated to at least version 5.3.
13. To set options for marking calls as completed when they are posted from the Field Bridge, in the *Marks calls as "Completed" Upon Post* section, select the desired setting.
14. To copy repeat patient data to the Field Bridge during syncing, in the *Sync Repeat Patients to the EMS Field Bridge* section, select *Yes.*

    HINT: In order for this option to work, your Field Bridge must be updated to at least version 4.
15. To set Field Bridge systems to search the repeat patient database online, in the *Online Repeat Patient Search* section, select *Yes.*

    HINTs:
    This option will not appear unless you have the *Sync Repeat Patients* section set to *No.*
    If you set this option to *Yes,* Field Bridge systems will not be able to use repeat patients if they do not have access to the Internet. However, the repeat patient database will not need to be stored on each computer with the Field Bridge.
16. To copy documents available on the Service Bridge to the Field Bridge, in the *Allow documents to be synced down to each Field Bridge* section, select *Yes.*

    HINT: In order for this option to work, your Field Bridge must be updated to at least version 4.
17. To automatically fill in odometer fields with the value that was entered into the previous odometer field, in the *Auto Populate Odometer Fields* section, select *Yes.*

    HINT: In order for this option to work, your Field Bridge must be updated to at least version 4.5.2.
18. To display a notification and link to the Service Bridge inbox when the logged in user has an unread inbox message, in the *Display Inbox Notification* section, select *Yes.*
19. To require providers to confirm the information included in the Field Bridge Dashboard each time a new run is begun, in the *display Inbox Notification* section, select *Yes.*

    HINT: If this option is set to *Yes,* a prompt will appear each time a new run form is started confirming that the shift information on the Dashboard is still accurate before it will enter that information into the new run form.
20. When finished, click *Submit.*
    The information to be copied to the Field Bridge on syncing is set.

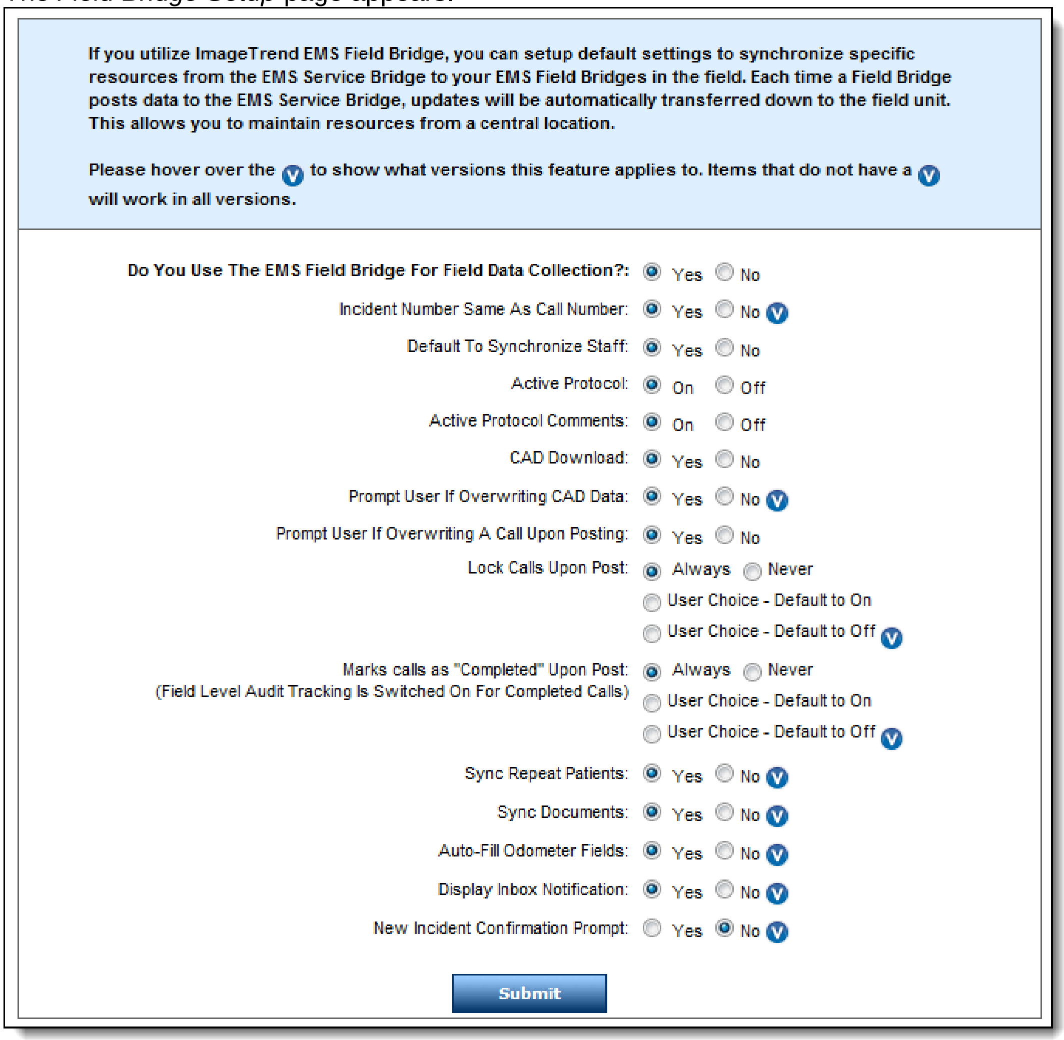
6.3 Working with Automatic Actions for Run Reports

You can use the Web-based system to set up certain automatic actions that can be taken for run forms, including deleting run records from the Field Bridge records after a certain number of days or automatically locking calls once they have been posted.

Locking Calls on Posting

You can use the Web-based system to set the Field Bridge to automatically lock calls after posting, preventing further changes. You also have the option to allow the user posting the call to select whether the call should be locked.

1. In the Web-based system, from the top left, click *My Service* or *My Fire Department.*
2. Select the *Setup* tab.
3. Under the *Field Bridge* section, select *Preferences.*
   A sub-menu appears.
4. Under *Preferences,* click *General.*
   The *Field Bridge Setup* page appears.

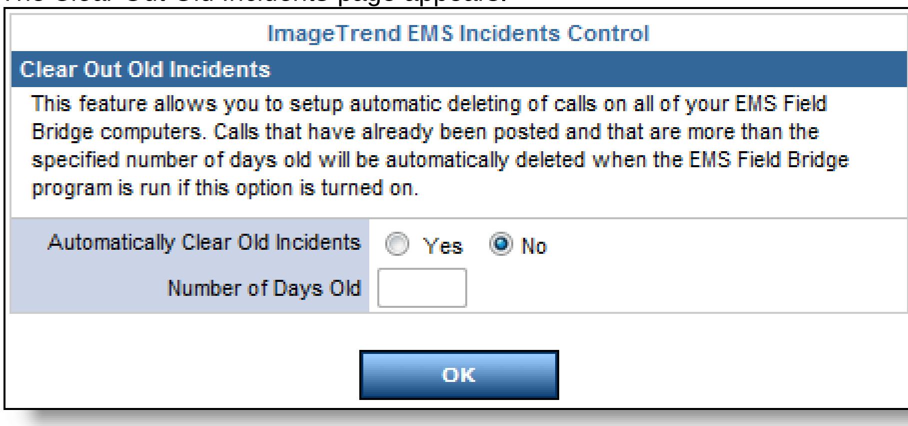


5. To automatically lock all calls after posting, in the *Lock calls upon post* section, select *Yes.*
   OR
   To allow the user to decide whether calls should be locked when they are posted, select *User Choice – Default to On* or *User Choice – Default to Off,* as appropriate.
6. Click *Submit.*
   The changes are applied.

Automatically Deleting Old Incidents

You can use your Web-based system to set the Field Bridge to automatically delete run reports from the system after they have been posted and after a particular amount of time. Runs will still be saved on the Web-based system.

1. In the Web-based system, from the top left, click *My Service* or *My Fire Department.*
2. Select the *Setup* tab.
3. Under the *Field Bridge* section, select *Preferences.*
   A sub-menu appears.
4. Under *Preferences,* click *Clear Out Old Incidents.*
   The *Clear Out Old Incidents* page appears.



5. To automatically delete old incidents, in the *Automatically Clear Old Incidents* section, select *Yes.*
6. To select the number of days an incident report should be saved before deleting it from the system, in the *Number of Days Old* section, type the desired number of days.
7. Click *OK.*
   The changes are saved.

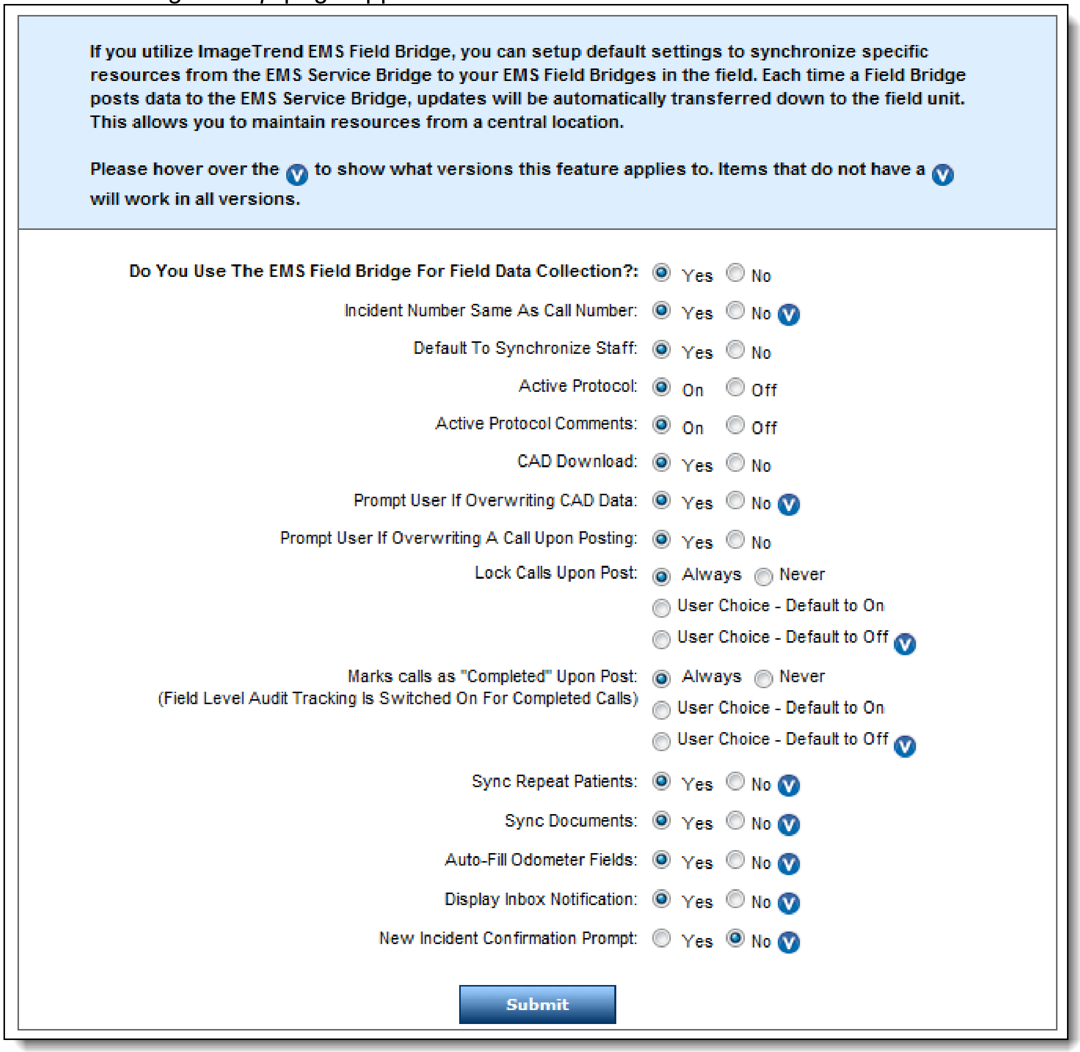
6.4 Showing Inbox Message Notifications

You can choose to display notifications on the Field Bridge for users who have messages in their Service Bridge/State Bridge/Rescue Bridge inbox. If you choose to display this notification, whenever a user has a message in his or her Inbox, a number notification will appear on the Field Bridge informing the user of how many messages he or she has. Clicking this number will open the Service Bridge/State Bridge/Rescue Bridge for the user to log in and view his or her messages.

Notifications for new messages will not be displayed until the Field Bridge syncs to the Service Bridge/State Bridge/Rescue Bridge.

1. In the Web-based system, from the top left, click *My Service* or *My Fire Department.*
2. Select the *Setup* tab.
3. Under the *Field Bridge* section, select *Preferences.*
   A sub-menu appears.

4. Under *Preferences,* click *General.*
   The *Field Bridge Setup* page appears.



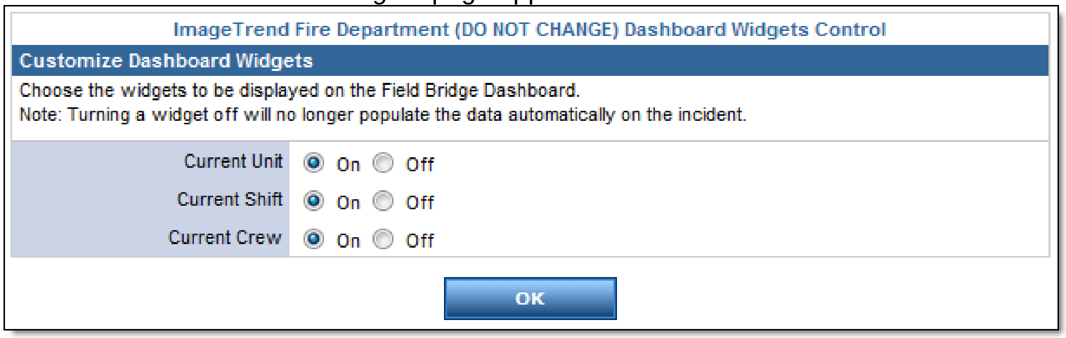
5. In the *Display Inbox Notification* section, click *Yes.*
   Inbox notifications will now be displayed for users after each Field Bridge syncs to receive the new settings.

6.5 Showing or Hiding Dashboard Widgets

The Field Bridge Dashboard has several widgets that can control information being input into run forms, such as the *Current Crew* or *Current Shift* widgets. Administrators can choose whether these widgets should be displayed on the Dashboard for the Field Bridge or hidden. Widgets will be displayed by default until an administrator changes these settings.

1. In the Web-based system, from the top left, click *My Service* or *My Fire Department.*
2. Select the *Setup* tab.
3. Under the *Field Bridge* section, select *Preferences.*
   A sub-menu appears.

4. Under *Preferences,* click *Dashboard Widgets.*
   The *Customize Dashboard Widgets* page appears.



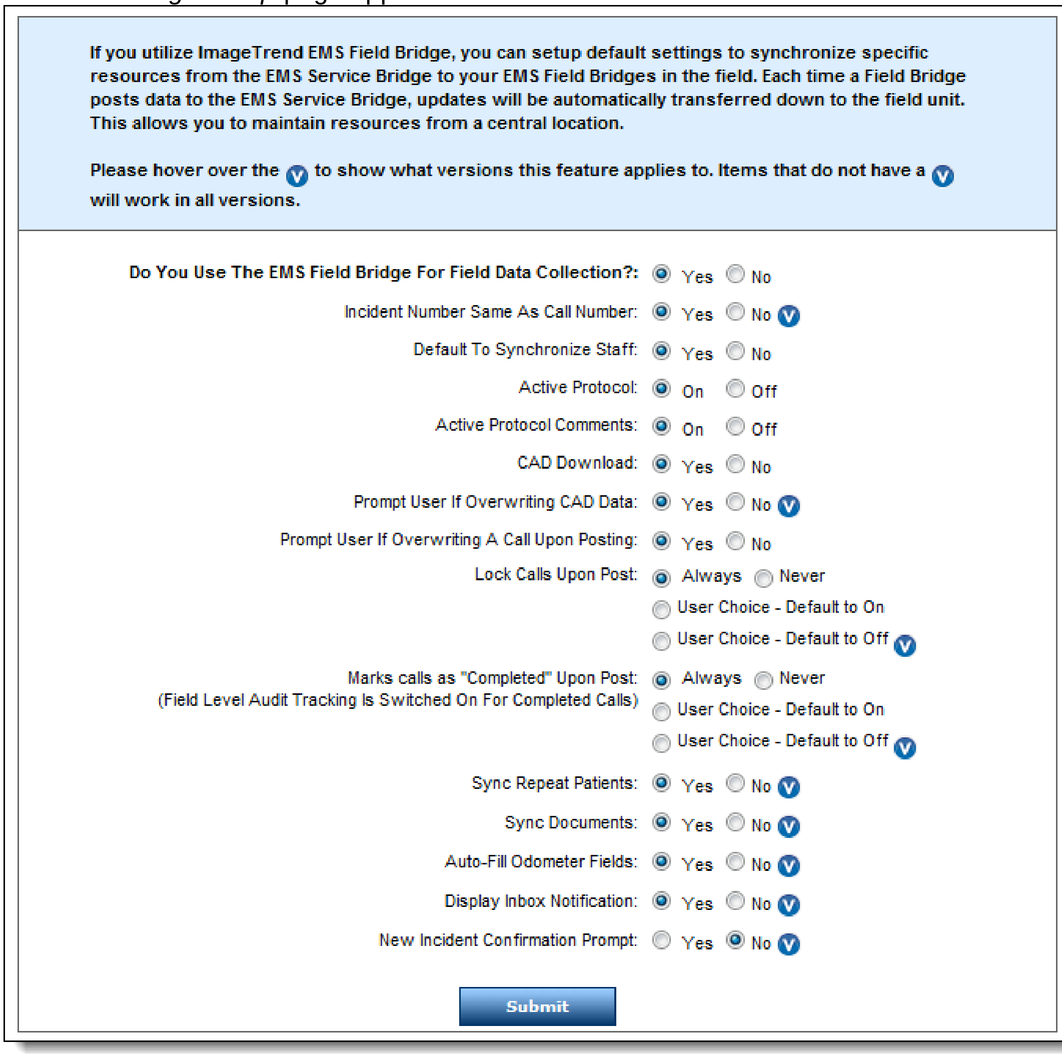
5. For any widget to hide from the Dashboard, select *Off.*
6. For any widget to display on the Dashboard, select *On.*
7. When finished, click *OK.*

Requiring Confirmation of Dashboard Information

If you choose to enable the Dashboard widgets for your agency, you can enable a prompt that will appear every time a new run form is started, asking the users to confirm the shift information that is entered in the Dashboard widgets. If the shift information is incorrect, the user will be prompted to enter the updated information.

1. In the Web-based system, from the top left, click *My Service* or *My Fire Department.*
2. Select the *Setup* tab*.*
3. Under the *Field Bridge* section, select *Preferences.*
   A sub-menu appears.

4. Under *Preferences,* click *General.*
   The *Field Bridge Setup* page appears.



5. From the *New Incident Confirmation Prompt* section, select *Yes.*
6. Click *Submit.*
   The setting is applied.

6.6 Setting Up an EKG

The Field Bridge can work with several types of EKG monitors, including Philips, LIFEPAK and Zoll. Before you are able to import EKG data, you must set up the EKG monitor type that you will be using on the system. Certain types of EKG monitors require additional software from the EKG to be installed on the computer before you can configure them.

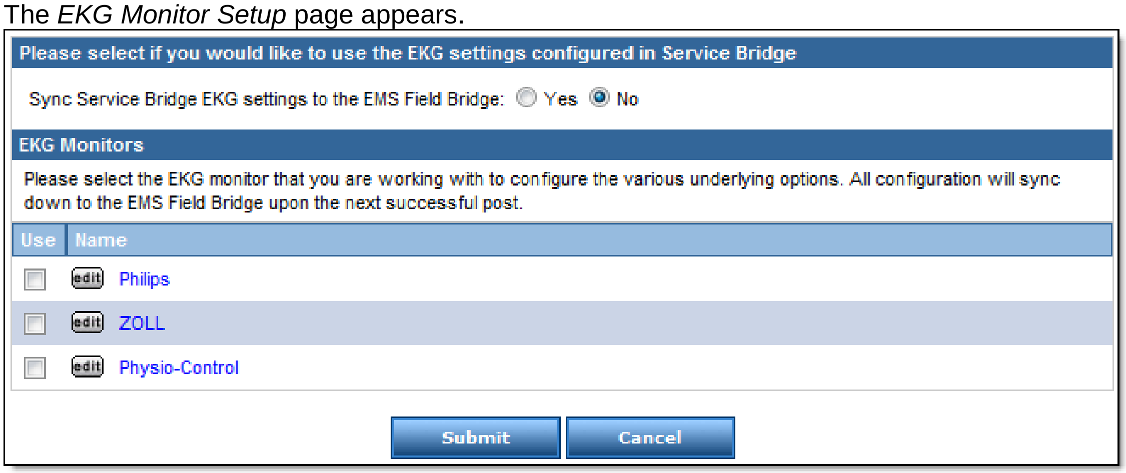
For each type of EKG monitor, you can configure certain settings either on the Field Bridge or in the Web-based system. For additional information about setting up each type of monitor, please refer to the appropriate setup guide.

Controlling EKG Monitor Setup on the Web-based System

If your service uses EKG monitors with the Field Bridge, you can control some setup options on the Web-based system. These options will then be set up in the same way for all Field Bridge systems.

All settings specific to connecting to the monitor will still need to be set up per computer on the Field Bridge.

1. In the Web-based system, from the top left, click *My Service* or *My Fire Department.*
2. Select the *Setup* tab.
3. Under the *Field Bridge* section, select *EKG.*
   A sub-menu appears.
4. Under *EKG,* click *Setup.*
   The *EKG Monitor Setup* page appears.



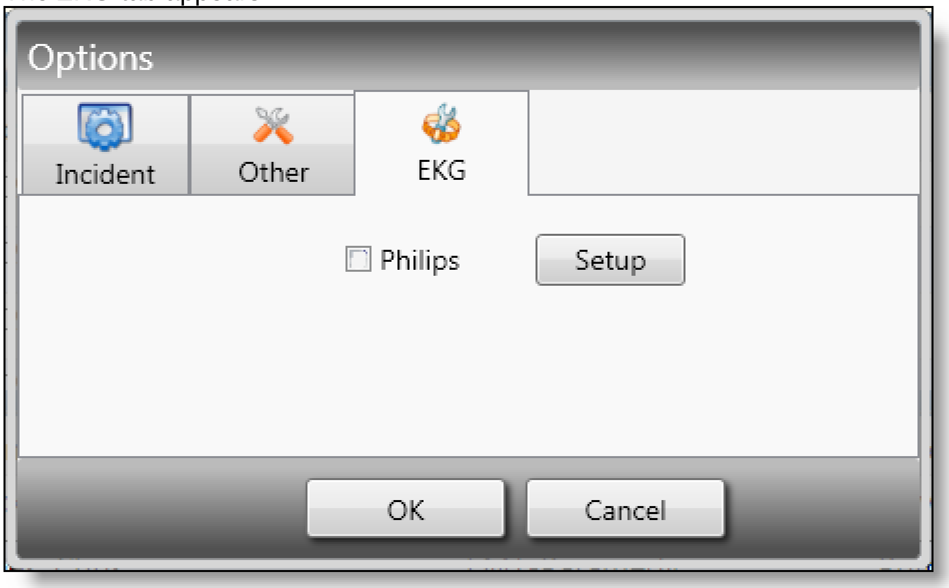
5. Click the name of the type of monitor you want to set up.
6. Configure the settings you want to be applied to all Field Bridge systems.
   NOTE: For more information about these settings, please refer to the setup guide for that type of EKG monitor and the Field Bridge.
7. When finished, click *Submit.*
   The settings are saved.
8. To return to the list of EKG monitors, click *Cancel.*
9. Select the checkbox for the type of monitor you just set up.
10. Click *Submit.*

Setting Up a Philips EKG Monitor in the Field Bridge

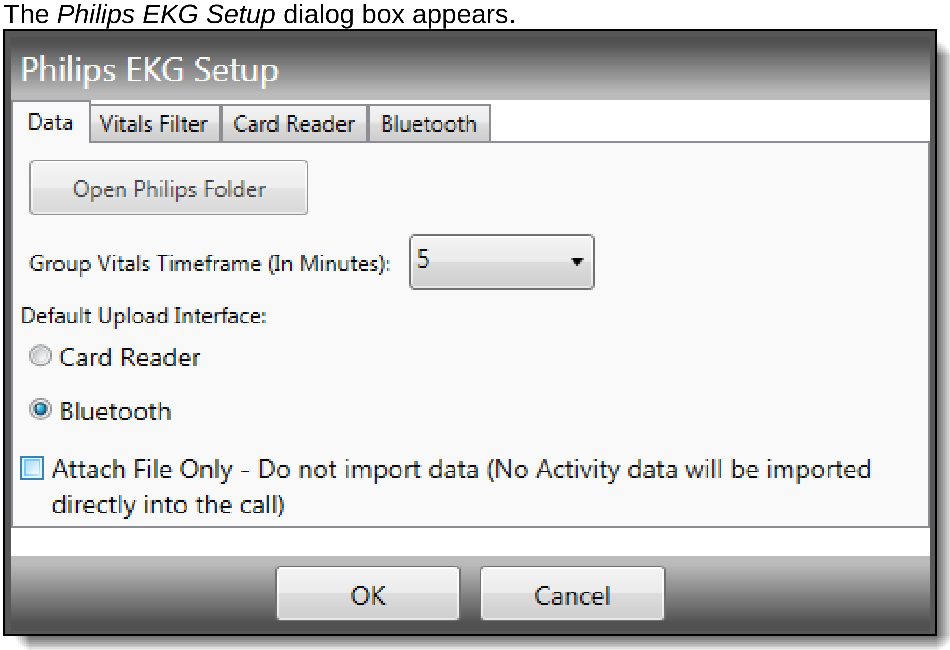
Administrators can configure a Philips EKG monitor on the Field Bridge system.

1. In the Field Bridge, from the left menu of the dashboard, click *Administrative Options.*
   The *Options* page appears.

2. Select the *EKG* tab.
   The *EKG* tab appears.

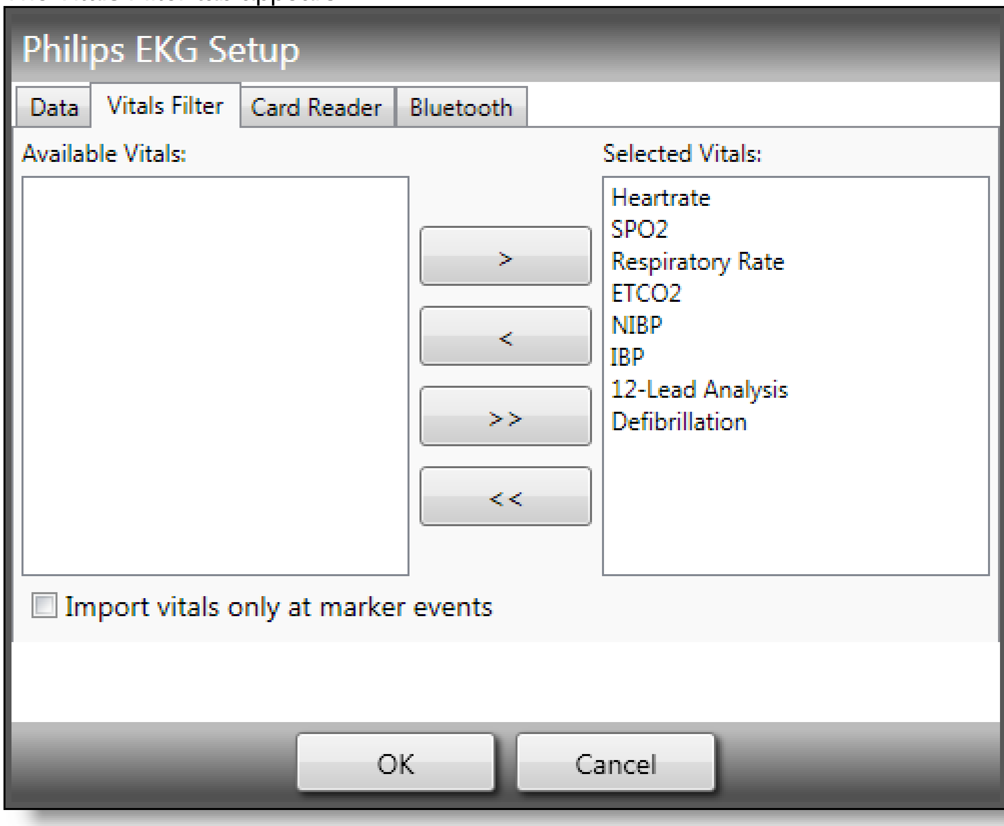


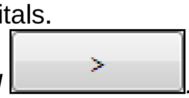
3. For the *Philips* options, select *Setup.*
   The *Philips EKG Setup* dialog box appears.



4. **OPTIONAL**: To view the folder in which your files will be stored, click *Open Folder.*
5. In the *Default Upload Interface* section, select the way that files will most often be uploaded.

6. Select the *Vitals Filter* tab.
   The *Vitals Filter* tab appears.

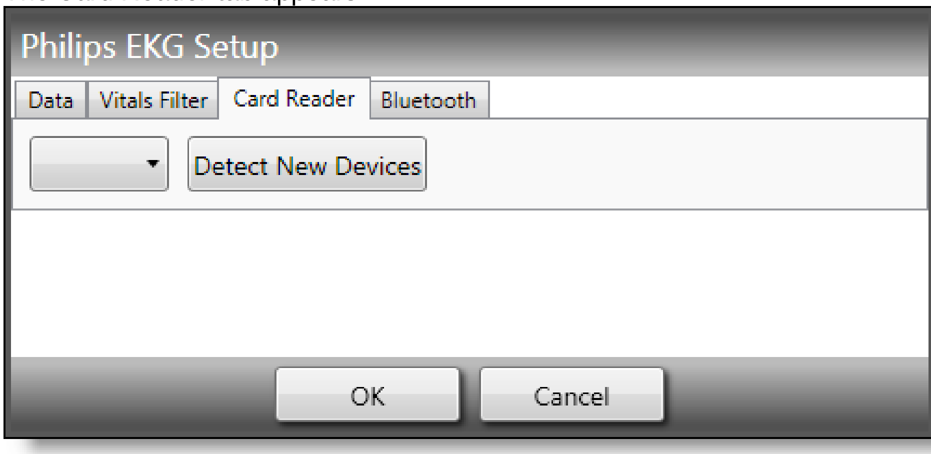


7. To select vitals that should be imported, from the *Available Vitals* section, select the desired vitals.
8. Click *Add* 

.
9. To select vitals that should not be imported, from the *Selected Vitals* section, select the undesired vitals.
10. Click *Remove* 

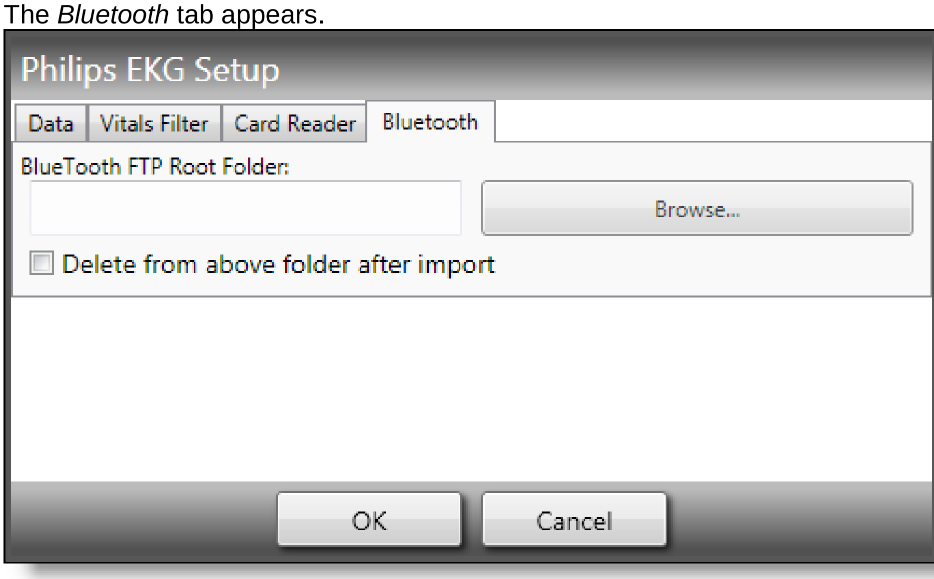
.
11. To choose to import vitals only at marker events, select the *Import vitals only at marker events* checkbox.
12. If you will be using a card reader for data import,

a. Select the *Card Reader* tab.
The *Card Reader* tab appears.



b. Make sure the card reader is currently plugged in to the computer.
c. Click *Detect New Devices.*
OR
From the drop down menu, select the drive to which the card reader is assigned.

13. If you will be using Bluetooth for data import,
    a. Select the *Bluetooth* tab.
    The *Bluetooth* tab appears.

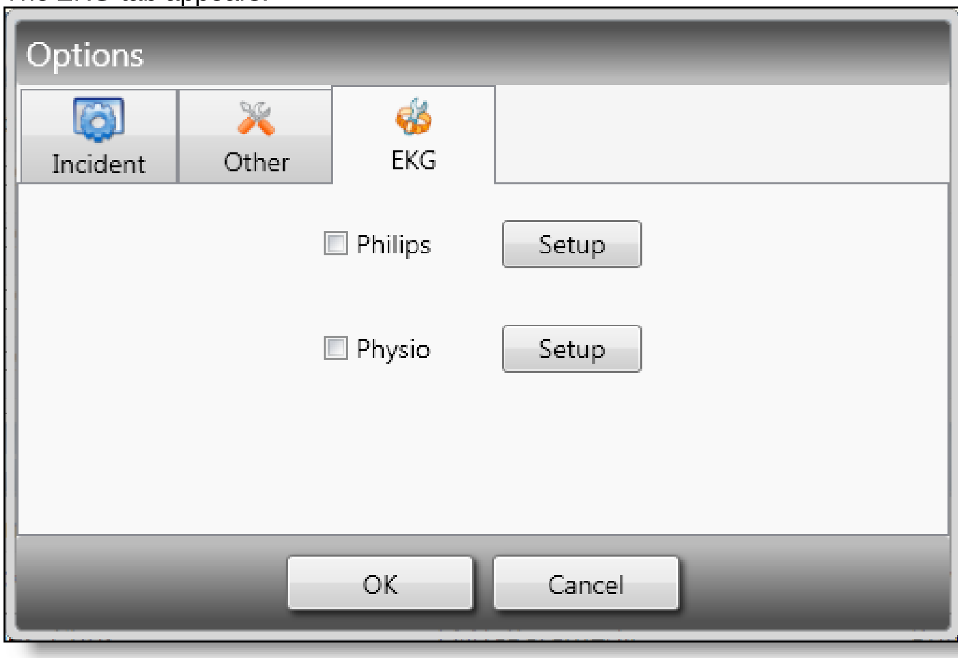


    b. To locate the folder into which files will be imported,
        i. Click *Browse…*
        The *Choose File* dialog box appears.
        ii. Navigate to and select the desired folder (e.g., *My Documents* > *Bluetooth*).
        iii. Click *Open.*
        The *Choose File* dialog box closes.
    c. To remove the Bluetooth files from the selected folder after they are imported to the Field Bridge, select the *Delete from above folder after import* checkbox.
14. When finished, with setup, click *OK.*
15. To begin using this EKG device, select the *Philips* checkbox.
16. When finished, click *OK.*

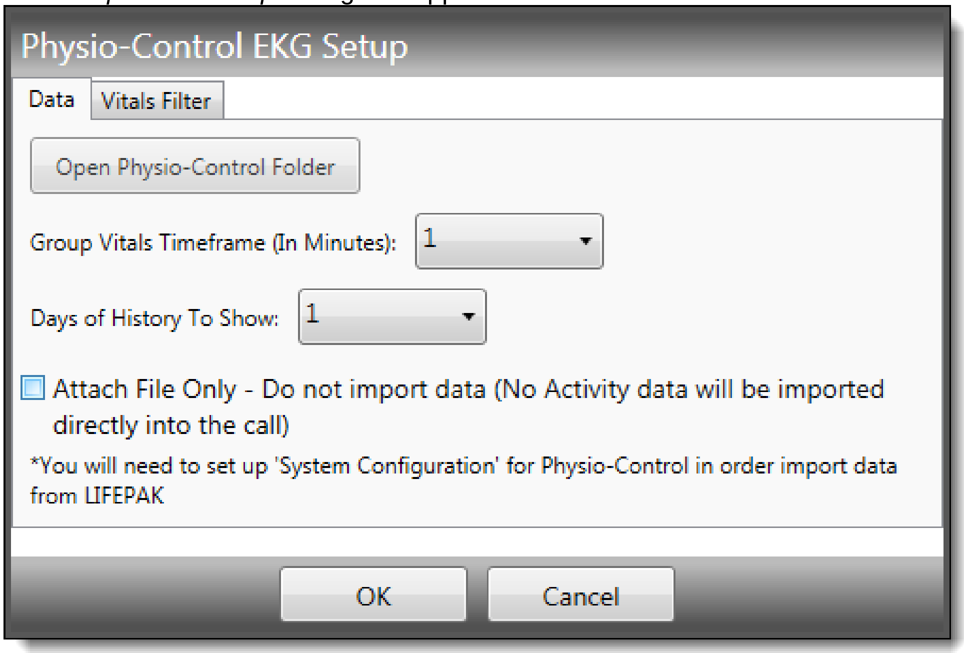
Setting Up a Physio EKG Monitor on the Field Bridge

Once the CODE-STAT Suite for Physio EKGs is installed on your computer, you will have the option to begin setup of the Physio EKG on the Field Bridge. Additional steps will be required using Physio's software after completing the Field Bridge setup. For additional information, please refer to the Field Bridge/Physio EKG Setup Guide.

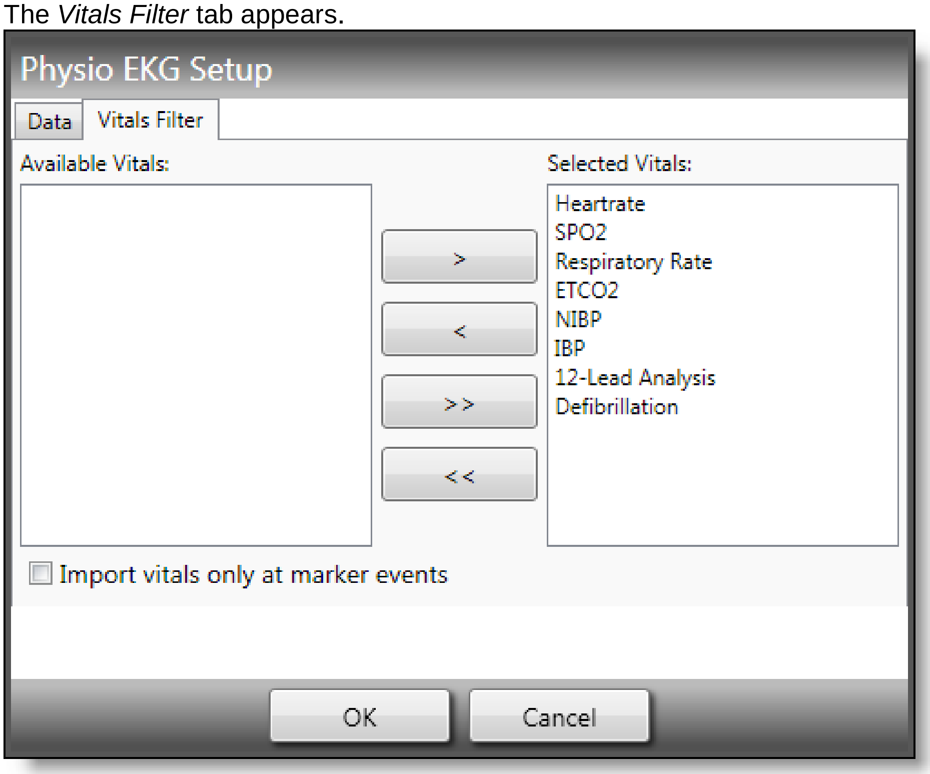
1. In the Field Bridge, from the left menu of the dashboard, click *Administrative Options.*
   The *Options* page appears.
2. Select the *EKG* tab.
   The *EKG* tab appears.

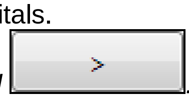


3. For the *Physio* options, select *Setup.*
   The *Philips EKG Setup* dialog box appears.

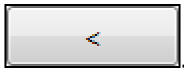


4. **OPTIONAL**: To view the folder in which your files will be stored, click *Open Folder.*
5. Select the *Vitals Filter* tab.
   The *Vitals Filter* tab appears.



6. To select vitals that should be imported, from the *Available Vitals* section, select the desired vitals.
7. Click *Add* 

.

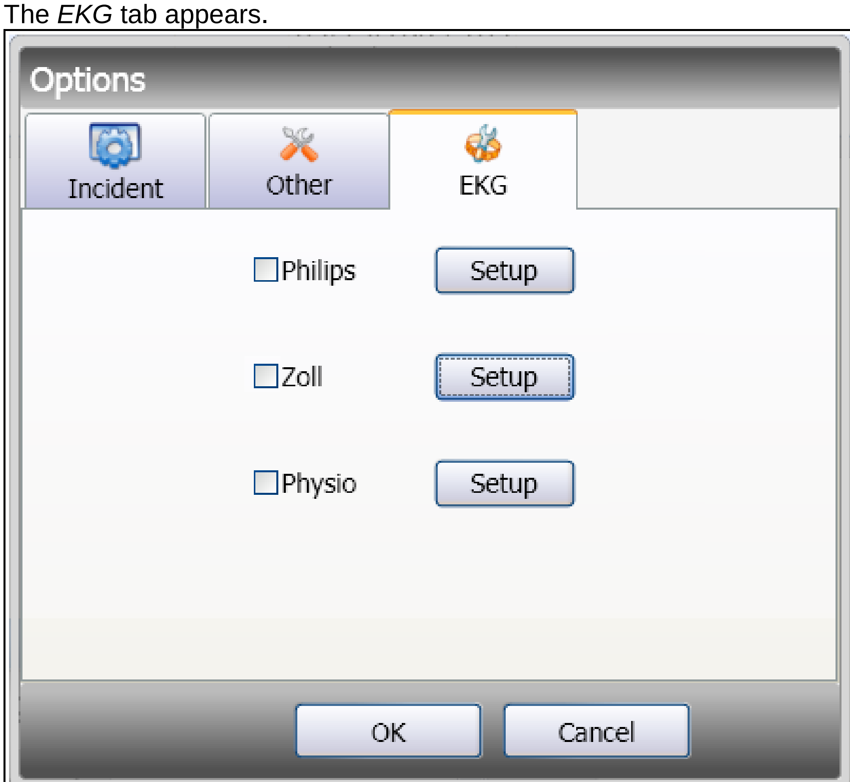
8. To select vitals that should not be imported, from the *Selected Vitals* section, select the undesired vitals.
9. Click *Remove* 

.
10. To choose to import vitals only at marker events, select the *Import vitals only at marker events* checkbox.
11. When finished, click *OK.*

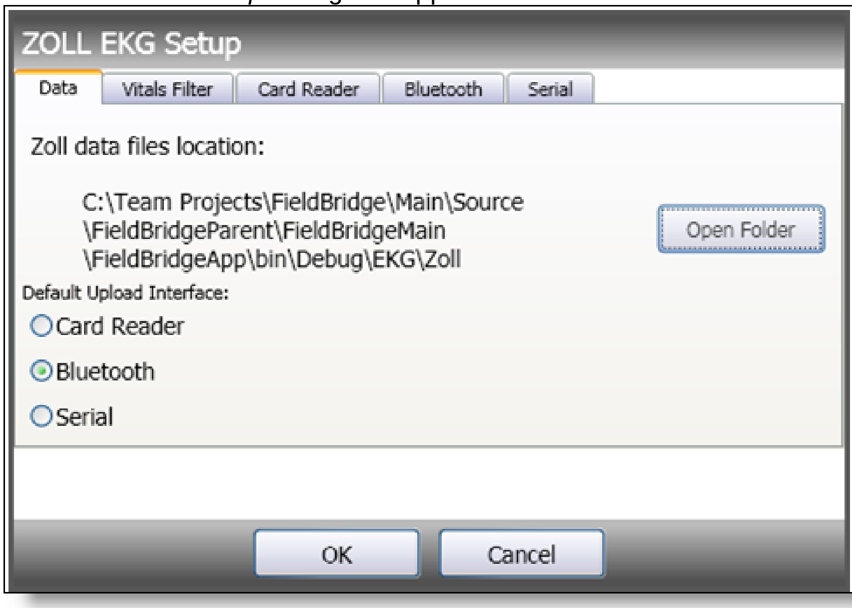
Setting Up a ZOLL EKG Monitor on the Field Bridge

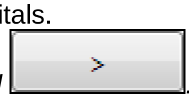
Once the code511.exe file for the ZOLL EKG monitor is installed, you will have the option to begin setup of the ZOLL EKG on the Field Bridge. Additional steps will be required using the ZOLL monitor in order to find the correct values for the Field Bridge setup. For additional information, please refer to the Field Bridge/ZOLL EKG Setup Guide.

1. In the Field Bridge, from the left menu of the dashboard, click *Administrative Options.* The *Options* page appears.
2. Select the *EKG* tab. The *EKG* tab appears.



3. For the *Zoll* option, click *Setup.*
   The *ZOLL EKG Setup* dialog box appears.

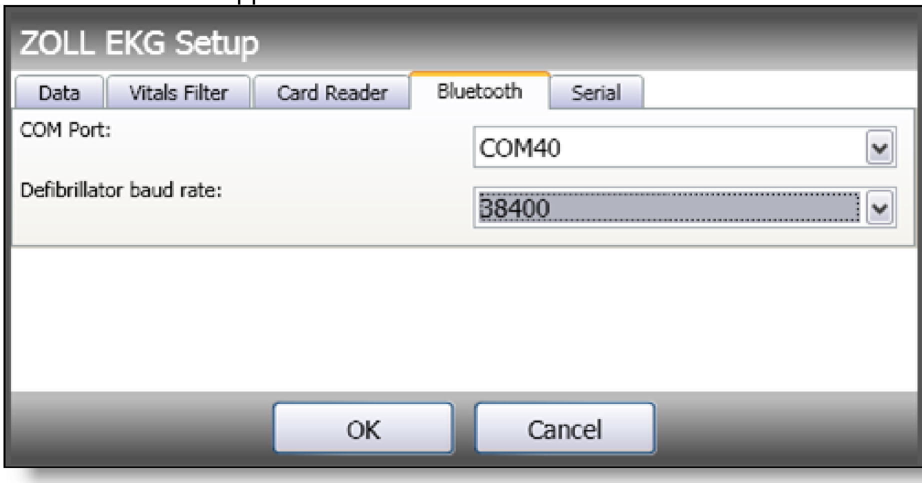


4. In the *Default Upload Interface* section, select the way that data will be uploaded most often.
5. Select the *Vitals Filter* tab.
   The *Vitals Filter* tab appears.
6. To select vitals that should be imported, from the *Available Vitals* section, select the desired vitals.
7. Click *Add* 

.
8. To select vitals that should not be imported, from the *Selected Vitals* section, select the undesired vitals.
9. Click *Remove* 

.
10. To choose to import vitals only at marker events, select the *Import vitals only at marker events* checkbox.
11. To configure card reader settings,
    a. Select the *Card Reader* tab.
    b. Select the *Internal* or *External* option, as appropriate.
    c. Ensure that all settings are correct.
12. To configure Bluetooth settings,

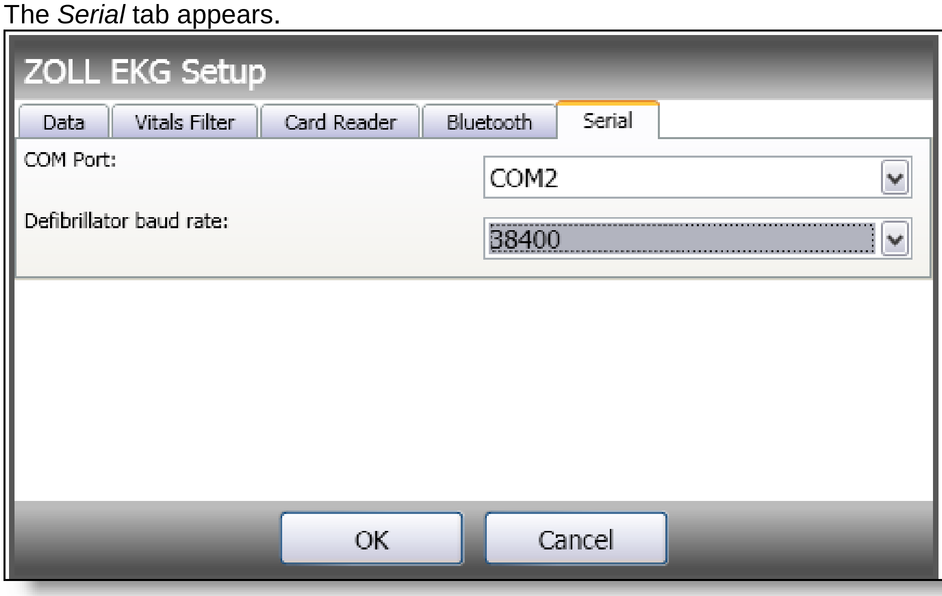
a. Select the *Bluetooth* tab.
The *Bluetooth* tab appears.



b. From the *COM Port* and *Defibrillator baud rate* drop down menus, select the appropriate information.

13. To configure serial settings,

a. Select the *Serial* tab.
The *Serial* tab appears.

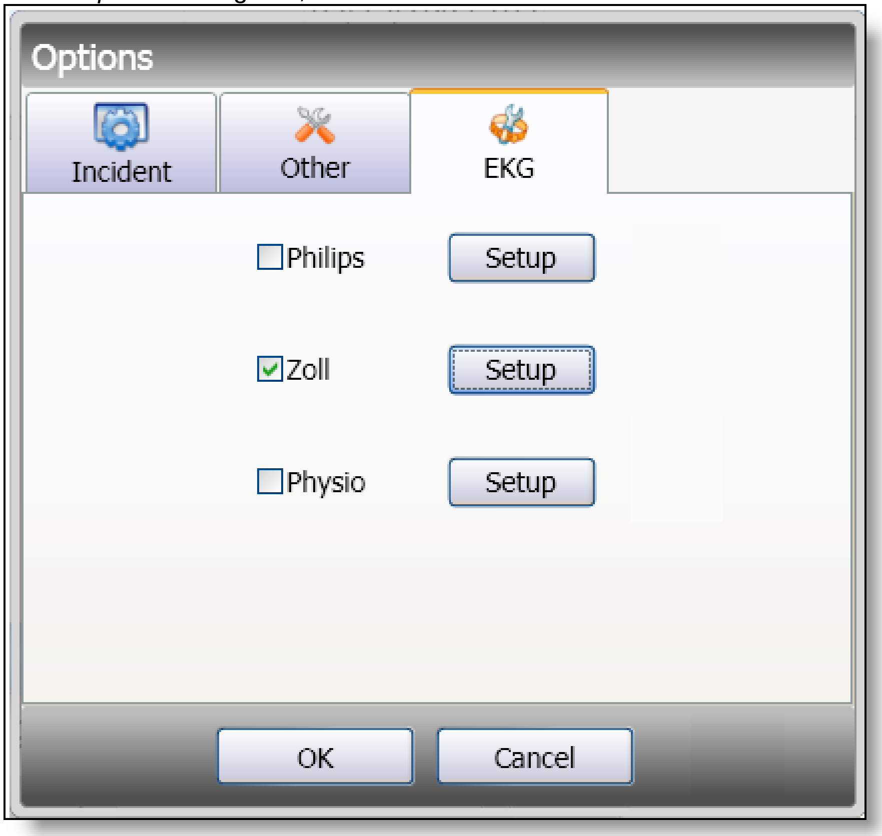


b. From the *Com Port* drop down menu, select the COM port for this monitor.
HINT: This is most likely COM1 or COM2.

c. From the *Defibrillator baud rate* drop down menu, select the baud rate.
HINT: This was found while getting settings from the monitor.

14. When finished configuring all desired import methods, click *OK.*

15. In the *Options* dialog box, select the *Zoll* checkbox.



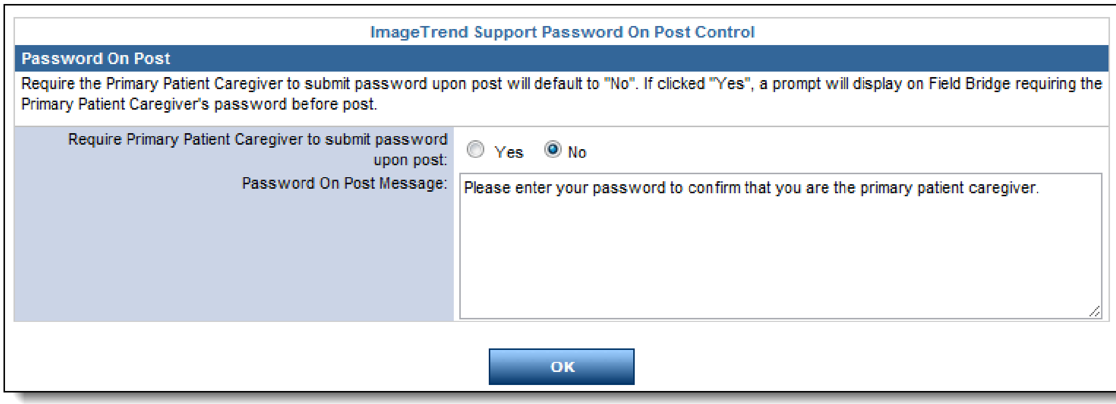
16. Click *OK.*
    The *Options* dialog box closes.

6.7 Requiring Passwords for Posting

You can set Field Bridge up to require the primary patient caregiver(s) to enter their passwords each time they post a run report. If there are multiple primary patient caregivers, all will be required to enter their password. You can also customize the message that appears asking for the password.

1. In the Web-based system, from the top left, click *My Service* or *My Fire Department.*
2. Select the *Setup* tab.
3. Under the *Field Bridge* section, select *Preferences.*
   A sub-menu appears.

4. Under *Preferences,* click *Password on Post.*
   The *Password on Post* page appears.



5. To require the patient caregivers' password before an incident can be posted, in the *Require Primary Patient Caregiver to submit password upon post* section, click *Yes.*
6. In the *Password On Post Message* text box, type the message that will ask the caregiver to enter his or her password.
7. Click *OK.*
   The settings are applied.

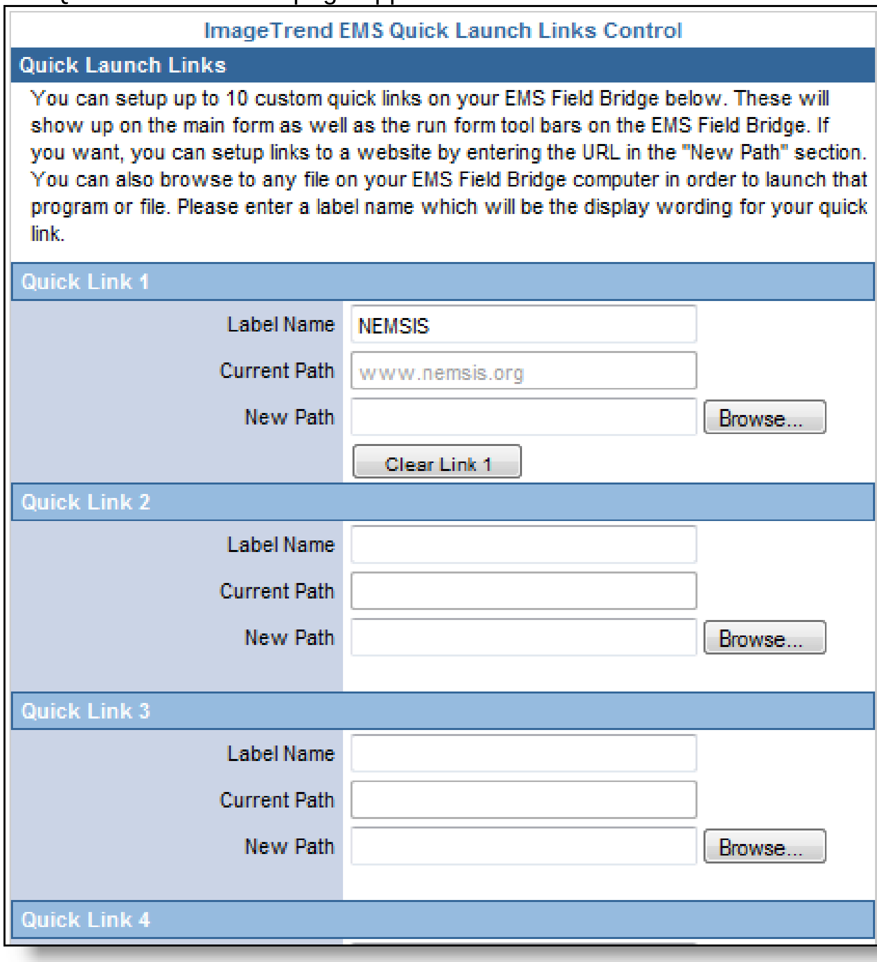
6.8 Setting Up Quick Launch Links

Using the Service Bridge, administrators can set up links to applications or websites that will open from the *Quick Launch* button in the Field Bridge. In order for this option to work with applications, the applications must be located in the same location on each computer with the Field Bridge and the administrator must know the path to that application (e.g., C:\Program Files\Microsoft Office\Office12\Word.exe).

NOTE: Quick launch links may not work correctly if using Internet Explorer 7 or higher.

1. In the Web-based system, from the top left, click *My Service* or *My Fire Department.*
2. Select the *Setup* tab*.*
3. Under the *Field Bridge* section, select *Non Run Form Resources.*
   A sub-menu appears.

4. Under *Non Run Form Resources,* click *Quick Launch Links.*
   The *Quick Launch Links* page appears.



5. For the next blank link, or for a link to be replaced, in the *Label Name* text box, type the text that will appear in the *Quick Launch* menu for this application or website.
6. In the *New Path* text box, type the link or click *Browse…* to navigate to a location on your computer.
   HINT: It may be most effective to copy the path from a computer running the Field Bridge to avoid errors.
7. When finished, click *OK.*

6.9 Working with Custom Reports and Narratives

Administrators have the option to deactivate certain reports or narratives if they are not used, or for advanced users, to edit or upload customized reports or narratives.

The Web-based system controls the reports and narratives that are available for both the Web-based system and the Field Bridge system. The reports and narratives available for the Web-based system are by default applied to the Field Bridge list, although that list can be changed so that different reports and narratives are available from the Field Bridge or the Web-based system.

Deactivating Specific Reports or Narratives

If there are certain reports or narratives that your service does not use or that you would like to be unavailable from the Field Bridge, you can deactivate them using the Web-based system.

1. In the Web-based system, from the top left, click *My Service* or *My Fire Department.*
2. Select the *Setup* tab*.*
3. Under the *Field Bridge* section, select *Non Run Form Resources.*
   A sub-menu appears.
4. Under *Non Run Form Resources,* click *PDF Reports & Narratives.*
   The *Manage ImageTrend EMS Field Bridge Reports & Narratives* page appears.

Manage ImageTrend EMS Field Bridge Reports & Narratives

This page is used to manage the reports (Prehospital Care Reports, Billing Reports, Consent and Authorization Forms etc.), narratives and narrative questions on the ImageTrend EMS Field Bridge. Customized Prehospital care reports or narratives can be uploaded here by browsing to the customized file and clicking the upload button below. All active files will synchronize to the EMS Field Bridge upon the next successful post. The reports and narratives can be activated or deactivated by clicking the ☐ icon under the "Active" column. To automatically download the reports and narratives that are set up on the system by the system administrator, please click on the "Get System Narratives and Reports" button at the bottom of the page.

File Name	User Updated	Date Updated	Active	Transfer PDF
XSL PDF Reports (83)				
2009 Prehospital Care Report	ImageTrend Admin	05/29/12 16:13	☐	☐
2009_Prehospital_Care_Report	ImageTrend Admin	05/29/12 16:13	☐	☐
A Prehospital_Care_Report_Temperatures	ImageTrend Admin	05/29/12 16:13	☐	☐
AirCare Patient Care Report	ImageTrend Admin	05/29/12 16:13	☑	☐
Billing Report	ImageTrend Admin	05/29/12 16:13	☐	☐
Billing Report (Large Font)	ImageTrend Admin	05/29/12 16:13	☐	☐
Billing Report_With All Signatures	ImageTrend Admin	05/29/12 16:13	☑	☐
Billing Report_With All Signatures (Large Font)	ImageTrend Admin	05/29/12 16:13	☐	☐
CC_Complete	ImageTrend Admin	05/29/12 16:13	☑	☐
Comprehensive Report	ImageTrend Admin	05/29/12 16:13	☐	☐
Comprehensive Report Trauma Registry Oregon	ImageTrend Admin	05/29/12 16:13	☐	☐
Comprehensive Report Trauma Registry Oregon Without Billing	ImageTrend Admin	05/29/12 16:13	☐	☐
Comprehensive Report Without Billing	ImageTrend Admin	05/29/12 16:13	☐	☐
Comprehensive_Report	ImageTrend Admin	05/29/12 16:13	☑	☐
Controlled+Substance+Requisition	ImageTrend Admin	05/29/12 16:13	☑	☐
EBREMS_Billing_Report	ImageTrend Admin	05/29/12 16:13	☐	☐

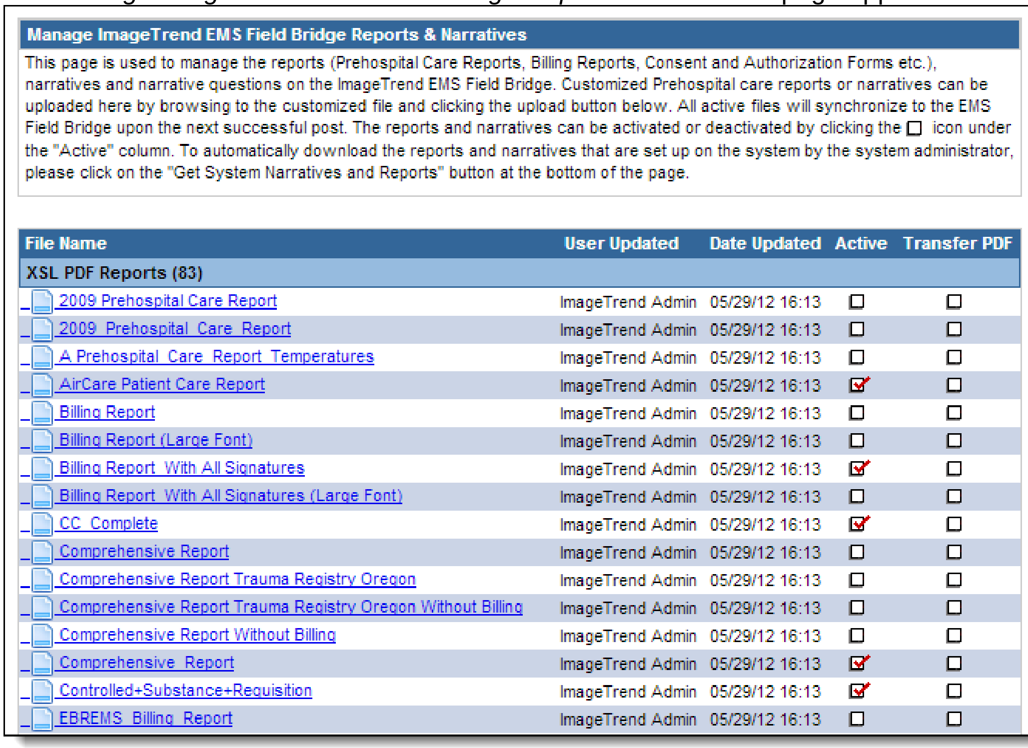
5. For the report(s) or narrative(s) to deactivate, deselect the *Active* checkbox.
   The report(s) or narrative(s) are deactivated and will not be available for use from the Field Bridge.
   NOTE: If these reports or narratives were previously available for use, they will not be removed until each Field Bridge system syncs.

Enabling the Default List of Reports and Narratives

If you have set up different reports and narratives to be available from the Field Bridge as from the Web-based system, you have the option of resetting the available reports and narratives to be the same as those set up for the Web-based system.

1. In the Web-based system, from the top left, click *My Service* or *My Fire Department.*
2. Select the *Setup* tab*.*
3. Under the *Field Bridge* section, select *Non Run Form Resources.*
   A sub-menu appears.

4. Under *Non Run Form Resources,* click *PDF Reports & Narratives.*
   The *Manage ImageTrend EMS Field Bridge Reports & Narratives* page appears.



Manage ImageTrend EMS Field Bridge Reports & Narratives

This page is used to manage the reports (Prehospital Care Reports, Billing Reports, Consent and Authorization Forms etc.), narratives and narrative questions on the ImageTrend EMS Field Bridge. Customized Prehospital care reports or narratives can be uploaded here by browsing to the customized file and clicking the upload button below. All active files will synchronize to the EMS Field Bridge upon the next successful post. The reports and narratives can be activated or deactivated by clicking the icon under the "Active" column. To automatically download the reports and narratives that are set up on the system by the system administrator, please click on the "Get System Narratives and Reports" button at the bottom of the page.

File Name	User Updated	Date Updated	Active	Transfer PDF
XSL PDF Reports (83)				
2009 Prehospital Care Report	ImageTrend Admin	05/29/12 16:13		
2009_Prehospital_Care_Report	ImageTrend Admin	05/29/12 16:13		
A Prehospital_Care_Report_Temperatures	ImageTrend Admin	05/29/12 16:13		
AirCare Patient Care Report	ImageTrend Admin	05/29/12 16:13		
Billing Report	ImageTrend Admin	05/29/12 16:13		
Billing Report (Large Font)	ImageTrend Admin	05/29/12 16:13		
Billing Report_With All Signatures	ImageTrend Admin	05/29/12 16:13		
Billing Report_With All Signatures (Large Font)	ImageTrend Admin	05/29/12 16:13		
CC_Complete	ImageTrend Admin	05/29/12 16:13		
Comprehensive Report	ImageTrend Admin	05/29/12 16:13		
Comprehensive Report Trauma Registry Oregon	ImageTrend Admin	05/29/12 16:13		
Comprehensive Report Trauma Registry Oregon Without Billing	ImageTrend Admin	05/29/12 16:13		
Comprehensive Report Without Billing	ImageTrend Admin	05/29/12 16:13		
Comprehensive_Report	ImageTrend Admin	05/29/12 16:13		
Controlled+Substance+Requisition	ImageTrend Admin	05/29/12 16:13		
EBREMS_Billing_Report	ImageTrend Admin	05/29/12 16:13		

5. Click *Get System Narratives and Reports.*
   A confirmation dialog box appears.
6. Click *Yes.*
   The reports and narratives are reset to be the same as those set up for the Service Bridge.

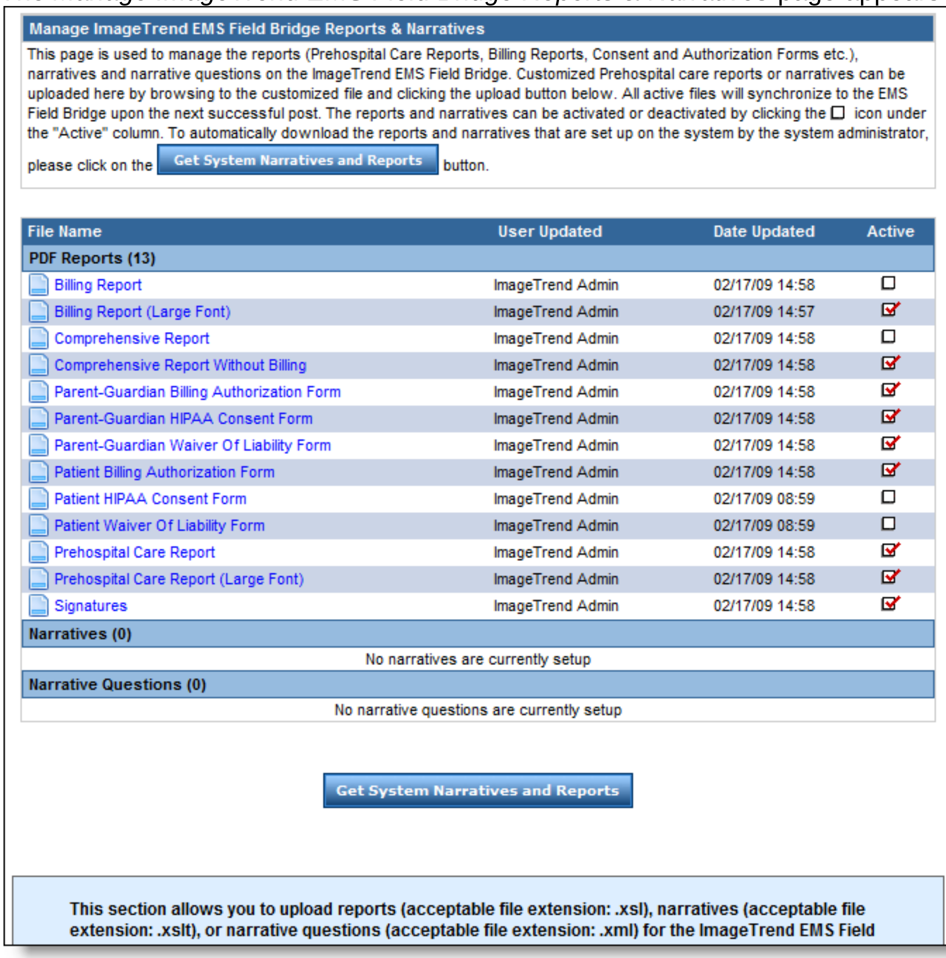
Uploading New Reports and Narratives

People who have knowledge of XML, XSL, XSLT and ImageTrend's reports and narratives can create custom reports, narratives and narrative questions. ImageTrend recommends not creating new reports and narratives unless you are extremely familiar with the data structure and reports and narratives used for the Web-based system and Field Bridge. Once these files have been created, you can upload them to the Web-based system to be distributed to the Field Bridge. After uploading a new report, narrative or narrative question, be sure to select whether this file should be active or inactive.

This option is useful for uploading reports, narrative or narrative questions that will only be available for the Field Bridge. Please keep in mind that if you enable the default reports and narratives, this will delete any custom reports or narratives uploaded in this way.

1. In the Web-based system, from the top left, click *My Service* or *My Fire Department.*
2. Select the *Setup* tab*.*
3. Under the *Field Bridge* section, select *Non Run Form Resources.*
   A sub-menu appears.

4. Under *Non Run Form Resources,* click *PDF Reports & Narratives.*
   The *Manage ImageTrend EMS Field Bridge Reports & Narratives* page appears.



Manage ImageTrend EMS Field Bridge Reports & Narratives

This page is used to manage the reports (Prehospital Care Reports, Billing Reports, Consent and Authorization Forms etc.), narratives and narrative questions on the ImageTrend EMS Field Bridge. Customized Prehospital care reports or narratives can be uploaded here by browsing to the customized file and clicking the upload button below. All active files will synchronize to the EMS Field Bridge upon the next successful post. The reports and narratives can be activated or deactivated by clicking the ☐ icon under the "Active" column. To automatically download the reports and narratives that are set up on the system by the system administrator, please click on the Get System Narratives and Reports button.

File Name	User Updated	Date Updated	Active
PDF Reports (13)			
Billing Report	ImageTrend Admin	02/17/09 14:58	☐
Billing Report (Large Font)	ImageTrend Admin	02/17/09 14:57	☑
Comprehensive Report	ImageTrend Admin	02/17/09 14:58	☐
Comprehensive Report Without Billing	ImageTrend Admin	02/17/09 14:58	☑
Parent-Guardian Billing Authorization Form	ImageTrend Admin	02/17/09 14:58	☑
Parent-Guardian HIPAA Consent Form	ImageTrend Admin	02/17/09 14:58	☑
Parent-Guardian Waiver Of Liability Form	ImageTrend Admin	02/17/09 14:58	☑
Patient Billing Authorization Form	ImageTrend Admin	02/17/09 14:58	☑
Patient HIPAA Consent Form	ImageTrend Admin	02/17/09 08:59	☐
Patient Waiver Of Liability Form	ImageTrend Admin	02/17/09 08:59	☐
Prehospital Care Report	ImageTrend Admin	02/17/09 14:58	☑
Prehospital Care Report (Large Font)	ImageTrend Admin	02/17/09 14:58	☑
Signatures	ImageTrend Admin	02/17/09 14:58	☑
Narratives (0)			
No narratives are currently setup			
Narrative Questions (0)			
No narrative questions are currently setup			

Get System Narratives and Reports

This section allows you to upload reports (acceptable file extension: .xsl), narratives (acceptable file extension: .xslt), or narrative questions (acceptable file extension: .xml) for the ImageTrend EMS Field

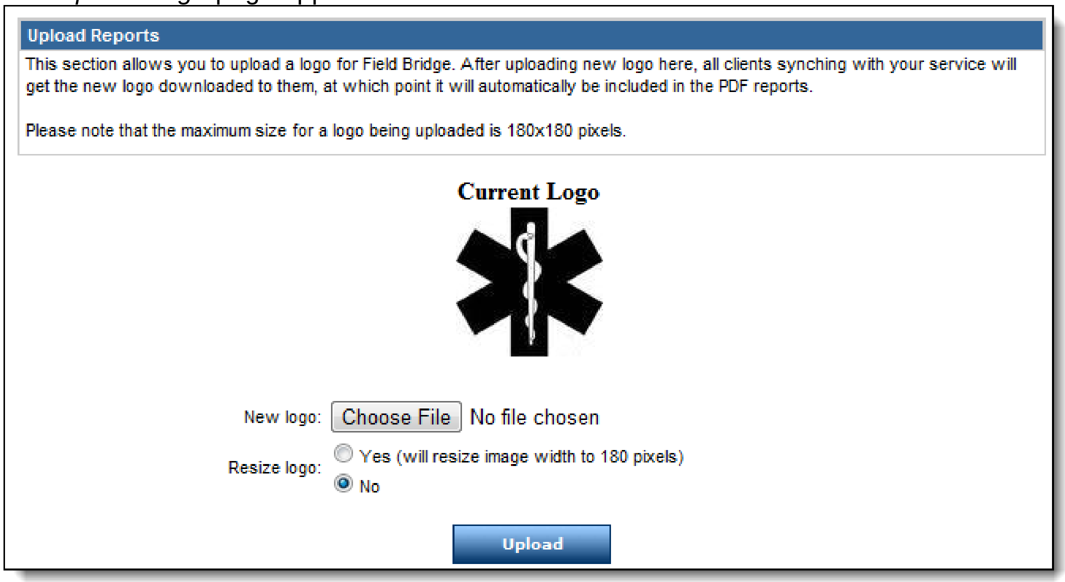
5. In the last section on the pace, in the *New file* section, click *Browse…*
   The *Choose File* dialog box appears.
6. Navigate to and select the desired file.
7. Click *Open.*
   The *Choose File* dialog box closes.
8. Click *Upload.*
   The file is added to the list of reports, narratives or narrative questions.

6.10 Uploading Logos for Reports

You can upload your service's logo to be printed on any reports from the Field Bridge systems.

1. In the Web-based system, from the top left, click *My Service* or *My Fire Department.*
2. Select the *Setup* tab.
3. Under the *Field Bridge* section, select *Non Run Form Resources.*
   A sub-menu appears.

4. Under *Non Run Form Resources,* click *Upload Report Logo.*
   The *Upload Logo* page appears.

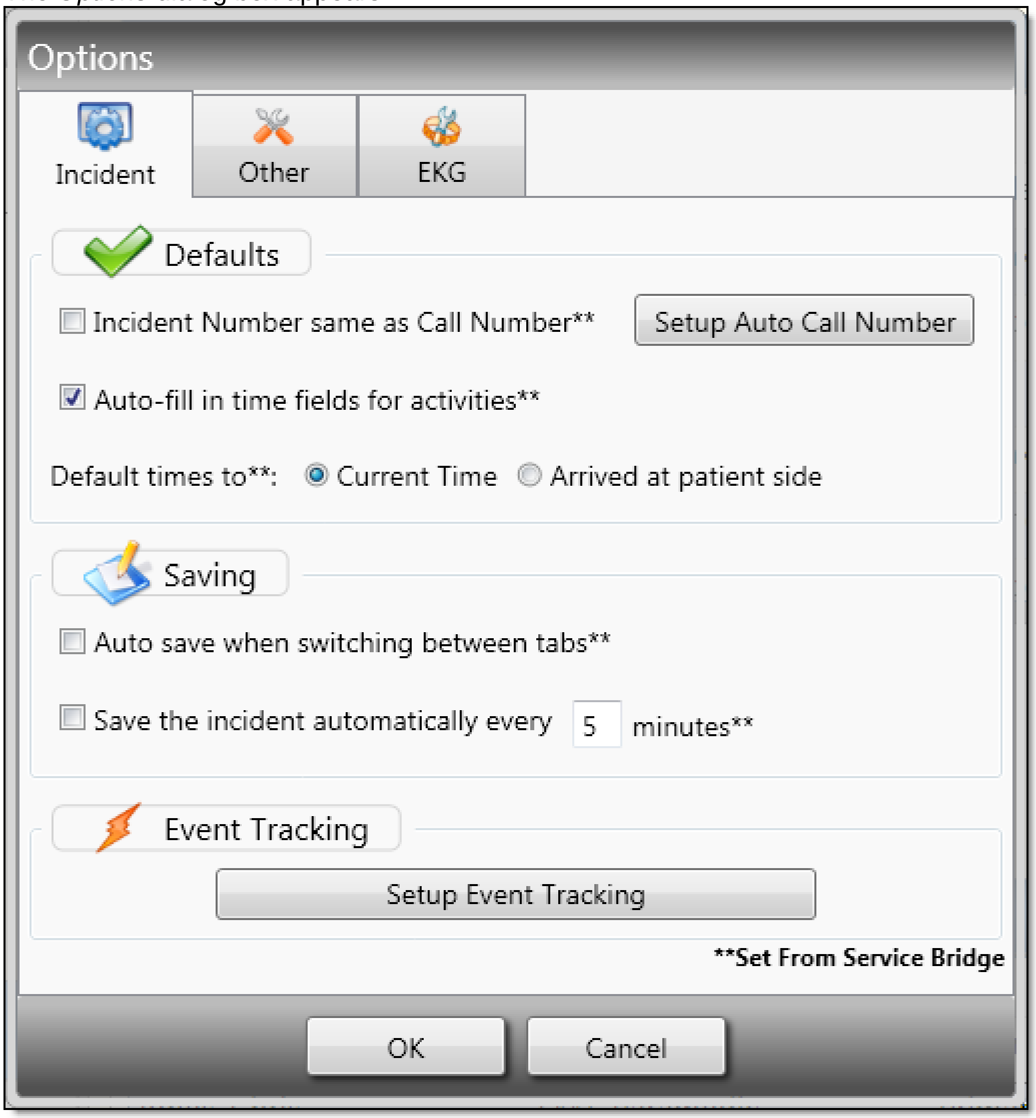


5. In the *New Logo* section, click *Choose File…*
   The *Choose file* dialog box appears.
6. Navigate to and select the desired logo document.
7. Click *Open.*
   The *Choose file* dialog box closes.
8. Click *Upload.*
   The file is uploaded and will be sent to each Field Bridge when it syncs.

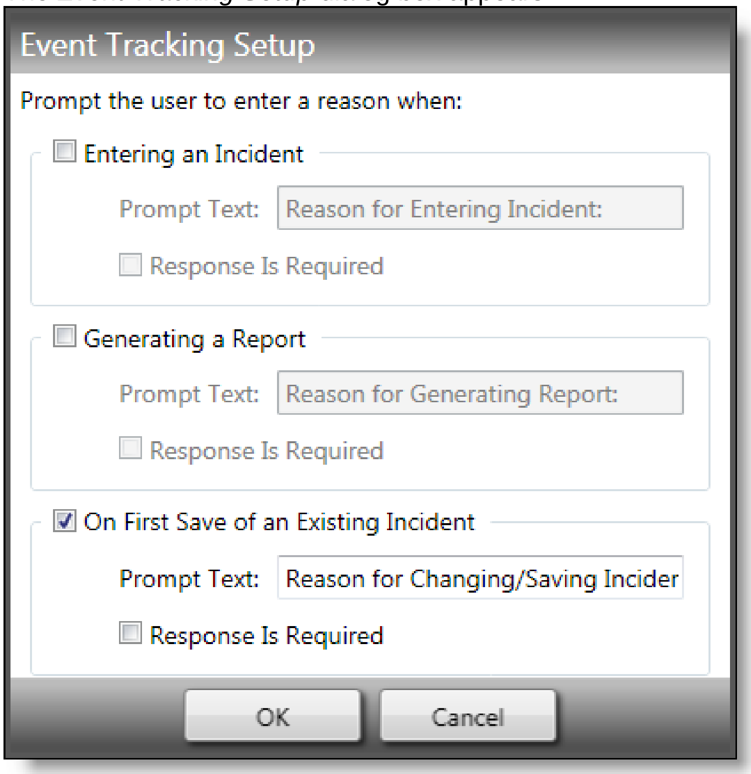
6.11 Setting Up Event Tracking

As the administrator, you have the ability to select which events are tracked for auditing in each Field Bridge. These settings must be set up individually for each Field Bridge.

1. In the Field Bridge, from the left menu of the dashboard, click *Administrative Options.* The *Options* dialog box appears.



2. In the *Event Tracking* section, click *Setup Event Tracking.*
   The *Event Tracking Setup* dialog box appears.



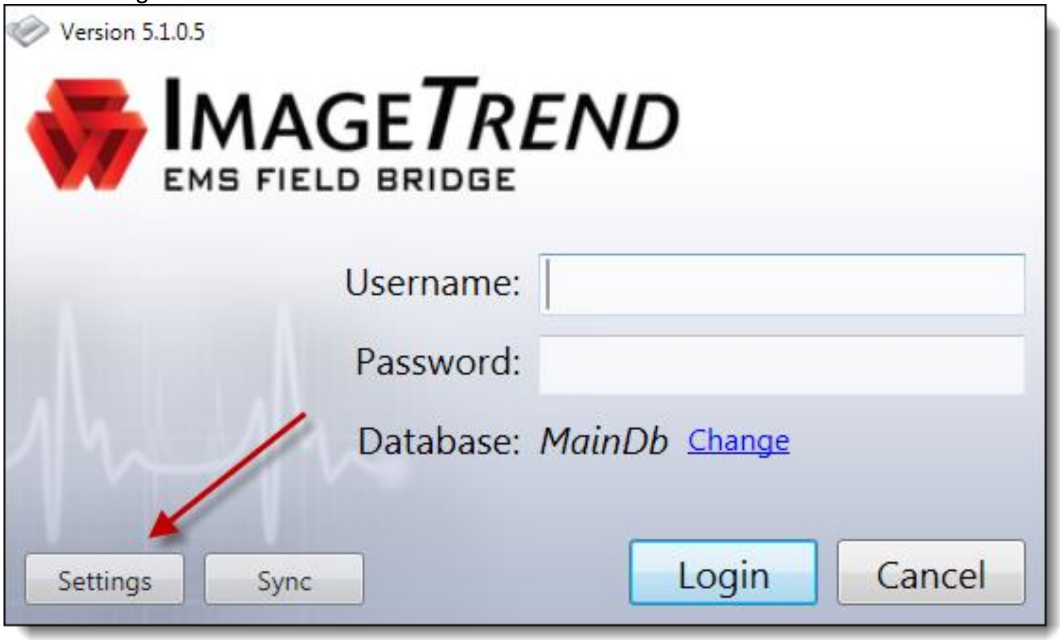
3. For each section, to track the event and/or request a reason for the event, select the checkbox.
   OR
   To allow users to perform this action without tracking or requiring a reason, deselect the checkbox.
4. To change or enter text requesting the user performing this action for their reason, in the appropriate *Prompt Text* text box(es), type the desired message.
5. To require a user to enter a reason before moving on, select the appropriate *Response Is Required* checkbox(es).
6. When finished, click *OK.*

6.12 Setting Up a Database Connection

Before logging in, Field Bridge users with the correct permissions may send information from the Field Bridge to another database in addition to the standard database used with the application. This can be used to create a backup or to send information to another user.

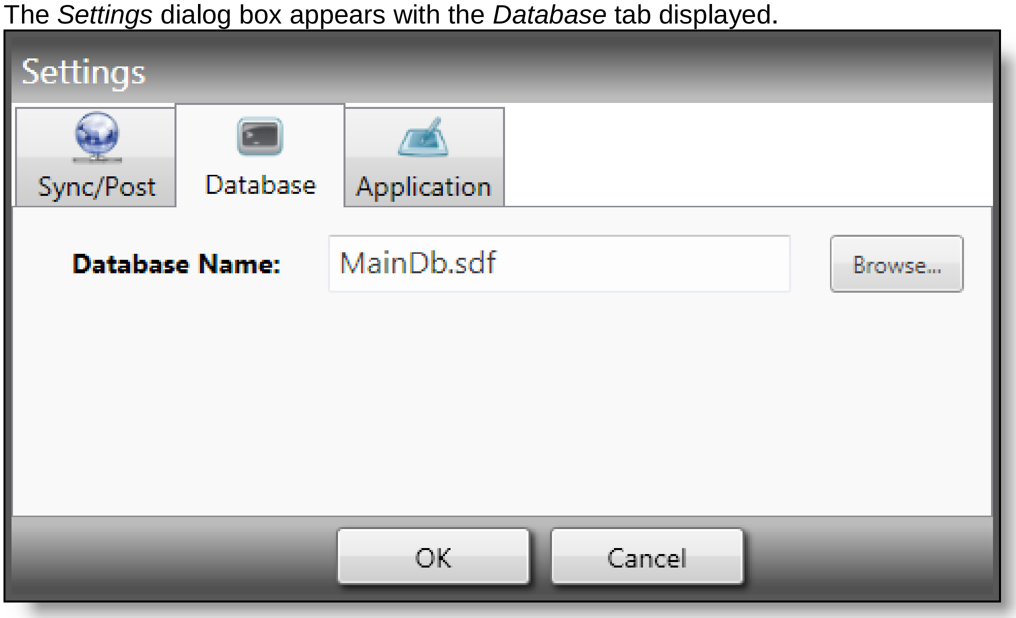
1. Before logging in to the Field Bridge, from the *Login* screen, from the *Database* section, click *Change.*
   OR

a. Click *Settings.*



The *Settings* page appears.

b. Select the *Database* tab.
The *Settings* dialog box appears with the *Database* tab displayed.



2. In the *Database Name* section, click *Browse…*
   The *Choose file* dialog box appears.
3. Navigate to and select the desired database.
4. Click *Open.*
   The *Choose file* dialog box closes.
5. Click *Upload.*
   The database is selected

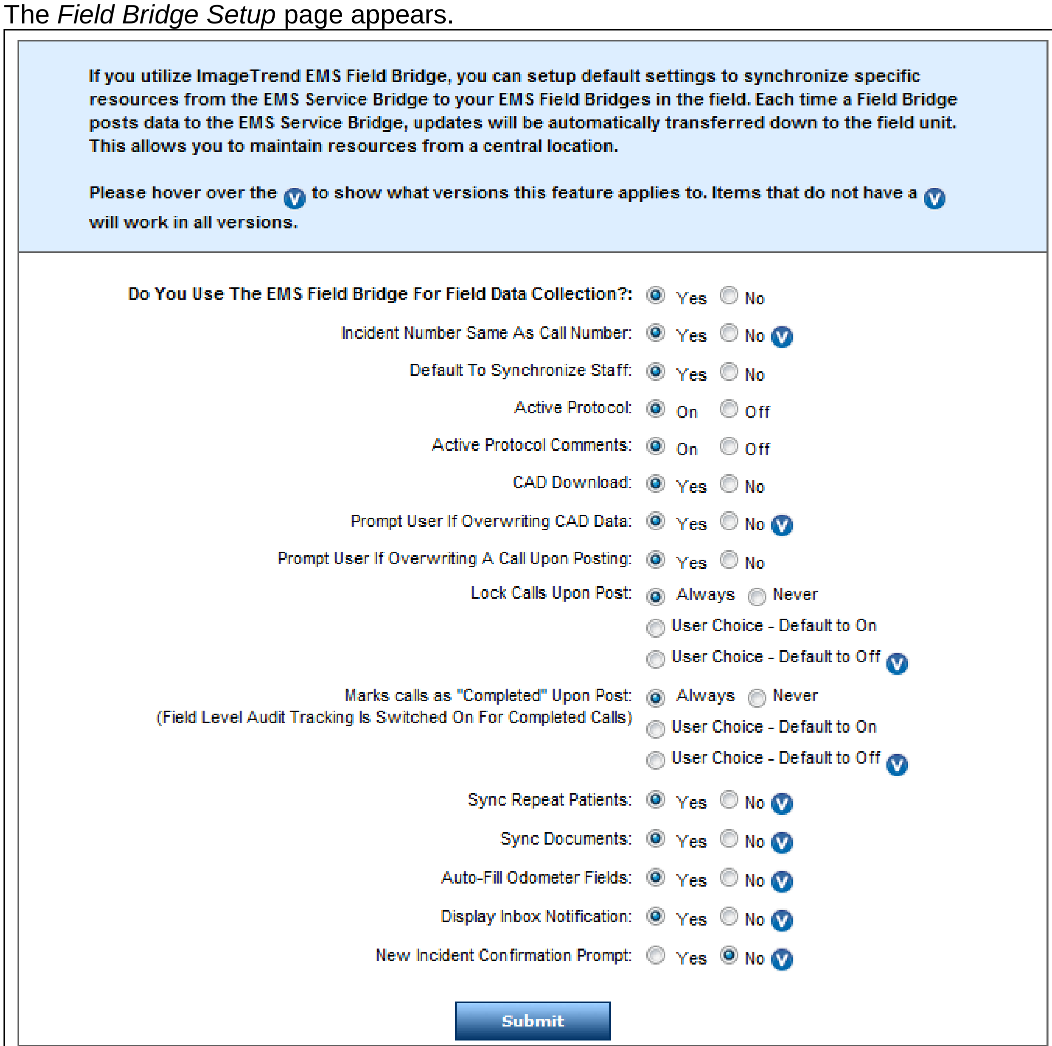
6.13 Adding a Document to the Field Bridge Resources

Administrators can add documents to the Field Bridge resources available to users using the Web-based system. Before documents will be synced to the Field Bridge, you must have document syncing turned on. All documents that have been uploaded to the Web-based system in the *Documents* section will then be synced to the Field Bridge systems.

Allowing Document Syncing

You can set up document syncing when setting up options to sync to the Field Bridge.

1. In the Web-based system, from the top left, click *My Service* or *My Fire Department.*
2. Select the *Setup* tab*.*
3. Under the *Field Bridge* section, select *Preferences.*
   A sub-menu appears.
4. Under *Preferences,* click *General.*
   The *Field Bridge Setup* page appears.

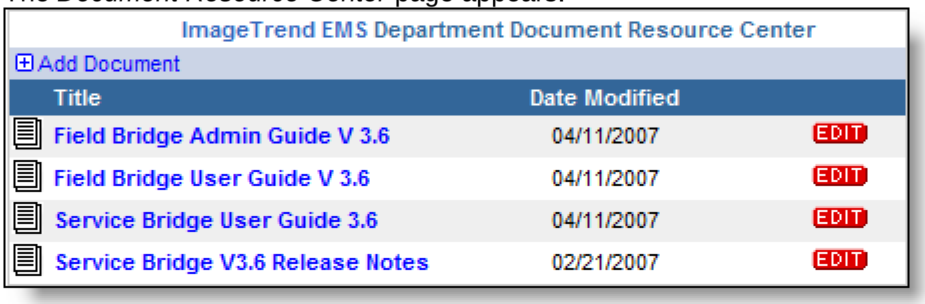


5. To copy documents available on the Web-based system to the Field Bridge, in the *Sync Documents* section, select *Yes.*
6. When finished, click *Submit.*
   The information to be copied to the Field Bridge on syncing is set.

Uploading Documents to Sync to the Field Bridge

Any document that is uploaded to the Web-based system will be synced to the Field Bridge if document syncing is enabled. Type-in or URL documents will not be synced. Documents in this section can include protocols, reference guides or reports that all system users should be able to access.

1. In the Web-based system, from the top left, click *My Service* or *My Fire Department.*
2. Under the *Modules* tab, click *Documents.*
   The *Document Resource Center* page appears.



ImageTrend EMS Department Document Resource Center

Add Document

Title	Date Modified	
Field Bridge Admin Guide V 3.6	04/11/2007	EDIT
Field Bridge User Guide V 3.6	04/11/2007	EDIT
Service Bridge User Guide 3.6	04/11/2007	EDIT
Service Bridge V3.6 Release Notes	02/21/2007	EDIT

3. From the *(Service Name) Document Resource Center* table, click *Add Document.*
4. In the *Choose Document Type* table, select *Upload*.
   NOTE: Other types of documents can be made available on the Web-based system, but only uploaded documents can be synced to the Field Bridge.
5. Click *Submit.*
6. In the *Short Description* text box, type the name of the document.
7. In the *Path* section, click *Choose File.*
   The *Choose File* dialog box appears.
8. Navigate to and select the file to upload.
9. Click *Open*.
   The file is selected and the *Choose File* dialog box closes.
10. To sync this document to the *Documents* section in Field Bridge, in the *Sync to Field Bridge* section, select *Yes.*
11. To set this document up to display for easy selection in the *Attachments* window of a run form, in the *Display in Incident Attachments* section, select *Yes.*
12. Click *OK.*
    The document is uploaded.

CHAPTER 7

FIELD BRIDGE MAINTENANCE TASKS

7.1 Chapter Overview

The Field Bridge system may periodically require administrators to do some maintenance, from checking for updated to syncing with the Web-based system for new information. This chapter explains how to perform various maintenance tasks, including syncing, viewing and uploading error logs and checking for updates.

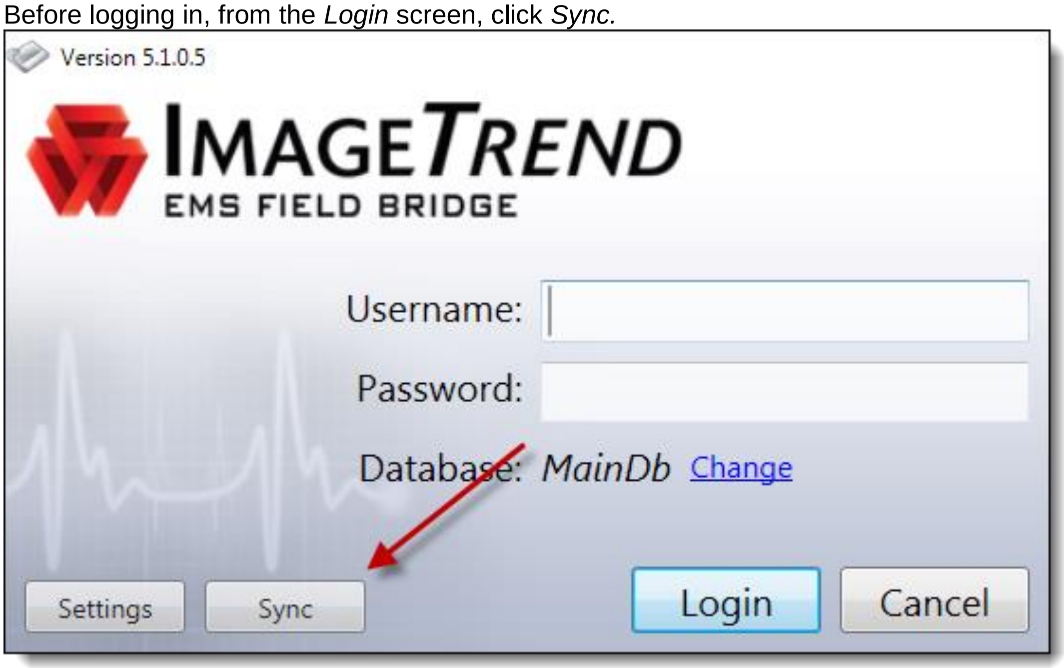
7.2 Syncing the Field Bridge

When any updates are done for Field Bridge data on the Web-based system (including new staff members, password changes or updated active protocols or power tool setup), you can sync your Field Bridge systems with the Web-based system to receive the updated information. You can sync either before or after logging in to the Field Bridge.

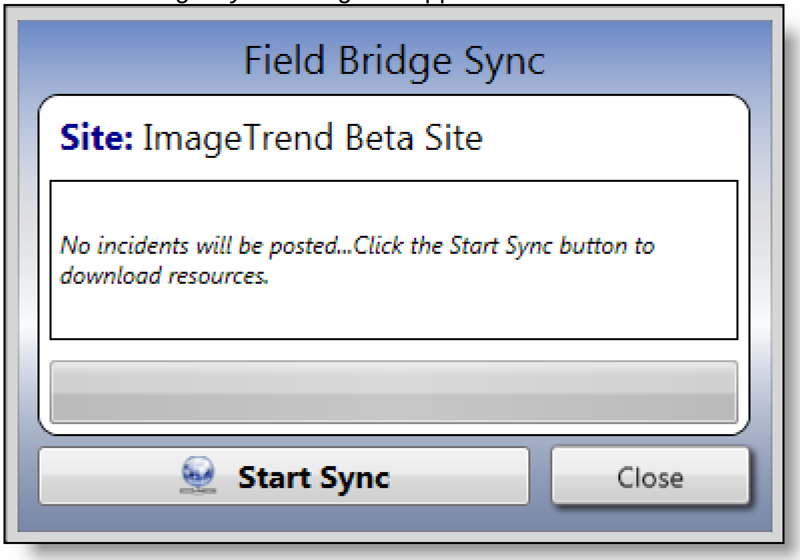
Syncing Before Logging In

Syncing before logging in to the Field Bridge is useful for when you have changed your password or are logging on as a new staff member. As long as your information is available in the Web-based system, you will be able to enter your new password or your login credentials to validate the sync (if necessary), even if the new information has not yet been synced to the Field Bridge.

1. Before logging in, from the *Login* screen, click *Sync.*



The *Field Bridge Sync* dialog box appears.

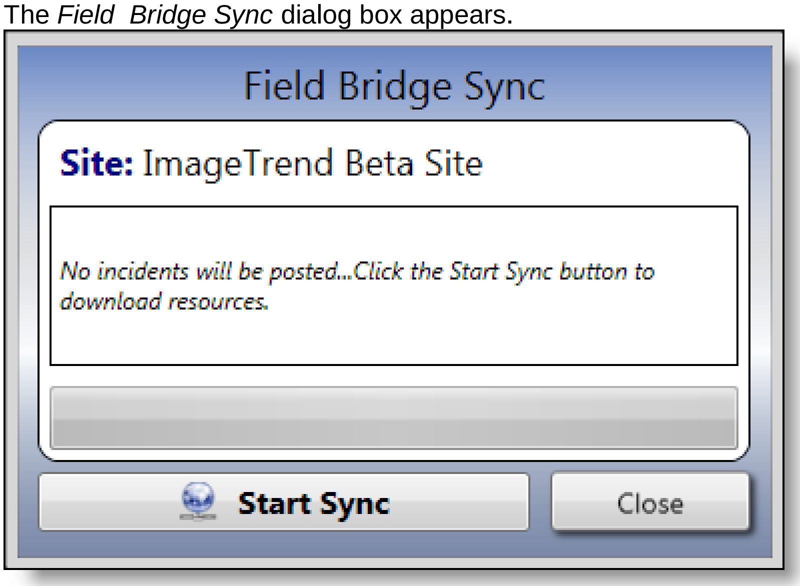


2. Click *Start Sync.*
   The sync is completed.
3. When the *Sync successfully finished* message is displayed, click *Close.*

Syncing After Logging In

You can also sync the system after logging in.

1. Once logged in to the Field Bridge, from the dashboard, from the left menu, click *Sync.*
   The *Field Bridge Sync* dialog box appears.

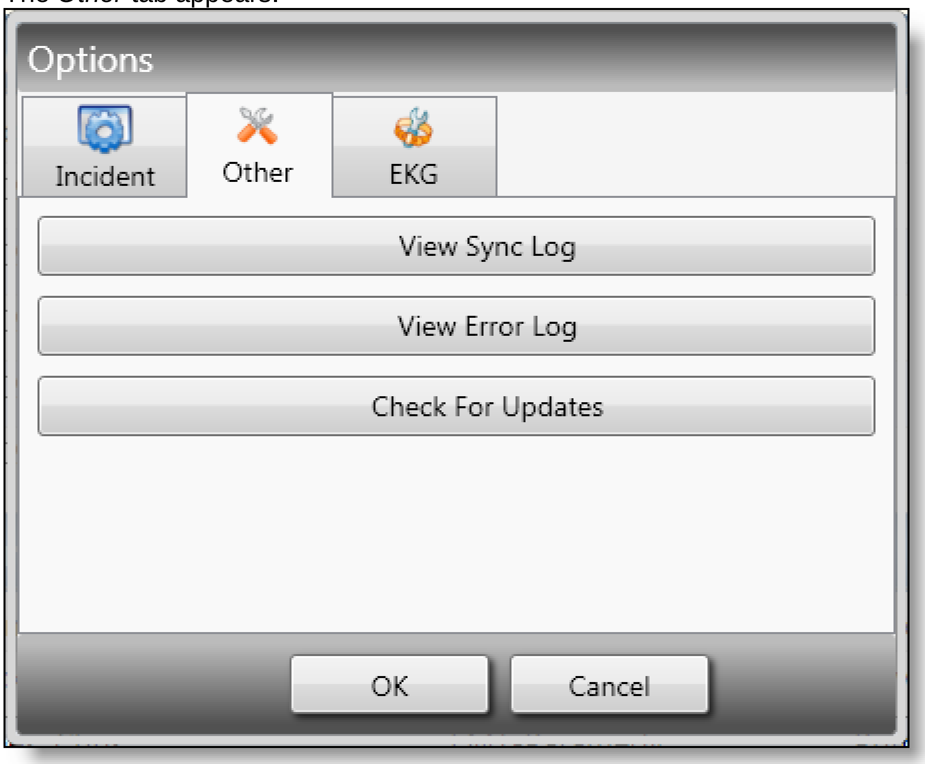


2. Click *Start Sync.*
   The system syncs.
3. When the *Sync successfully finished* message is displayed, click *Close.*

7.3 Viewing the Sync Log

The Field Bridge keeps a log of the date, time, success of sync and items synced for each time it is synced to the Service Bridge. Administrators can view this log, if necessary.

1. In the Field Bridge, from the left menu of the dashboard, click *Administrative Options.*
   The *Options* dialog box appears.
2. Select the *Other* tab.
   The *Other* tab appears.



3. Click *View Sync Log.*
   The *Sync Log* dialog box appears.
4. To view information about a particular sync, for that record, click *Open.*
5. When finished with the sync record, click *Close.*
6. When finished with the sync log, click *Close.*

7.4 Working with the Error Log

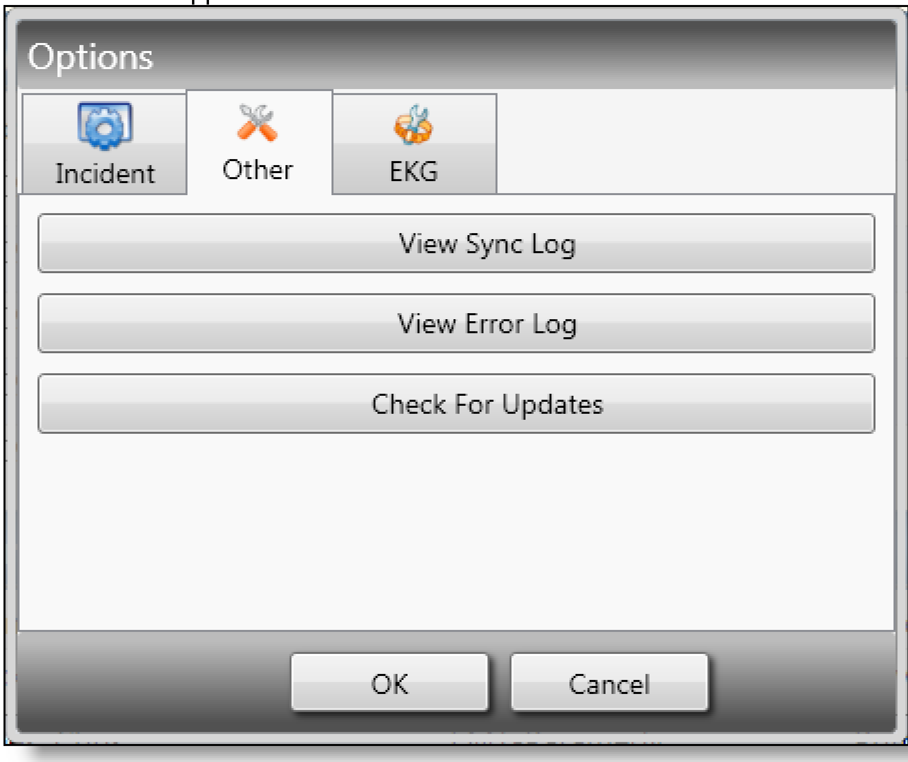
Any error that is generated while working with the Field Bridge will be saved in the error log. Administrators can view the error log for a particular Field Bridge on that Field Bridge system, upload an error log to the Web-based system or view submitted error logs from the Web-based system.

Viewing the Error Log: From the Field Bridge

When viewing the error log from a Field Bridge system, you will see errors generated on only that Field Bridge.

1. In the Field Bridge, from the left menu of the dashboard, click *Administrative Options.*
   The *Options* dialog box appears.

2. Select the *Other* tab.
   The *Other* tab appears.



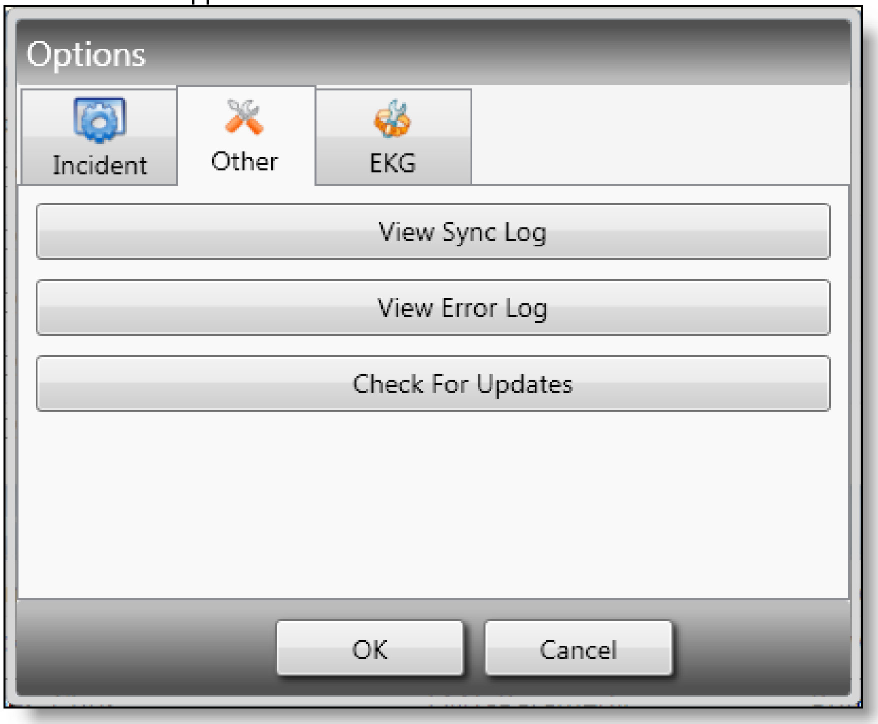
3. Click *View Error Log.*
   The *Error List* page appears.
4. To view a particular error, for that record, click *Open.*
5. When finished, to close the error window, click *Close.*
6. When finished viewing the error log, click *Close.*

Posting the Error Log

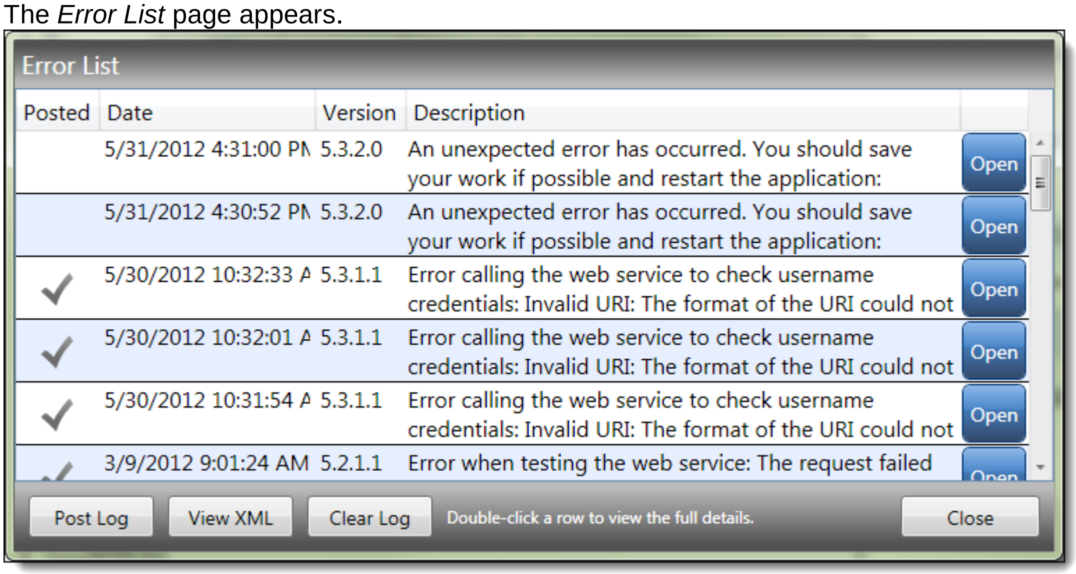
Each Field Bridge can post its error log to the Web-based system, allowing your service to keep a central repository of any error messages for support purposes.

1. In the Field Bridge, from the left menu of the dashboard, click *Administrative Options.*
   The *Options* dialog box appears.

2. Select the *Other* tab.
   The *Other* tab appears.



3. Click *View Error Log.*
   The *Error List* page appears.



4. Click *Post Log.*
   A confirmation dialog box appears.
5. Click *OK.*
6. When finished with the error log, click *Close.*

Viewing the Error Log: From the Web-Based System

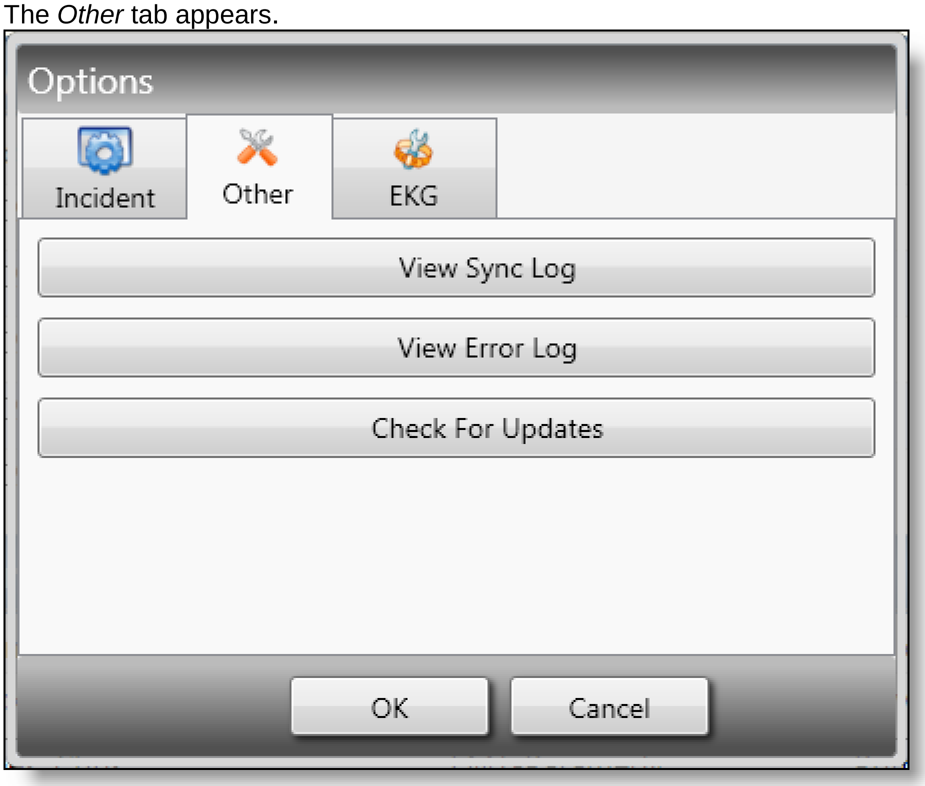
Once error logs have been posted to the Web-based system, you can view error logs from all Field Bridge systems in the Web-based. You must have system administrative access to view error logs.

1. In the Web-based system, from the top right, click *Admin*.
   The *Administration* page appears.
2. Under *Administration Reports,* click *Errors.*
   A sub-menu appears.
3. Under *Errors,* click *Field Bridge Exceptions.*
   A list appears, with each record containing a full submission of the error log from a Field Bridge.
4. To view a particular error log submission, for that record, click *Show List.*

7.5 Checking for Field Bridge Updates

If at any time you would like to check for additional Field Bridge updates that may be available, you can do so.

1. In the Field Bridge, from the left menu of the dashboard, click *Administrative Options.*
   The *Options* dialog box appears.
2. Select the *Other* tab.
   The *Other* tab appears.



3. Click *Check For Updates.*
   A dialog box appears, updating you on the status of any updates,
4. As necessary, close the dialog box or download the updates.

CHAPTER 8

GLOSSARY

Active

Active records or features are currently available for use in the system.

Active Protocol

An active protocol is an interactive list of activities that should be performed for a specific provider impression. They provide a checklist of activities, and allow certain items on the list to open related run form tools (e.g., power tools). You can create active protocols to work with your service's protocols for the provider impression. Active protocols are used with the Field Bridge and dynamic run form.

Activity Times

Activity times are the times associated with any patient care activity (e.g., vitals, procedures, medications).

Add

1) You can add something to the system by creating a new record (e.g., a run report, staff member, training course).

2) *Add* rights give you access to create new records in a specific section of the application.

Addendum

An addendum is an additional document that can be attached to a run form with more information. Addendums can be added to a run form at any time, even if the run form is locked.

Administrator

An administrator is a general term for a user with a high level of access to the system. Most administrators will be able to configure the system to some degree and may also have additional access to records within the system. Your organization may have several different levels of administrators who have different levels of access to the system.

Administrative Options

Administrative Options in the Field Bridge is a permissions-based link allowing access to administrative setup options including EKG setup and automatic completion options such as call numbers, saving and event tracking.

Agency ID

The Agency ID is a code used to identify each service that is set up on the Service Bridge, State Bridge or Rescue Bridge, which makes sure you connect to the correct service for syncing. It can be found in the *View Service information* section of the Web-based system.

Agency Transferred To/From

An agency transferred to/from or a transferring agency is a record containing the information for a single agency (e.g., nursing home, hospital) that a patient might be transferred to or from. These records can be selected from a drop down menu on the run form so that providers do not need to enter all the information for common agencies on every run form.

AMA Questions

AMA questions are additional questions that are displayed in the *Against Medical Advice* signature panel for patients, which allow you to collect more detailed information.

Ascending

Ascending order sorts records from the top down (e.g., 1–10, a–z).

Attachment

An attachment is a file that is associated with a particular email or record. Whenever someone opens the record or the email, they can then view or download the file.

Audit Tracking

Audit tracking relates to the options related to run form changes that are recorded in an audit log for security and data integrity purposes.

Auto Call Number

An auto call number is a number that is automatically generated by the system for each new run form, which uniquely identifies that run form for that particular call. The format of automatic call numbers will be set up by the administrator for the system.

Auto Narration

Auto narration is a feature that will complete the narrative on your run forms for you based on the information already in the run form and your answers to questions that it will ask once you choose to generate a narrative. These narratives can be generated to fit one of several different formats and allow you to make changes after information has been automatically generated.

Automatic Posting

Automatic posting is a feature that will prompt Field Bridge users to post their run forms at a specific time. This feature is controlled by the system administrator, who can determine whether the prompt appears, when it appears and what it says.

CAD integration

A CAD integration refers to special setup and development done by ImageTrend to allow your service to share information with an EKG monitor or computer aided dispatch program. In order to send or receive information from outside monitors or software, CAD integrations must be done to allow the systems to “talk” to each other.

Calendar icon

The *Calendar* icon is available for date fields. Clicking the icon will open a pop up calendar to allow you to locate and select the date.

Child

Some records and features can be created as a sub-entry under a larger feature or record (referred to as the parent).

CMS Billing Calculator

The CMS Billing Calculator automatically generates a suggested CMS billing rate.

Control

A control is a specific field that can be inserted into a dynamic run form template using the Layout Editor.

Controlled Substance

A controlled substance in the system is any medication that you define as a controlled substance. When controlled substances are defined, they will appear in the *Controlled Substances* signature panel on the EMS run form.

Dashboard

The Dashboard is the first page that will appear once you log in to the Field Bridge. It will display links to common options such as adding a new incident, viewing past incidents or setting custom user settings.

Database
The database is the file containing all the information collected in the Field Bridge.

Deactivate
Deactivating a record is marking at as inactive, which will result in the record being saved in the system but not available for current use.

Default
A default is something that will be used automatically unless a different value is selected. For example, a default value in a run form will be filled in automatically in each run form, although the user can manually change that value.

Default template
The default template is the run form that will be automatically used each time a user wants to add a record, unless they manually select a different template.

Descending
Descending order sorts records from the bottom up (e.g., 10–1 or z–a).

Destination
A destination is primarily used for EMS runs, and indicates the location or facility that an EMS patient was transported to.

District
A district is a division within a zip code that you can choose to set up to get more targeted geographic information. Districts are also known as zones.

Dock
Docking the right panel, also known as pinning it, will keep it displayed on the right side and will resize the rest of the run form so it will not be hidden underneath the right panel.

Download
Downloading information brings selected information onto your system using an Internet or wired connection.

Drop down menu
A drop down menu is a field that allows you to pick one choice from several choices that will be displayed. To view the choices, click the arrow on the menu.

Dynamic Run Form (DRF)
The dynamic run form is a type of EMS run form template that provides additional features for quick data entry.

EMS run report
An EMS run report is the report you need to fill out for any EMS calls.

EMS Shift
If you choose to record the name of the EMS shift currently working on your run forms, an EMS shift record is the name of the shift as it can be recorded on the run form..

Error log
The error log is a list of all errors that your Field Bridge has generated. You can submit this list to your Service Bridge, State Bridge or Rescue Bridge if necessary, and it allows ImageTrend to view the exact errors you may have received in case you need support.

Event Tracking

Event tracking in Field Bridge is a setting that determines what run form events should be tracked for audit tracking and when users should be required to record their reason for performing a task (such as generating a report or saving an incident).

Event Visibility Rules

An event visibility rule is a setting that administrators can set up on dynamic run form templates that will show or hide specific portions of the run form based on the data that is entered into the run form. Event visibility rules are also referred to as visibility events. **EXAMPLE:** An event visibility rule can be set up to hide the information in the Cardiac Arrest panel if the provider records that this is not a cardiac call.

Favorite Destination

A favorite destination is a record for destinations that you bring patients to frequently; these destination will appear at the top of the list for easy selection.

Favorite Location

A favorite location is a record for frequently visited cities that will allow you to select the city, county, state and postal code for that location with a single selection.

Field

A field is a space for a piece of information. Fields are often used for collecting information, but also refer to a particular piece of information. Most fields are associated with a question to let you know what information to enter.

Field Bridge

The Field Bridge is a field data collection program for EMS run reports which can be connected to the system to gather data in the field without an Internet connection.

First EMS Unit Arriving

This option can record the first EMS unit that arrives on the scene of any incident on EMS run forms.

First Responder Agency

First responder agency records allow you to document any first responding agencies on the scene for EMS run forms.

Form

A form is a collection of questions and fields to gather information.

ImageTrend

ImageTrend is the company that provides and supports Field Bridge.

Inactive

Inactive records are not available for use in the system, although they are saved in the system for reference.

Inbox

The inbox is a section within the Service Bridge, State Bridge or Rescue Bridge system that allows you to send and receive messages, much the same as email.

Incident Clearing

Incident clearing is an option that can be used if you are setting up Field Bridge systems. It allows administrators to set the Field Bridge system up to automatically delete incidents that have been posted after a certain number of days.

Incident Report

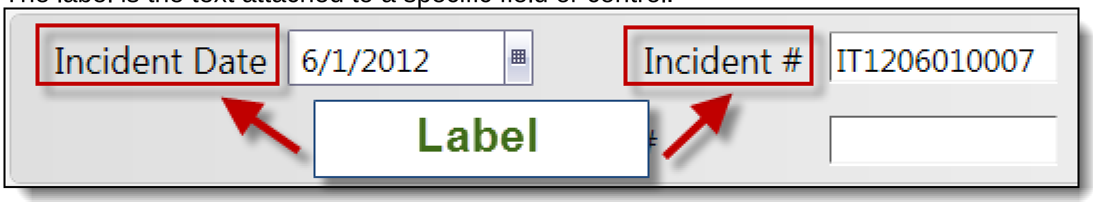
An incident report is the paperwork you need to fill out to report on any incident you are involved with. Incident reports are also referred to as run forms and run reports.

Interactive Physical Assessment

The interactive physical assessment is a graphical, Flash-based tool that allows you to record medical, injury and burn assessments on the image of a person.

Label

The label is the text attached to a specific field or control.



Layout Editor

The Layout Editor is the tool that can be used to create and edit EMS dynamic run forms, as well as to set up provider actions and give access to specific dynamic run forms.

Level

The level of a provider is based on their training level, which should be stored with the staff member's profile.

Locked

Locked run forms cannot be edited.

Login

1) Your login information is your username and password, which are used to access the system.
2) To log in to the system is to enter your credentials (username and password) so you can access the system.

Logout

Logging out of the system is closing the system so that no unauthorized user will have access to the information within the system.

Lookup icon

The *Lookup* button brings up a scrollable list of the possible options, preventing you from needing to remember information such as codes.

Modal window

A modal window is a pop up window within the application that causes the page you were working on to be "greyed out" in the background while you fill in specific information.

Now button

The *Now* button will automatically enter the current time into the corresponding field.

Number Pad icon

The *Number Pad* button opens a powertool displaying large number buttons that are easy to select with the stylus or your finger. Numbers touched on this pad will be added to the corresponding field when you click *OK.*

Order

The order of a record is its position within the list of records for that section (e.g., first, second). Order should always be recorded as a number.

Other EMS Agencies at Scene

The *Other EMS Agencies at Scene* option allows you to create and record the names of any other EMS agency that may respond to and assist at a scene.

Other Responding Units

The *Other Responding Units* option allows you to create and record the names of any other agencies or units that might respond to a scene, such as police departments, first responders or utility companies.

Panel

A panel within a run form is a section containing several fields, within a single tab. Panels will have a header with the name of the panel at the top of the section.

Password

A password is a short collection of letters and/or numbers that, in combination with your username, identifies you to the system. Your password should be kept secret.

Permission Group

Permission groups, also referred to as security groups, are groups that users can be assigned to that define their level of access to the system. Permission groups control access to each major section of the system.

Permissions

Permissions are controls on how much access to the system a particular group has.

Populate

Populating a field is automatically filling information in according to data that is elsewhere in the system or the run form.

Post

Posting is sending the data from your run forms to the Service Bridge, State Bridge or Rescue Bridge that your Field Bridge is connected to. You must post in order for your service to be able to access your runs or submit them to the state.

Posting Preferences

Posting preferences refers to the setup information connecting you to your service's Service Bridge, State Bridge or Rescue Bridge. Without posting preferences set up, you will be unable to connect to the Web-based system to download any information or to submit your run reports.

Power tool

A power tool is a pop up page that allows you to quickly enter common information regarding a patient, such as vitals or IV information. Power tools provide larger buttons and fields with common information more easily accessible, allowing you to quickly enter information that can then be saved in the run form. When finished with a power tool, you are redirected to the Activities grid.

Primary Role of Unit

The primary role of unit is a setting that will assign the role of a particular vehicle or unit to its most common role by default.

Provider Action

A provider action is a group of procedure and vitals fields that allow you to quickly document information for a specific situation or action.

Quick Launch Links

Quick launch links are used in the Field Bridge and provide a way to add links to the toolbar, allowing Field Bridge users to quickly navigate to a common program or website.

Rapid Entry Listbox

A rapid entry listbox is a type of field that appears on the dynamic run form that allows you to click within the field to bring up a list of options, type to narrow down the options for quick selection or open the *Lookup* window for a complete list of possible options.

Register

Registering your product is entering the registration number you are provided when you buy Field Bridge to activate it as a legitimate copy of the application.

Repeat Patient

A repeat patient is an EMS patient who is frequently involved with calls; a repeat patient record can keep track of some of that patient's information (e.g., address, medical history, etc.) so that it does not need to be entered for every call.

Rescue Bridge

The Rescue Bridge is a Web-based data collection and analysis system for fire and EMS data.

Role

A staff member's role refers to the role he plays on a call.

Run

A run is any call or incident you go on, or the report you fill out for that incident.

Run form

A run form is the report you will fill out for each call. This is also known as a run report, incident report or run.

Run form field default

A run form field default is the value that is automatically entered into a field on a run form. This can be set up for templates that will be used in the Field Bridge or any dynamic run form.

Run form template

A run form template is one particular layout for the run report's form. Using templates allows you to work with forms that are tailored to your service or the type of call. For instance, there may be a cardiac arrest call template that gives you the forms for cardiac arrest calls, while the standard form does not include that information.

Run report

A run report is the paperwork that you fill out for reporting your incidents. A run report is also referred to as an incident report, run form and run.

Security Question

A security question is a question that will be asked when a user logs in to verify their identify, as an extra security measure.

Service

1) In this manual, service is a general term used to refer to a specific agency or organization that provides EMS or fire services.

2) A service as defined in the system is a specific entity (generally any agency or department) that reports fire and/or EMS runs in your system. A specific service will be able to control settings for its own reporting and data analysis.

Service Bridge

The Service Bridge is ImageTrend's Web-based EMS data collection system dedicated to helping services manage their data. The Service Bridge collects and analyzes run report data and allows your service to work with the information and, if needed, submit it.

Service Defined Question

A service defined question is a custom question that can be added to an EMS run form to collect additional information that may not be collected in the existing run forms.

Service URL

The service URL for posting preference is the Web address you use to access your Web-based system (e.g., Service Bridge, State Bridge or Rescue Bridge).

Session timeout

The session timeout is the amount of time that can pass when a user does not do anything on the system before that user is logged out of the system. Session timeout is a security feature, making it less likely that someone can access the data on the system if a staff member forgets to log out.

Signature Consent Text

Signature consent text is the short amount of text explaining what is being agreed to before requesting a signature.

Signature Validation

Signature validation is a feature that allows administrators to set up which signatures will be required for run forms collected with the Field Bridge.

Silverlight

Silverlight is a free plugin available from Microsoft, which is required to view any dynamic run forms.

Staff Profile

A staff profile is a record for an individual staff member at your school. Staff profiles contain demographic and certification information, as well as the permissions settings that control that person's ability to log in to the system and access data. Staff profiles can also contain additional details, including emergency contact information, equipment allocations or lists of completed training courses.

Standard Run Form

The standard run form is the traditional EMS run form, which does not require any additional plugins to use.

State Bridge

The State Bridge is ImageTrend's Web-based EMS data collection system dedicated to helping states manage data for all the services within the state. The State Bridge collects and analyzes run report data and allows your service to work with the information and submit it to the state.

Status

A status is the condition of a particular record (e.g., active or inactive for users, in progress or submitted for run forms).

Sync
Syncing, is the process of passing all information set up on the Web-based system to all Field Bridge systems that are connected with the Service Bridge, State Bridge or Rescue Bridge. This ensures that all data is up to date in the field systems.

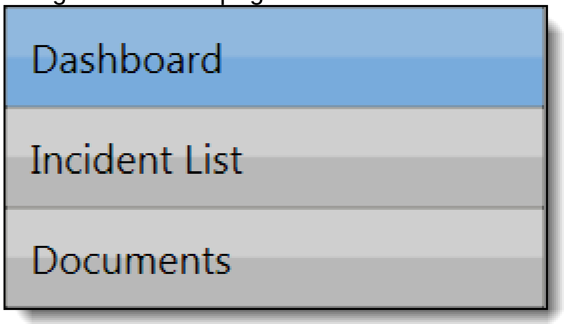
Sync Log
The Sync Log is a list of each time a specific Field Bridge has synced to the Service Bridge/State Bridge/Rescue Bridge.

Synchronize
See Sync.

System Administrator
The system administrator is the individual in charge of setting up and maintaining the entire system.

Tab
A tab in a run form is an individual page containing related fields.

Task Pane
The Task Pane is the set of links from the main Field Bridge window that can be used to navigate between pages.



Template
A template is a pattern that can be used to create individual records; for instance, a run form template can be used to create multiple run forms.

Timeout
The timeout is the amount of time that can pass when a user does not do anything on the system before that user is logged out of the system. Session timeout is a security feature, making it less likely that someone can access the data on the system if a staff member forgets to log out.

Toolbar
A toolbar is a horizontal bar containing multiple links or buttons that can help you navigate through the system or complete certain tasks.

Transferring Agency
A transferring agency is an organization or agency that is transferring EMS patients either to or from their facility.

Unlocked
An unlocked run is editable.

Upload
Uploading bringing a file into the system.

User
A user is a person who can log in to and use the system. In contrast to an administrator, a user can only use the features of the system and not set up the system.

User Settings
User settings are Field Bridge settings that will determine how the field Bridge run form will appear and perform based on the user who is currently logged in.

Username
A username is the name the system uses to identify you when you try to log in to the system.

Validate
Validating a run is checking for any required fields that have not been completed in a run form.

Validity
Validity is the percentage that the run form is complete, based on the rules set up for required information.

Validity Compliance Documentation
Validity compliance documentation is a feature that can be set up for the Field Bridge, allowing administrators to prompt users for reasons why required fields have not been completed.

Validity Reason
A validity reason is an explanation of why a required field has not been completed in a run form.

Validity Rule
A validity rule is a setting created by the system administrator, which determines when a field is required and how many point should be deducted from the validity score if the field is not completed.

Validity Score
A validity score is a numerical score used to indicate the level of completeness of an incident form. This score is generated based on the setup of your system, where an administrator determines which fields need to be filled out and assigns a number of points to be deducted if those fields are left blank. The lower the validation score, the less complete the incident form is. Providers should almost always aim for a validation score of 100, which indicates that all required fields are completed. However, a validation score of 100 does not indicate that the run form is filled out correctly; validation scores cannot ensure that the correct address is entered or that the patient's name is spelled correctly, just that an address or last name was filled in.

Value
As used in this manual, a value is any text, number or selection that should be entered into a field.

Visibility Event
A visibility event is a setting that administrators can set up on dynamic run form templates that will show or hide specific portions of the run form based on the data that is entered into the run form. Visibility events are also referred to as event visibility rules.

EXAMPLE: A visibility event can be set up to hide the information in the Cardiac Arrest panel if the provider records that this is not a cardiac call.

Web-based system

Web-based systems are applications that must be accessed over the Internet. In this manual, the most common Web-based systems that will be referenced are Rescue Bridge, Service Bridge and State Bridge. These are the systems that the Field Bridge may be connected with.

Widget

A widget is an on-screen tool that can be displayed on the Dashboard to give you quick access to information. Each user can decide which widgets to display on their Dashboard.

Zone

A zone is a division within a zip code that you can choose to set up to get more targeted geographic information. Zones are also known as districts.

CHAPTER 9

HELP AND SUPPORT

Help and Support

Before Contacting ImageTrend

Please have the following information accessible when calling ImageTrend:

- A description of your computer system.
- The name of your operating system and service pack version (if applicable).
- A description of what happened and what you were doing when the problem occurred.
- The exact wording of any error messages you see.
- Your company name and contact information.

Contacting ImageTrend

If you are unable to find the information needed to use the EMS Field Bridge effectively, please consult ImageTrend in any of the following ways:

- Phone (952) 469.1589
- EDS Support Phone (888) 730-3255
- Toll-Free (888) 469.7789
- Fax (952) 985.5671
- Web http://support.imagetrend.com
- Email support@imagetrend.com

ImageTrend support services are available:

Monday – Friday
8:30 a.m. to 5:00 p.m. central time

Technical Support

For 24-hour technical support, ImageTrend provides online assistance through their website and email services:

- Web http://support.imagetrend.com
- Email support@imagetrend.com