STATE BRIDGE

VERSION 6.2

SERVICE ADMINISTRATOR GUIDE

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CHAPTER 1

INTRODUCTION TO THE EMS STATE BRIDGE

1.1 Chapter Overview

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

1.2 Overview of the State Bridge Application

The ImageTrend EMS State Bridge is a pre-hospital emergency data collection, analysis and reporting system. EMS State Bridge integrates information across the entire emergency medical community, whether in the ambulance, the local station, the county or state offices. With the EMS State Bridge, ambulance services are able to satisfy reporting requirements easily, without major investment and without learning complex new technology.

The system provides:

- Data collection based upon the NHTSA V2.2.1 data set.
- The aggregation of information from various units and the possibility of sharing this with other systems and agencies.
- Electronic transport of information to other systems and agencies to improve communications and to share pertinent information.
- Standard and ad hoc reporting to turn data into useful information.
- Easy expansion through its open architecture as needs grow and evolve.
- Scalability to conform to the needs of small, medium and large services as required.

Additionally, the system is HIPAA compliant and sensitive to medical data security issues. The application meets and exceeds state and federal data privacy requirements.

1.3 System Requirements

Web/Application Server Hardware

Recommended	**ImageTrend Hosted**
Dual Quad Core Processors	Dual Quad Core Processors
8-16 GB RAM	32 GB RAM
100 GB Available Hard Disk Space	SAN Data Storage
RAID 5 SCSI Hard Drives with OS and Data Partitions	Blade Servers with Microsoft Hyper-V

Operating Systems Supported

(not required if hosted by ImageTrend)
Microsoft Windows 2003 R2 Server
Microsoft Windows 2008 R2 Server (recommended)

Web Server Software

(not required if hosted by ImageTrend)
Microsoft IIS version 6.0, 7.5 or later

Additional Service Software

(not required if hosted by ImageTrend)
Microsoft .NET Framework 3.5 SP1
Microsoft .NET Framework 4.0

Microsoft Tablet PC SDK

Additional Application Software

(not required if hosted by ImageTrend)
Adobe ColdFusion 9 Enterprise

Database Server Hardware

A separate database server is required (unless hosted by ImageTrend)

Required	Recommended
2 GHz Processor	Dual Quad Core Processors
4 GB RAM	8–16 GB RAM
40 GB Available Hard Disk Space	80 GB Available Hard Disk Space
	RAID 5 SCSI Hard Drives

Database Software

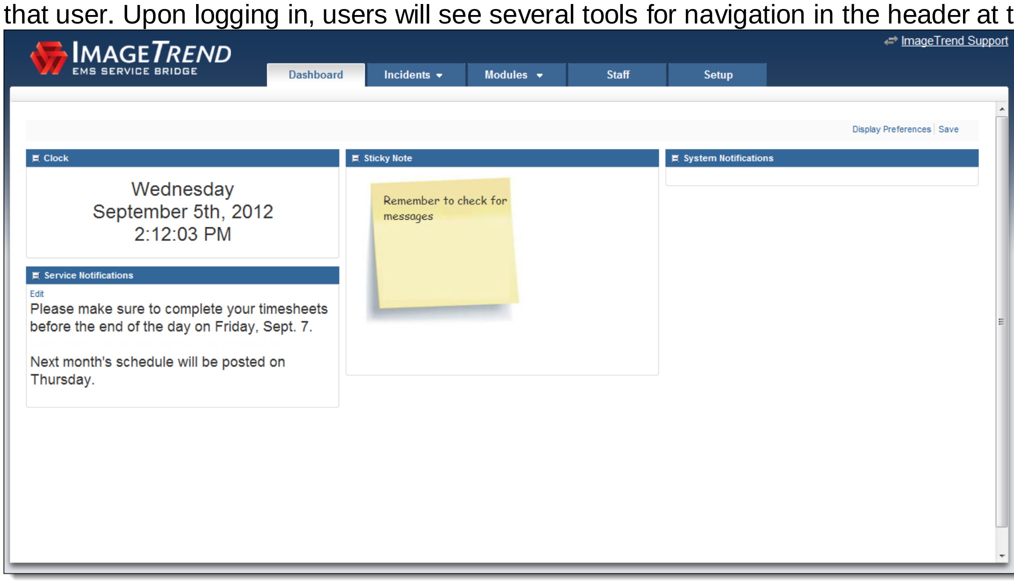
64-bit software is recommended.
Microsoft SQL Server 2005
Microsoft SQL Server 2008
Microsoft SQL Server 2008 R2 (recommended)

Internet Browser Requirements for End Users

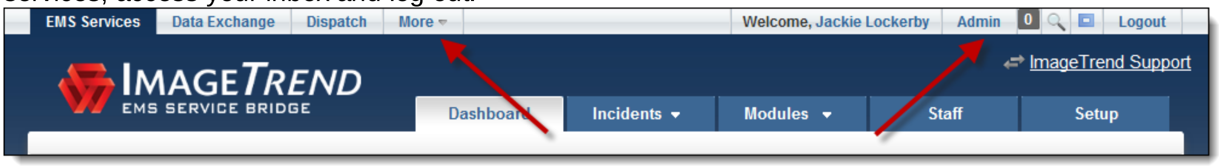
Microsoft Internet Explorer 7.0 and above
Other browsers that support Mozilla 4.0 and above
Adobe Flash 8 or higher (recommended)
Adobe Reader 8 or higher (recommended)
Silverlight 4

1.4 The State Bridge Environment

The State Bridge allows all users to enter data for run reports, as well as view a variety of information about the service, past run data to which the user has access and messages and alerts directed towards that user. Upon logging in, users will see several tools for navigation in the header at the top of the page.

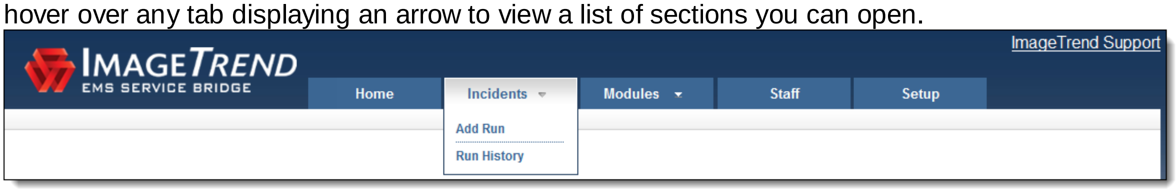


The links in the top left will bring you between modules and will display the same options no matter what the user is doing with the State Bridge. Additional links may be available depending on which modules you have access to. If you have access to many different modules, some of them may be included under the *More* link. Additional options in the top right allow you to edit your profile, search for run reports or services, access your inbox and log out.



- *My Service* or *EMS Services* provides access to service-specific functions to service administration, individual run (incident) reporting and standard reports.
  HINT: If multiple services are managed through this State Bridge, the tab may say *EMS Services.*
- *Data Exchange* allows administrators to import new information to the system from particular formats or export data gathered in the system to a supported format.
- *Report Writer 2.0* provides access to the new Report Writer for working with standard, search, ad hoc and multi-dimensional reporting.
- *Cert Dashboard* provides access to the Certification Dashboard, which is a module that can be used to track staff members' certifications, training courses and renewals.
- *User Voice* provides access to a forum where you can leave and vote for suggestions for the State Bridge, Field Bridge and associated modules.
- *Help* provides access to ImageTrend University, allowing you to view and download videos, quick guides and manuals to learn to best use your applications.
- The username in the top right opens the currently logged-in user's profile.
- The number icon in the top right opens your inbox. This number changes based on the number of unread inbox messages you have.
- The *Maximize/Minimize* icon in the top right allows you to toggle between collapsing the top area of the page (which contains the tabs) to show more of the page content or showing it again.
- The *Logout* link logs the user out of the application.

The tabs allow you to access pages and sections within the module you have selected from the links at the top of the page. These tabs will change depending on the module you are working within. You can hover over any tab displaying an arrow to view a list of sections you can open.



Many users will work primarily with the tabs available in the *My Service* (or *EMS Services*) section.

- *Dashboard* brings you to a personalized home page for your service.
- *Incidents* opens a drop down menu that allows you to jump to the page to add a new incident or search run history.
- *Modules* opens a drop down menu that allows you to open any of the sections available for your service, such as the *Documents, No Runs to Report* or *Training* modules. The modules available here may differ from those shown in this manual based on the modules that your service uses.
- *Staff* brings you to the *Staff* page for this service, with a list of all staff members.
- *Setup* brings you to the setup options for your service on the system.

To return to the home page for this service at any time, from the top toolbar, click *My Service*.

System administrators can create alerts to be sent to users' inboxes or displayed on the home page of the application. Alerts set to display on the application home page will appear in a banner across the top of the screen. Clicking this banner will take the user to a page with more information, if the administrator entered additional information.

The logged-in user's name will appear in the upper right corner of the screen. If this link is clicked, the user's profile will open for editing. Use the provided fields to enter or change information, and the tabs at the top of the screen to navigate through the profile.

1.5 Record Keeping

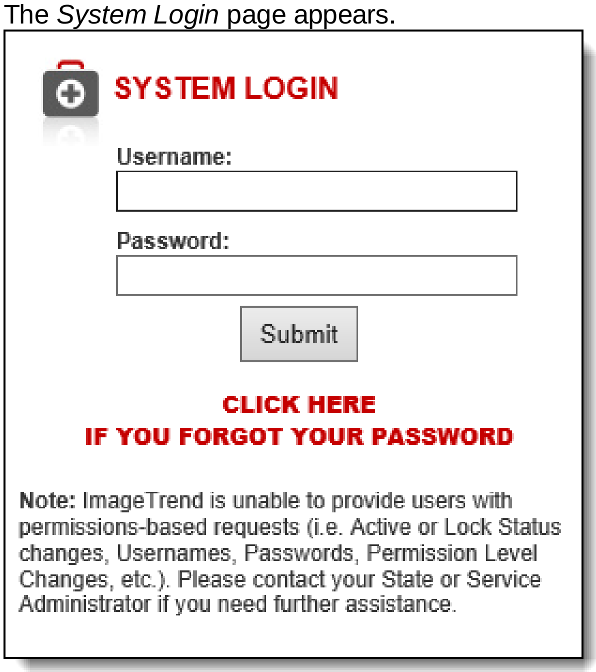
The State Bridge system allows administrators to delete most information that has been added to the system. However, deleting information is strongly discouraged except in the case of test or training information, as deleted profiles or records can result in finished records becoming incomplete. Once a record or profile is deleted from the system, all other records or reports containing information from the deleted profile will also lose the deleted information. For instance, if a staff member's profile is deleted, all run reports that the staff member has ever completed will no longer contain that staff member's information.

All profiles and records that may be used in documentation will allow administrators to make the record inactive, which allows administrators to keep the record from being used within the system but still keeps the information within the system and allows records to be complete. This option is recommended in place of deleting any records.

1.6 Login

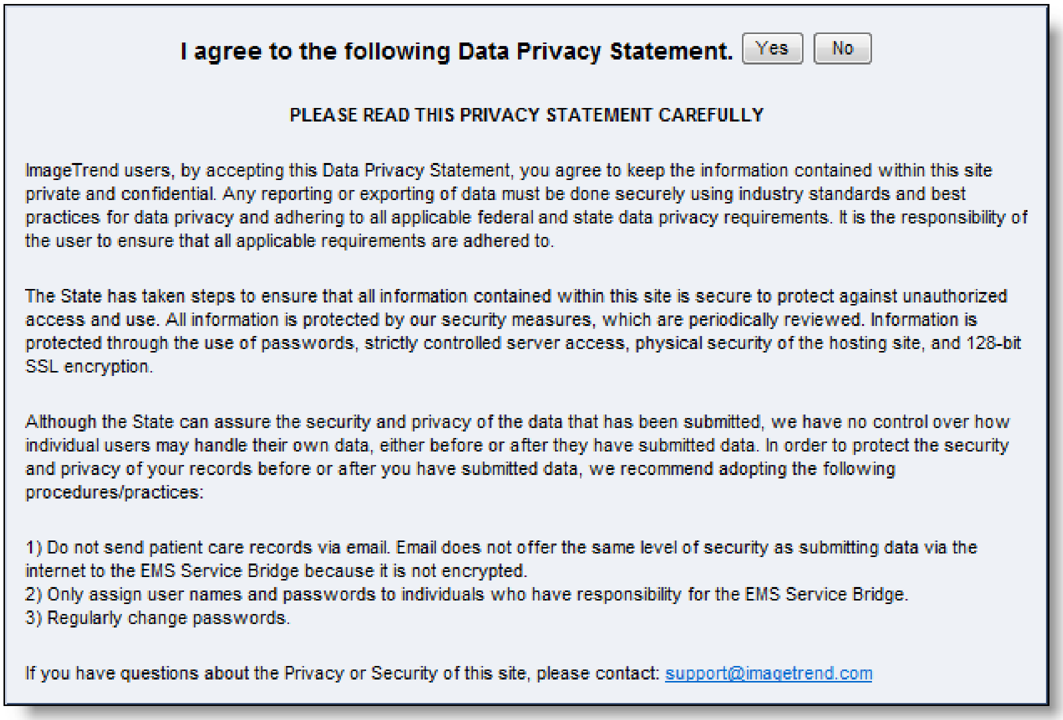
System users must log in to the State Bridge application online in order to use the system.

1. Using a Web browser, navigate to the URL for the service's State Bridge system.
   The *System Login* page appears.



2. In the *Username* field, type your username.
3. In the *Password* field, type your password.
   HINT: Initially, you should be provided with a password, which may come from the state, your service administrator or ImageTrend. After you have logged in once, the system will require you to change your password.

4. Below the *Username* and *Password* fields, click *Submit.*
   The data privacy statement appears.

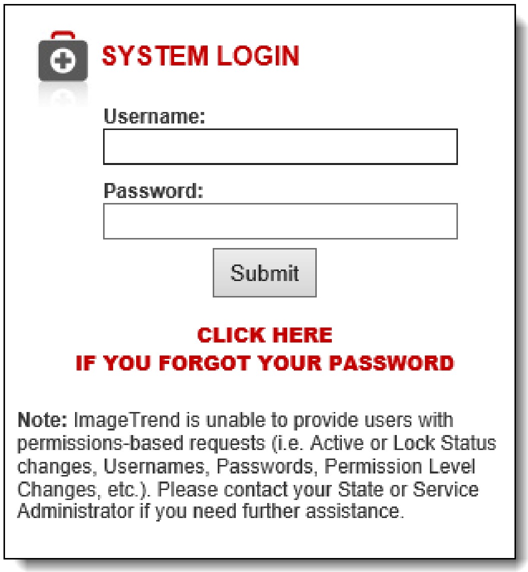


5. Read the data privacy statement.
   HINT: Agreeing to the terms automatically creates a user history and audit trail of site access to comply with HIPAA requirements.
6. If you agree, to log in to the system, click *Yes.*
   You are logged and the home page of the State Bridge system for your service is displayed.

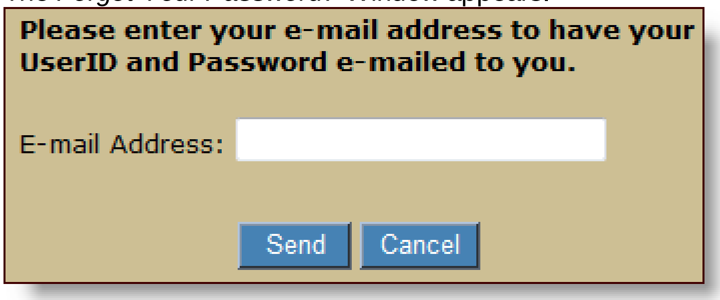
Forgetting Your Password or Username

If you forget your login information, the system can email you your username and password as long as your profile has been set up with a current email address. If you do not have a current email address included in your user profile, you will need to contact your state administrator to receive your login information.

1. In your Web browser, go to the URL provided for the State Bridge system.
   The *ImageTrend State Bridge* page appears.
2. In the middle of the page, in the *System Login* section, click the *CLICK HERE IF YOUR FORGOT YOUR PASSWORD* link.



The *Forget Your Password?* Window appears.



3. In the *E-Mail Address* text box, type the email address that is listed in your State Bridge profile.
4. Click *Send.*
   The system will send your login information to the email address you entered.

Security Questions

If the security question option is enabled, users will need to complete a security question before being able to access the State Bridge. These questions will be answered the first time the user logs in to the application and those answers will be required for any further logins in the future.

1.7 Selecting an Agency

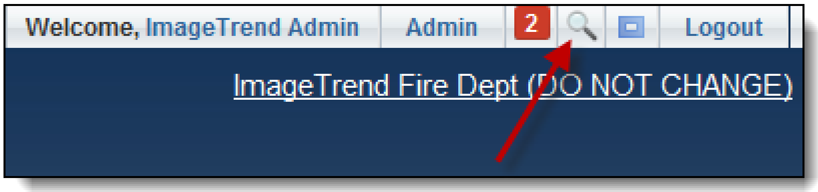
When you initially log in, you will be brought to the home page for your default agency or (if you have no default agency) the last agency that you viewed. If you intend to view or work with information for a specific agency, you will need to select the correct agency. You can do this by searching using the agency name or browsing through the list of agencies you have access to.

If you do not work with multiple agencies, these instructions may not pertain to you. If you only work with a single agency, that agency's information will open automatically.

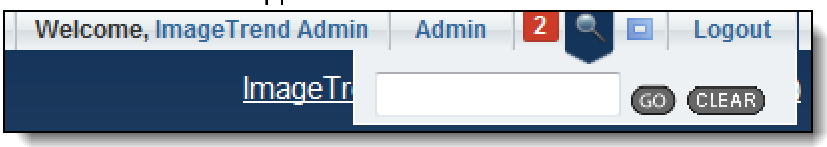
Searching for an Agency

You can search for the agency that you want to open if you know its name in the system.

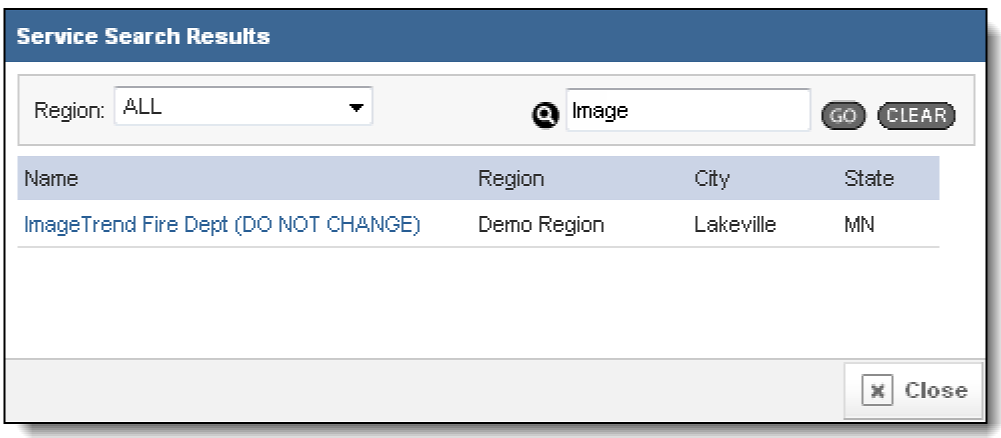
1. From the upper right, click the *Search* icon.



   The *Search* text box appears.



   HINT: Depending on your permissions, you may have the option to search either incidents or services from this box. If necessary, select *Service.*
2. Type the name of the agency (or part of the name) in the text box.
3. Click *Go.*
   The *Service Search Results* window appears, with a list of all services matching your search terms.

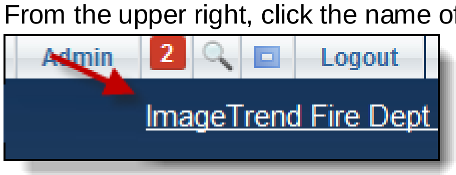


4. Click the name of the service.
   The *Dashboard* tab for that service appears.

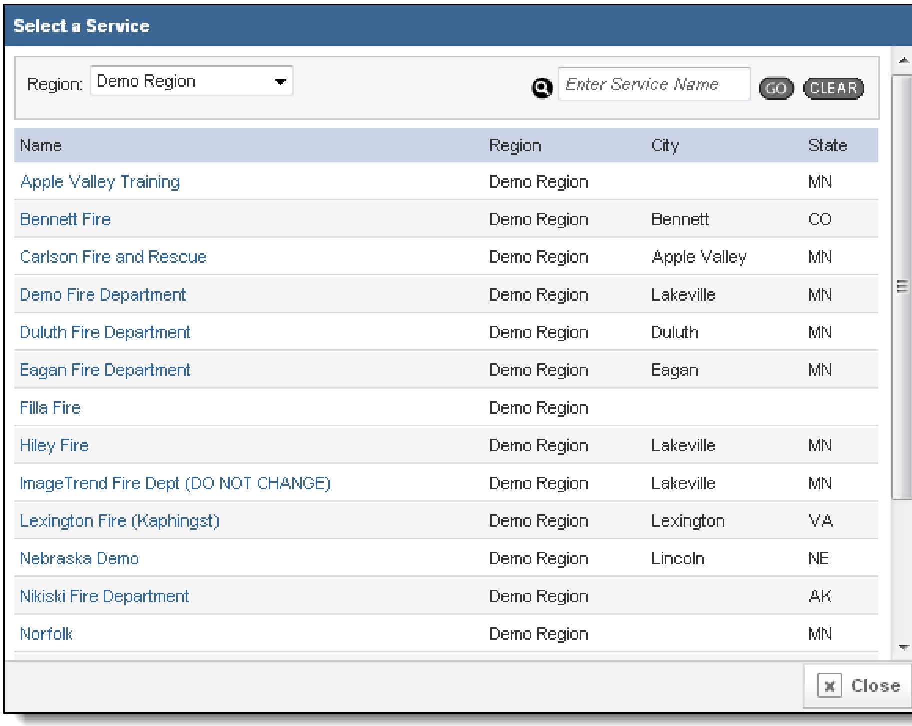
Browsing for an Agency

You can look through a list of agencies that you have access to, which will be sorted by region.

1. From the upper right, click the name of the currently displayed service.



The *Select a Service* window appears.

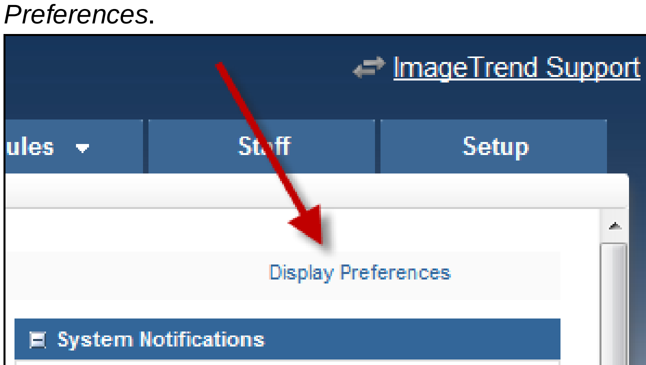


2. As needed, from the *Region* drop down menu in the upper left, select the region containing the agency you want to view.
3. Click the name of the service.
   The *Dashboard* tab for that service is displayed.

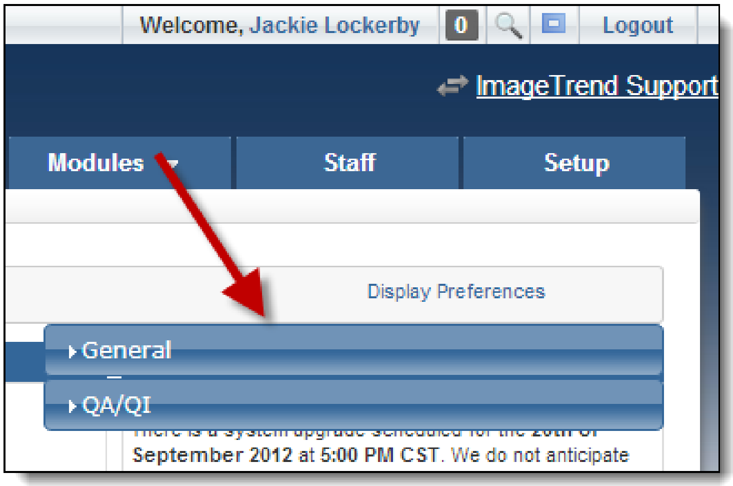
1.8 Personalizing the Dashboard

The Dashboard is a page that offers a collection of widgets that you can arrange to see information that is important to you at a glance. You can select which widgets you want to see and move them on the Dashboard, and those settings will be displayed for you each time you log in.

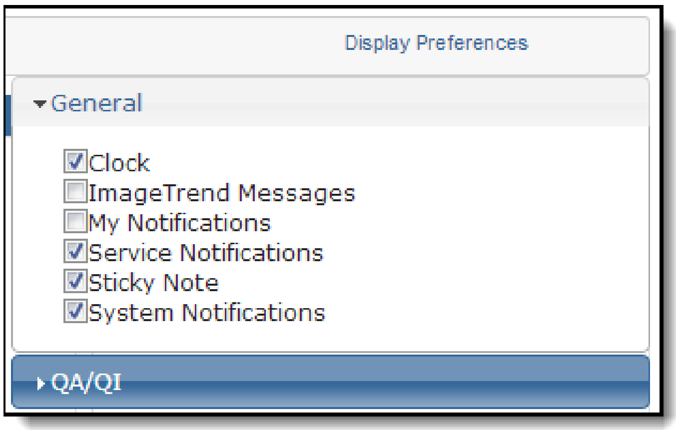
1. If needed, click the *Dashboard* tab.
2. To view a list of all widgets that can be displayed, from the *My Dashboard* bar, click *Display Preferences*.



A list of available types of widgets appears.

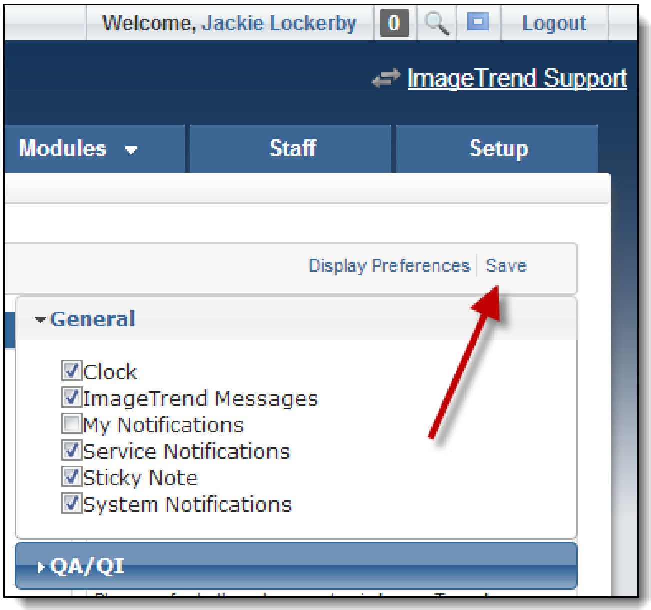


3. Click the type of widget you want to add.
   A list of available widgets appears.



4. From the list that appears, to display one of the widgets on the page, select the corresponding checkbox.
5. To hide a widget that is currently displayed on the page, deselect the corresponding checkbox.
6. When finished, to hide the list, click *Display Preferences* again.

7. To save your chances so that the Dashboard appears like this the next time you log in, click *Save.*

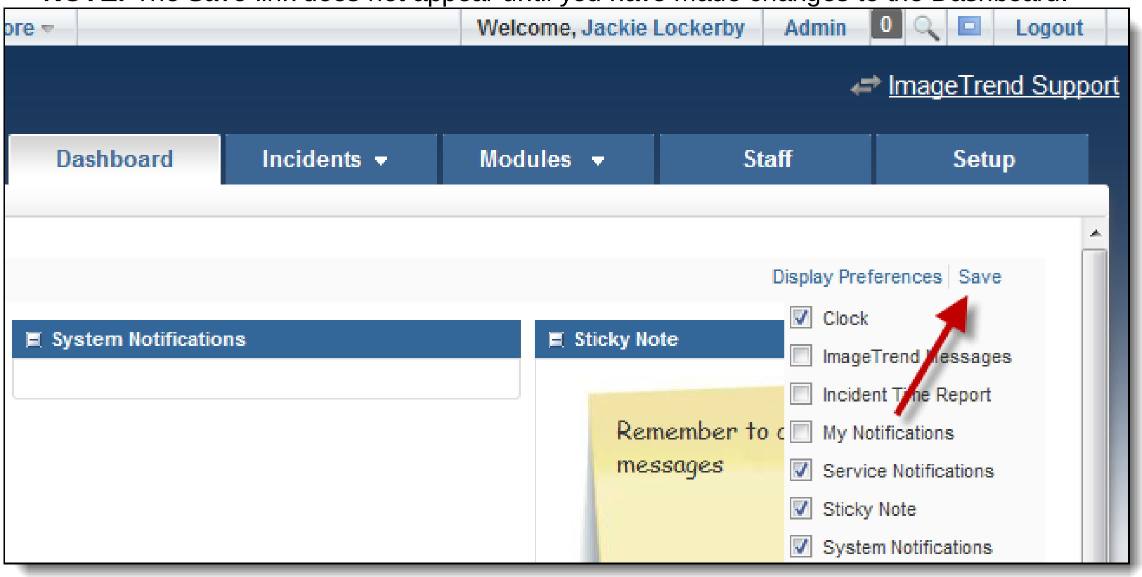


8. To move elements, hover the mouse directly above the widget's title until it becomes a four-sided arrow.

9. Click and drag the element to its new place on the page; all other elements will automatically move to accommodate the new layout.

10. When finished adding/hiding or moving widgets, click *Save.*

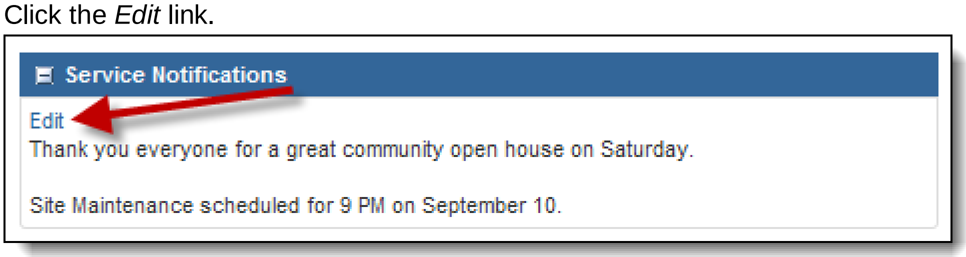
NOTE: The *Save* link does not appear until you have made changes to the Dashboard.



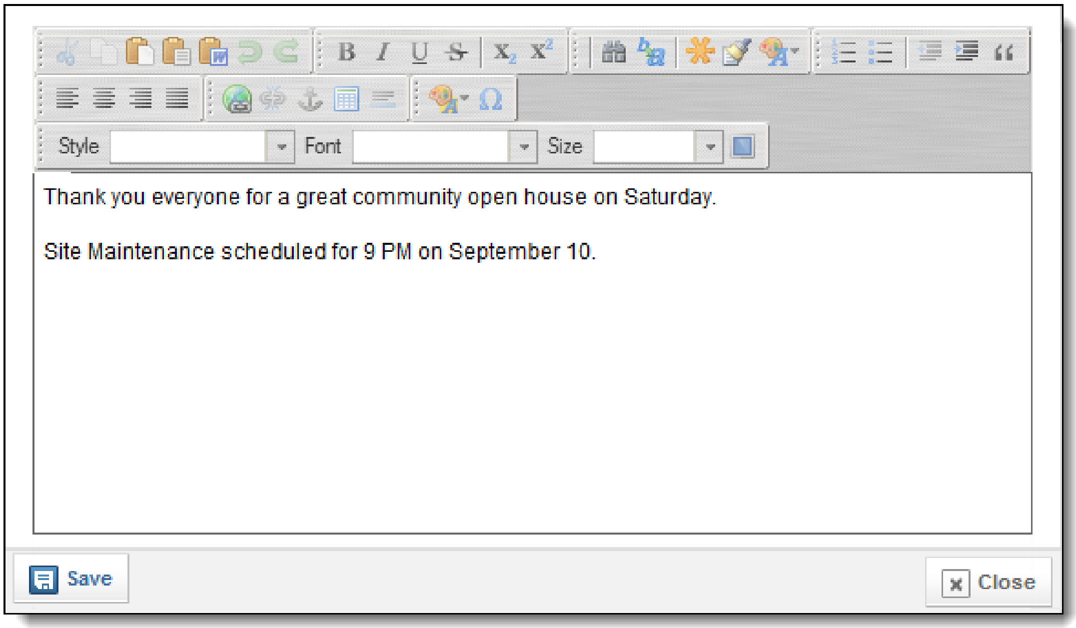
Posting a Service-Wide Message for the Dashboard

Every Dashboard will have widgets available that each State Bridge user can arrange and display according to their personal preferences. One of these is the Service Notifications widget. For State Bridge users who have service administrator-level permissions, this widget will display a link that allows you to create a message that will be displayed in this widget for everyone in your service. This message will not be displayed to individuals who have chosen to hide the Service Notifications widget.

1. Open your Dashboard.
2. Locate the *Service Notifications* widget.
3. Click the *Edit* link.



A pop up window appears with a WYSIWYG editor.



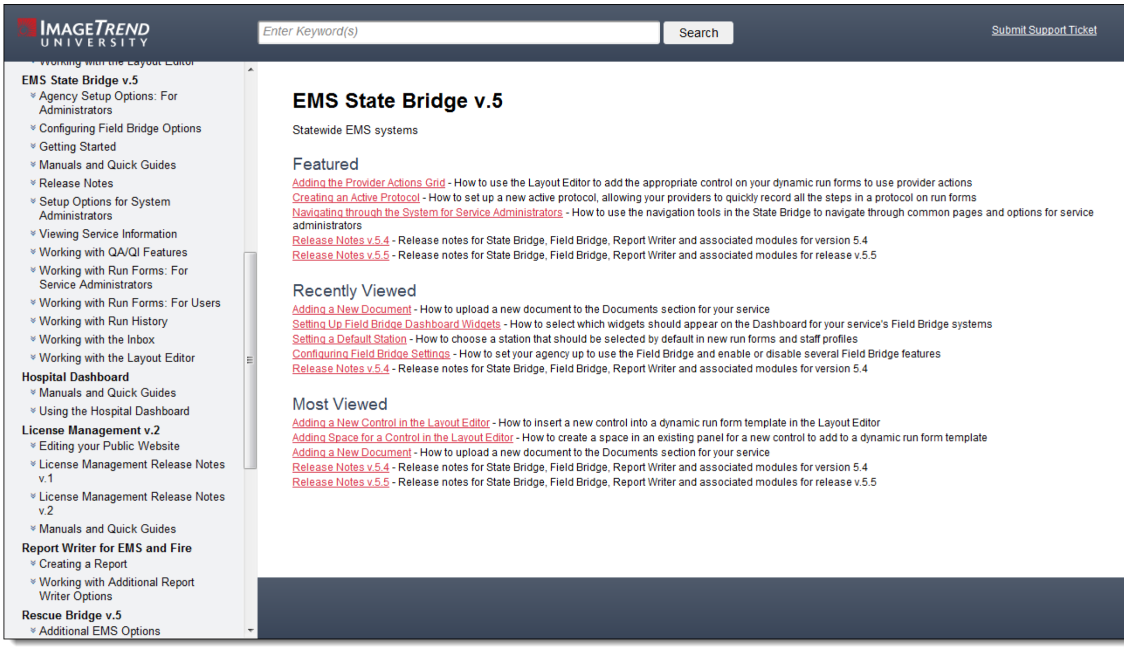
4. Enter the notification information into the text box.
   NOTE: Users will see the notification as it is displayed in this text box, including formatting. If you delete information that is included in this text box from previous notifications, it will no longer be displayed.
5. When finished, click *Save.*
   The notification information is updated and will be displayed on the Service Notifications widget for everyone in your service.

1.9 Accessing Help

Various videos, manuals and help articles are available to you through ImageTrend University. You can open ImageTrend University at any time from your State Bridge to find help content. ImageTrend University will also display help for all associated products and modules (e.g., the Report Writer, EMS Field Bridge or Hospital Dashboard).

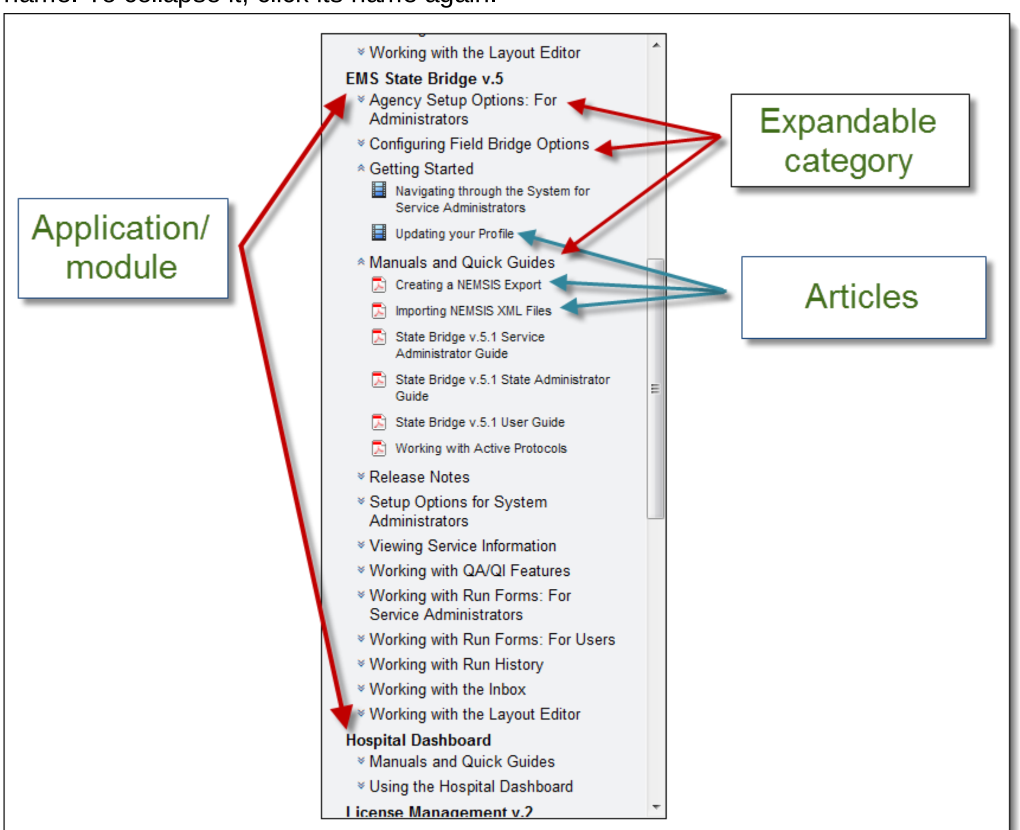
1. From the top left, click *Help.*
   ImageTrend University appears in a new window or tab.
   HINT: Depending on the number of modules you have access to, you may have to click the *More* link to see the *Help* link.
   NOTE: Depending on the page you clicked the *Help* link from, you may see the home page for the application you were working with, or an article related to the page you were viewing may

open directly in the viewing window.

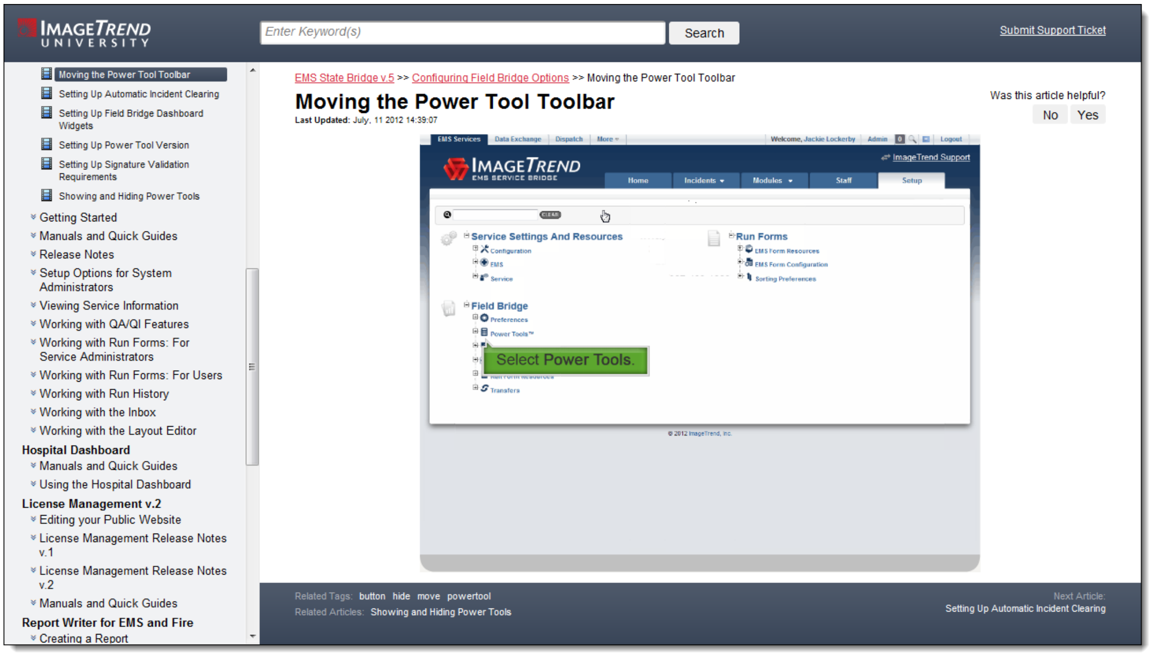


2. To view an article listed in the viewing pane, click the name of the article.
3. To browse through the articles available, use the left menu to expand the desired product and category until you locate an article to view.

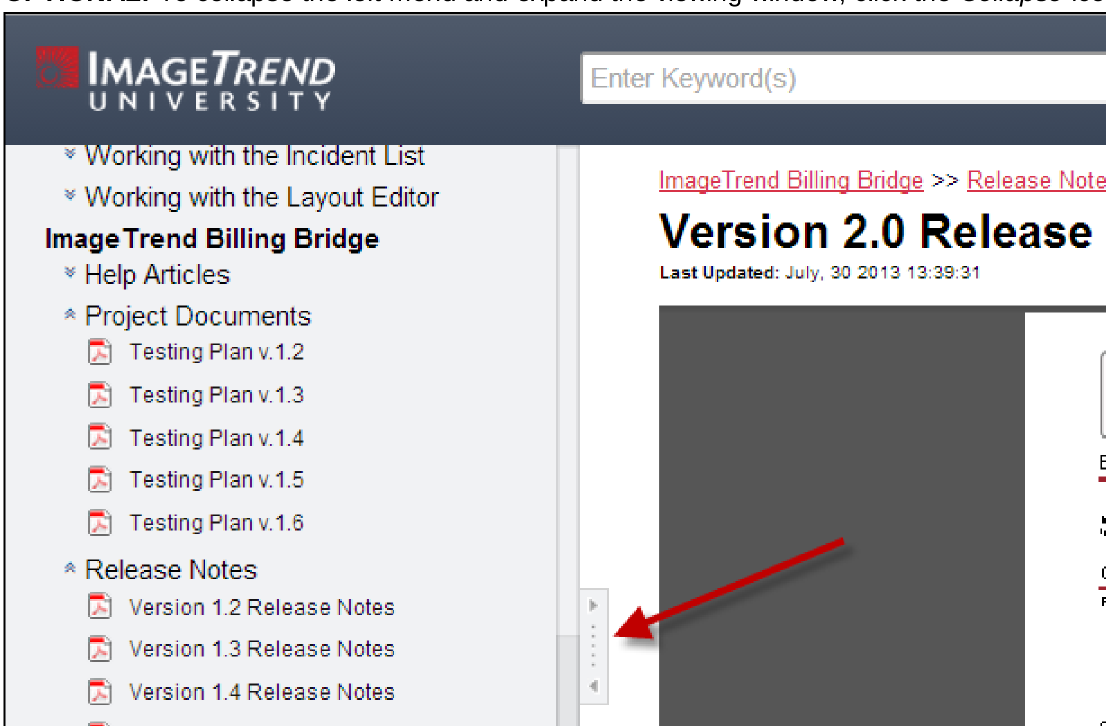
HINT: You can expand any category that you so not see articles underneath by clicking its name. To collapse it, click its name again.



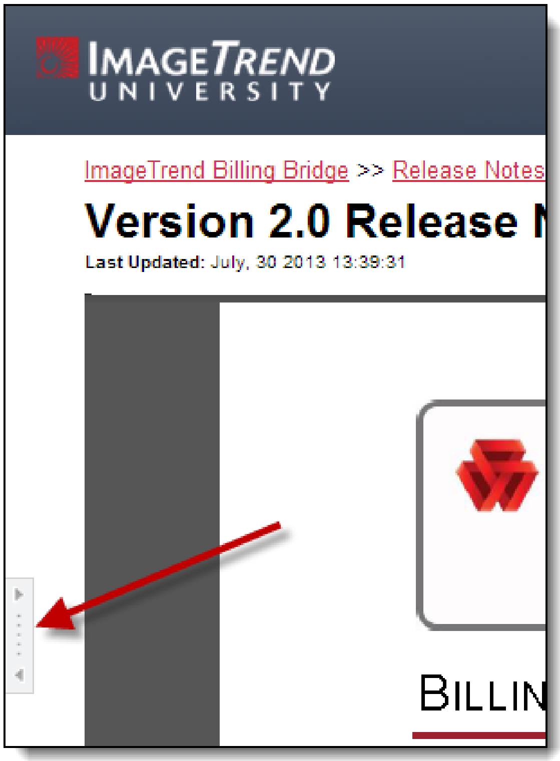
4. To view a specific article, click its name.
   The article appears in the main viewing window.



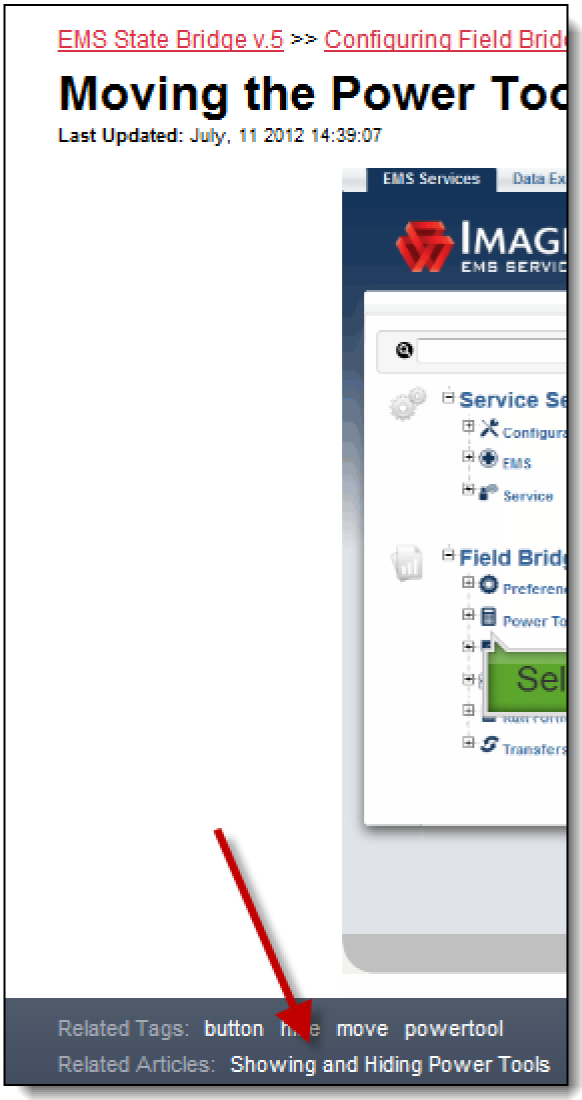
5. **OPTIONAL:** To collapse the left menu and expand the viewing window, click the *Collapse* icon.



6. At any time to expand the left menu if it is hidden, click the *Expand* icon.

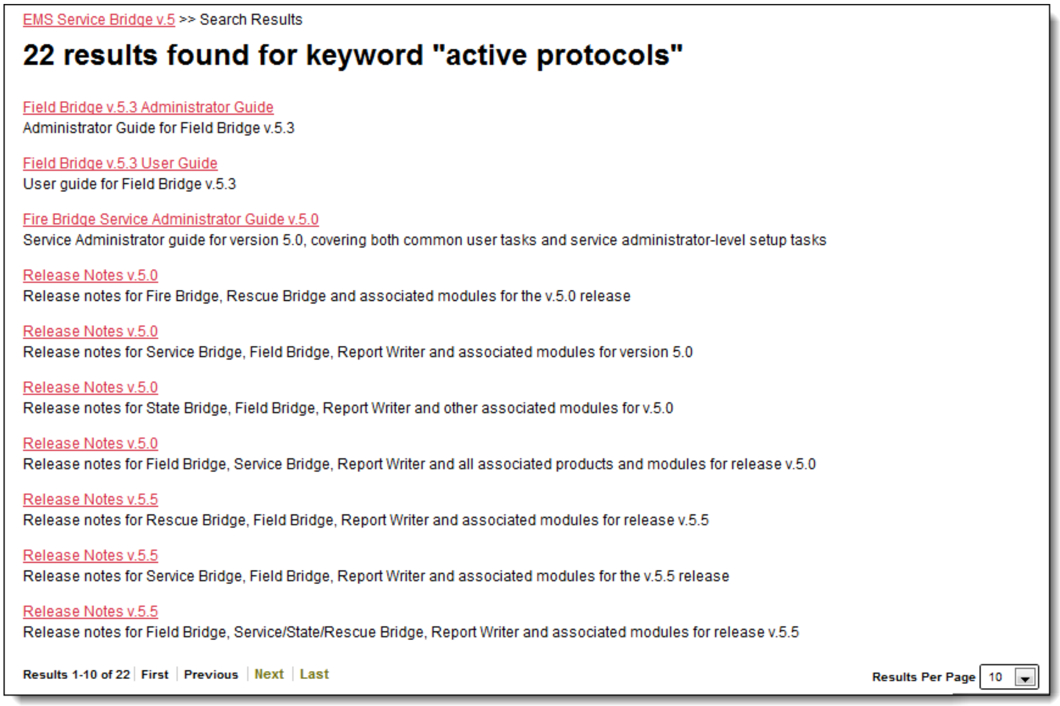


7. To jump to a related article, click the name of the article.
   NOTE: Not all articles will have related articles listed.



8. To search for an article by name or keyword,
   a. Type the search terms in the *Enter keyword(s)* text box at the top of the page.
   b. To narrow down the search results to a specific product or type of media, select the appropriate values from the drop down menus.

c. Click *Search.*
A list of articles containing your search terms appears.



EMS Service Bridge v.5 >> Search Results

22 results found for keyword "active protocols"

Field Bridge v.5.3 Administrator Guide
Administrator Guide for Field Bridge v.5.3

Field Bridge v.5.3 User Guide
User guide for Field Bridge v.5.3

Fire Bridge Service Administrator Guide v.5.0
Service Administrator guide for version 5.0, covering both common user tasks and service administrator-level setup tasks

Release Notes v.5.0
Release notes for Fire Bridge, Rescue Bridge and associated modules for the v.5.0 release

Release Notes v.5.0
Release notes for Service Bridge, Field Bridge, Report Writer and associated modules for version 5.0

Release Notes v.5.0
Release notes for State Bridge, Field Bridge, Report Writer and other associated modules for v.5.0

Release Notes v.5.0
Release notes for Field Bridge, Service Bridge, Report Writer and all associated products and modules for release v.5.0

Release Notes v.5.5
Release notes for Rescue Bridge, Field Bridge, Report Writer and associated modules for release v.5.5

Release Notes v.5.5
Release notes for Service Bridge, Field Bridge, Report Writer and associated modules for the v.5.5 release

Release Notes v.5.5
Release notes for Field Bridge, Service/State/Rescue Bridge, Report Writer and associated modules for release v.5.5

Results 1-10 of 22 | First | Previous | Next | Last   Results Per Page 10

d. To move between pages of search results, click the *Next* and *Previous* links at the bottom of the viewing pane.
e. When you see an article you want to look at, click the name of the article.

CHAPTER 2

SERVICE INFORMATION AND SETUP

2.1 Chapter Overview

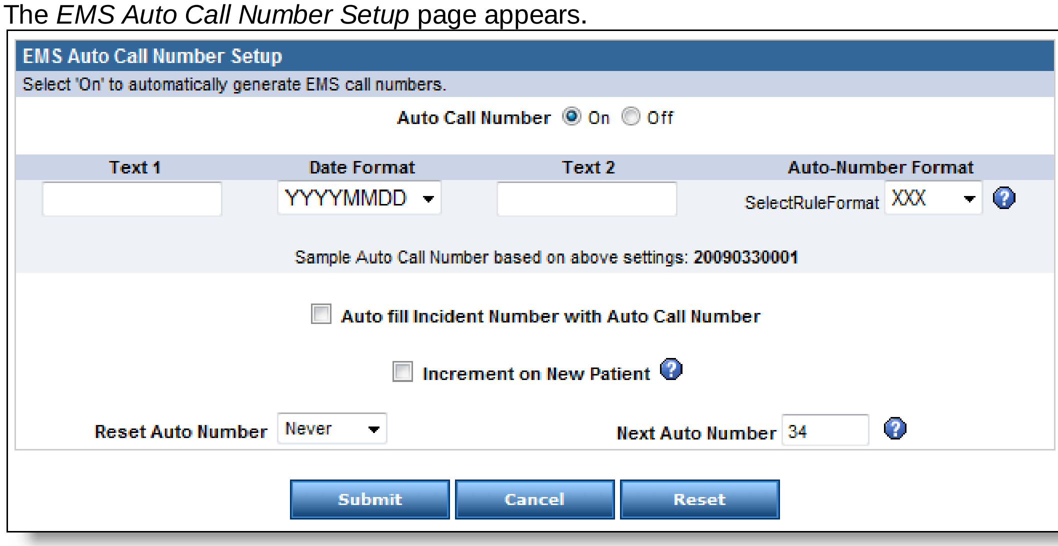
This chapter explains how administrators can access, change and add information about their service and its resources in the State Bridge. Setting up the service information can make data collection much easier, and can provide an easy reference for users who need to access data about the service.

2.2 Setting Up Automatic Call Numbers

You can set up a format for automatic call numbers, which will be added to each run form to ensure that no run form has the same number. Your format for auto call numbers should be different from any other system submitting to the same database (e.g., if you are submitting to a state system).

Auto call numbers that are set up here will control any run forms added to the State Bridge. You can set up formats for call numbers for the Field Bridge system on each Field Bridge.

1. From the top left, click *My Service.*
2. Select the *Setup* tab.
3. Under the *Service Settings and Resources* section, select *Configuration.*
   A sub-menu appears.
4. Under *Configuration,* select *Auto-Call Number.*
   The *EMS Auto Call Number Setup* page appears.

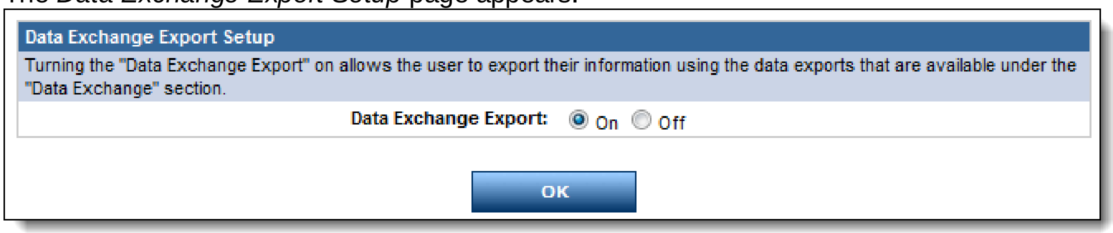


5. In the *Text 1* box, type any text to appear at the beginning of the call number.
6. From the *Date Format* drop down menu, select the format for the date information that will be included in the call number.
7. In the *Text 2* text box, type any text that will appear in the middle of the call number.
8. 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.
9. To automatically enter an incident number the same as the automatic call number, select the *Auto fill Incident Number with Auto Call Number* checkbox.
10. To generate a new call number when a new patient is added to an existing incident, select the *Increment on New Patient* checkbox.
11. 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.
12. To manually set the next number that will be automatically generated, in the *Next Auto Number* text box, type the next number.
13. To save the changes, click *Submit.*

2.3 Enabling and Disabling Exports

If your service exports information (e.g., to billing software), you may need to enable exports. This setting allows you to determine whether your service's information can be exported from the *Data Exchange* section of the State Bridge.

1. From the top left, click *My Service.*
2. Select the *Setup* tab.
3. Under the *Service Settings and Resources* section, select *Configuration.*
   A sub-menu appears.
4. Under *Configuration,* select *Data Exchange Export*.
   The *Data Exchange Export Setup* page appears.



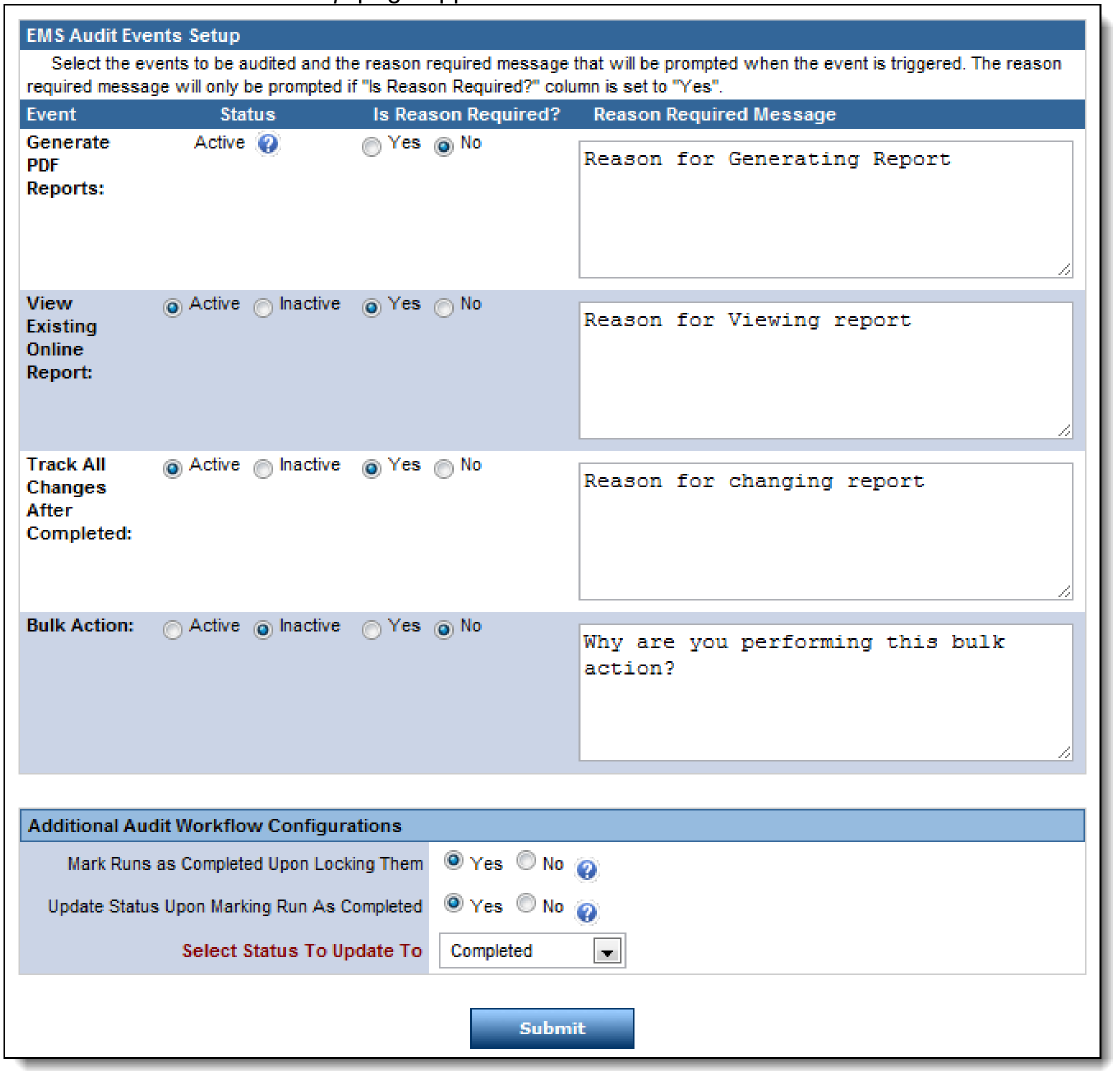
5. To enable your service's information to be exported through the Data Exchange, select *On.*
   OR
   To prevent your service's information from being exported through the Data Exchange, select *Off.*
6. When finished, click *OK.*
   The changes are saved.

2.4 Setting Up EMS Audit Events

Each service administrator may be able to set up which events will require be tracked for auditing and which will request or require a reason for users performing the event. If these options are disabled, they are controlled for all services by the state administrator.

1. From the top left, click *My Service.*
2. Select the *Setup* tab.
3. Under the *Service Settings and Resources* section, select *Configuration.*
   A sub-menu appears.

4. Under *Configuration,* select *EMS Audit.*
   The *EMS Audit Events Setup* page appears.



5. To require users who generate a PDF report to enter a reason for doing so,
   a. In the *Generate PDF Reports* section, in the *Is Reason Required* column, select *Yes.*
   b. In the *Reason Required Message* text box, type the message that should appear to prompt users to add a reason.
6. To track users who view existing reports online, in the *View Existing Online Report* section, click *Active.*
7. To require users who view existing reports online to enter a reason for doing so,
   a. In the *View Existing Online Report* section, in the *Is Reason Required* column, select *Yes.*
   b. In the *Reason Required Message* text box, type the message that should appear to prompt users to add a reason.
8. To keep track of all changes to a run form after it has been marked as completed, in the *Track All Changes After Completed* section, select *Active.*
   The *Additional Audit Workflow Configurations* section appears at the bottom of the page.
9. To require users who make changes to a report that was marked as completed to enter a reason for doing so,
   a. In the *Track All Changes After Completed* section, in the *Is Reason Required* column, select *Yes.*

   b. In the *Reason Required Message* text box, type the message that should appear to prompt users to add a reason.

10. To keep track of any user who performs a bulk action (e.g., generates a batch print), in the *Bulk Action* section, select *Active.*
11. To require users who perform bulk actions to record a reason for doing so,
    a. In the *Bulk Action* section, in the *Is Reason Required* column, select *Yes.*
    b. In the *Reason Required Message* text box, type the message that should appear to prompt users to add a reason.
12. To automatically mark run reports as completed for auditing when they are locked, in the *Mark Runs as Completed Upon Locking Them* section, click *Yes.*

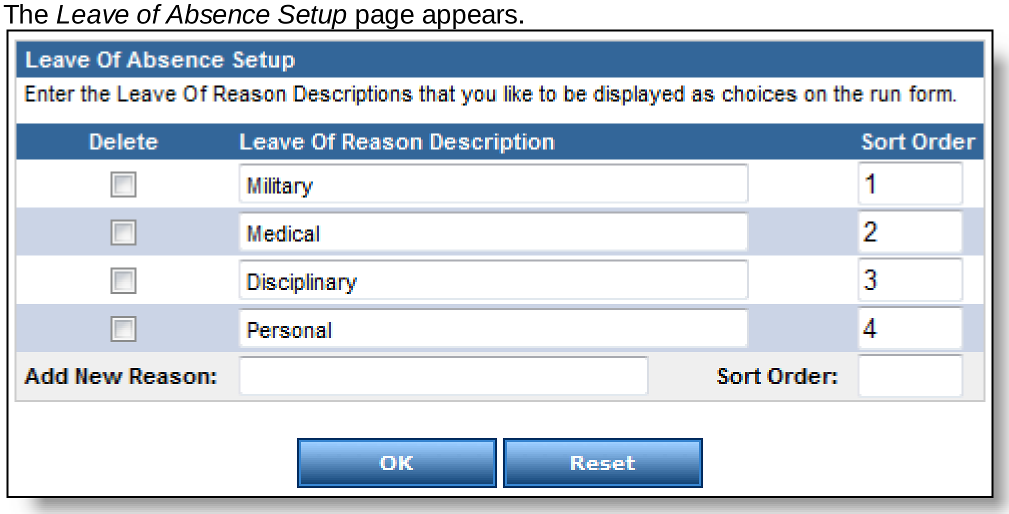
    NOTE: This field will not be displayed unless you choose to track all changes after run reports are completed.
13. To automatically update the run report's status when it is marked for completion for auditing,
    a. In the *Update Status Upon Marking Run as Completed* section, select *Yes.*
    b. From the *Select Status to Update To* drop down menu, select the new desired status.

       NOTE: These fields will not be displayed unless you choose to track all changes after run reports are completed.
14. When finished, click *Submit.*

2.5 Working with Leave of Absence Reasons

Administrators can add reasons for leaves of absence, which can then be used when recording a leave of absence on a staff member's profile.

1. From the top left, click *My Service.*
2. Select the *Setup* tab*.*
3. Under the *Service Settings and Resources* section, select *Configuration.*
   A sub-menu appears.
4. Under *Configuration,* select *Leave Of Absence.*
   The *Leave of Absence Setup* page appears.

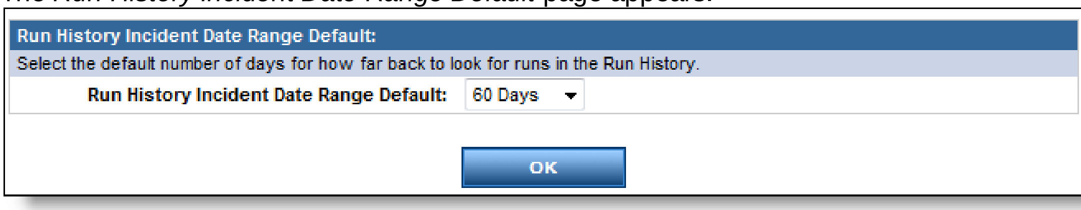


5. To add a new reason, in the *Add New Reason* row, type the reason and its desired order in the list of reasons.
6. Click *OK.*
7. To remove a reason, select the corresponding *Delete* checkbox.
8. Click *OK.*
9. To change a reason's information, in the text boxes, make the desired changes.
10. Click *OK.*

2.6 Setting a Default Date Range for Run History Searches

When searching run history, a default date range automatically appears for the search. You can set up the length of time before the current date that should be automatically entered for searches.

1. From the top left, click *My Service.*
2. Select the *Setup* tab.
3. Under the *Service Settings and Resources* section, select *Configuration.* A sub-menu appears.
4. Under *Configuration,* select *Run History.* The *Run History Incident Date Range Default* page appears.

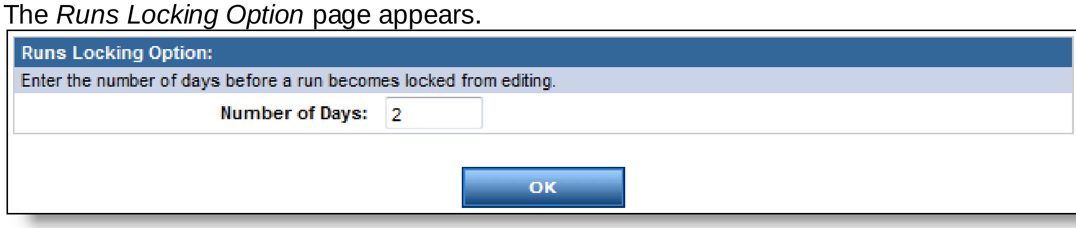


5. From the *Run History Incident Date Range Default* drop down menu, select the desired time period before the current date that should be selected as the default date range.
6. Click *OK.*

2.7 Setting Up Run Locking

You can choose to automatically lock runs for editing a certain number of days after they are created. If this option is disabled, these settings are controlled by your system administrator.

1. From the top left, click *My Service.*
2. Select the *Setup* tab.
3. Under the *Service Settings and Resources* section, select *Configuration.* A sub-menu appears.
4. Under *Configuration,* select *Run Locking.* The *Runs Locking Option* page appears.



5. In the *Number of Days* text box, type the number of days that should pass before a run is locked.
6. Click *OK.*

2.8 Setting Up Categories for Documents

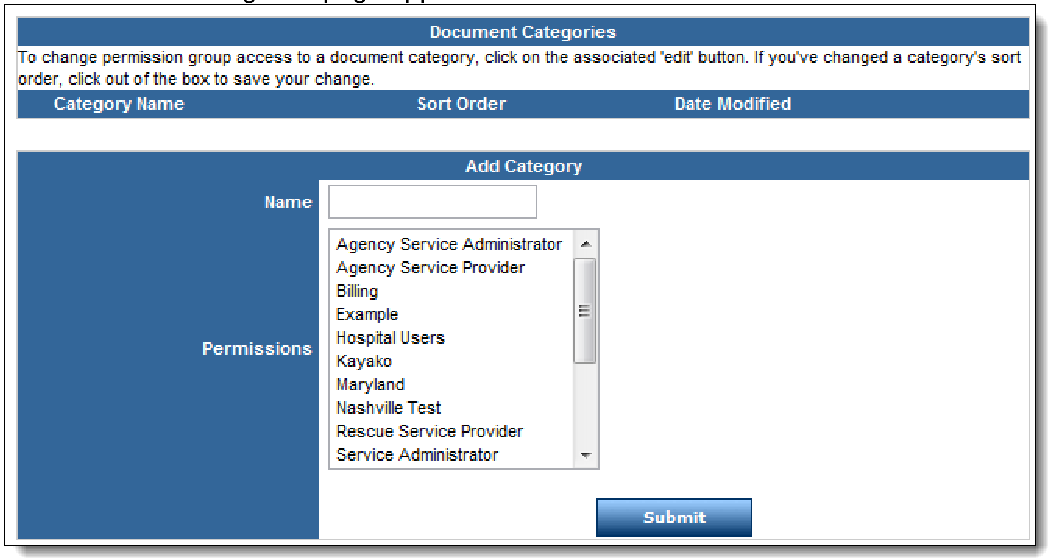
You can create categories to organize and control access to documents that you add to staff profiles. After setting up a new category, you can assign which permission groups should be able to access documents that are assigned to that category.

Adding a New Document Category

You can set up new document categories for your service as needed.

1. From the top left, click *My Service.*
2. Select the *Setup* tab.

3. Under the *Service Settings and Resources* section, select *Configuration.*
   A sub-menu appears.
4. Under *Configuration,* select *Document Categories.*
   The *Document Categories* page appears.



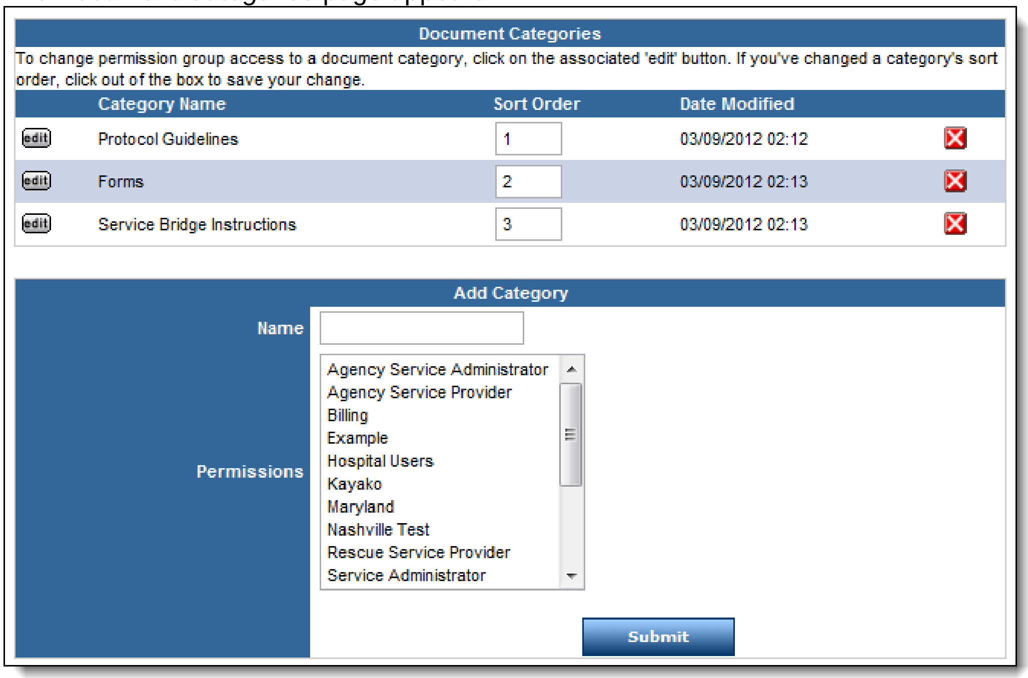
5. In the *Name* text box, type the name of the category.
6. In the *Permissions* scroll list, select all permission groups that should be able to view documents in this category.
   HINT: To select multiple permission groups, press and hold the *Ctrl* key while clicking each desired permission group.
7. Click *Submit.*
   The document category is saved.

Editing an Existing Document Category

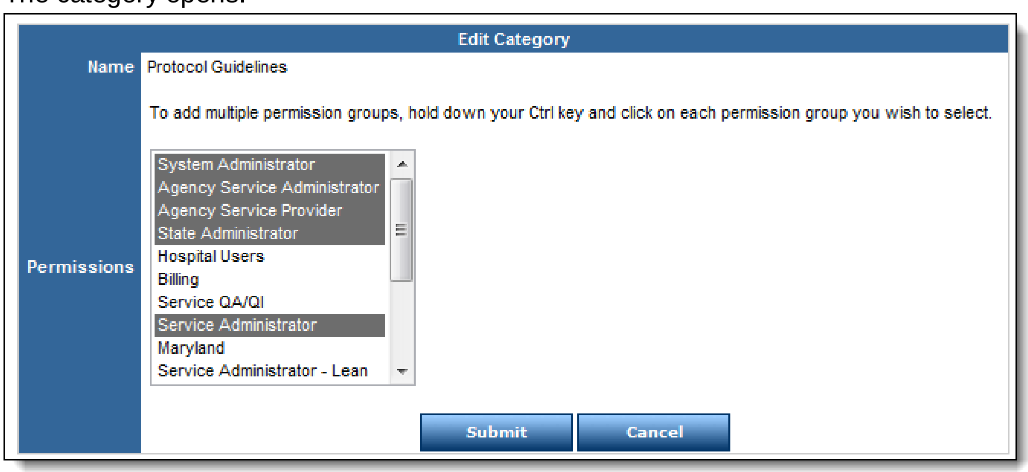
You can make changes to which permission groups can view documents in a category that has already been created.

1. From the top left, click *My Service.*
2. Select the *Setup* tab.
3. Under the *Service Settings and Resources* section, select *Configuration.*
   A sub-menu appears.

4. Under *Configuration,* select *Document Categories.*
   The *Document Categories* page appears.



5. Click the *Edit* button for the category you want to work with.
   The category opens.



6. To select another permission group, press and hold the *Ctrl* key while clicking each desired permission group.
7. To remove access for a permission group that current has access to this category, click the name of that permission group.
   The permission group is deselected.
8. When finished, click *Submit.*
   The changes are saved.

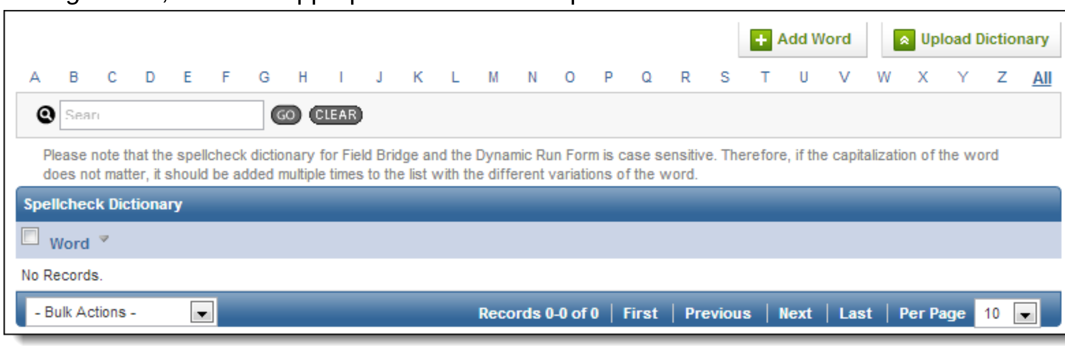
2.9 Adding Words to the EMS Run Form Spellcheck Dictionary

You can either add individual words to the spellcheck dictionary for your Field Bridge run forms and dynamic run forms, or you can upload a file with multiple words. Note that the spellcheck dictionary is case sensitive, so if you were to enter a word with all lowercase letters and a provider types that word into a run form with a capital letter, the word would still be marked as misspelled.

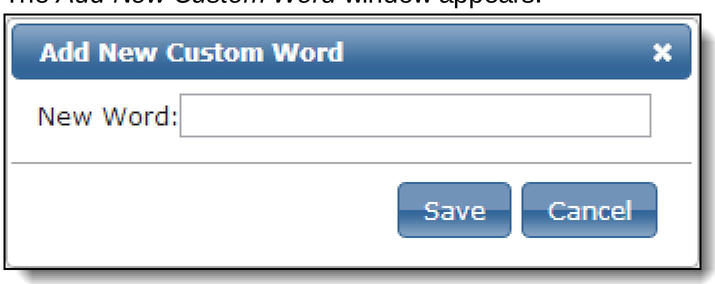
Adding an Individual Word to the Spellcheck Dictionary

You can add individual words as needed to prevent the Check Spelling tool from marking them as misspelled in run forms.

1. From the top right, click *My Service.*
2. Select the *Setup* tab.
3. Under *Service Settings and Resources* > *Configuration,* click *Spellcheck Dictionary.* The *Spellcheck Dictionary* page appears.
   HINT: If no sub-menu is displayed under *Service Settings and Resources* or *Configuration,* click the appropriate header to expand the sub-menu.



4. Click *Add Word.*
   The *Add New Custom Word* window appears.

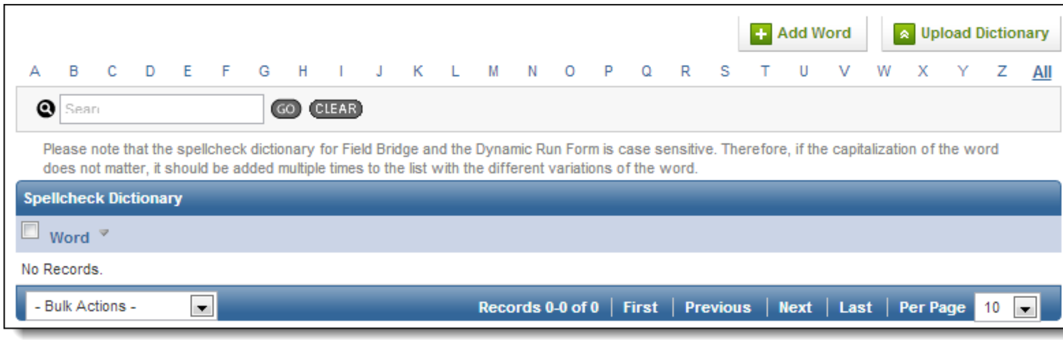


5. In the *New Word* text box, type the word.
   NOTE: Remember that the spellcheck dictionary is case sensitive.
6. Click *Save.*
   The word is added.

Uploading a Dictionary to the Spellcheck Dictionary

You can upload a collection of words to the spellcheck dictionary to quickly add multiple words. To create this collection, add each of the words to a spreadsheet file (e.g., a Microsoft Excel spreadsheet), with each word in its own row in the first column.

1. From the top right, click *My Service.*
2. Select the *Setup* tab.
3. Under *Service Settings and Resources* > *Configuration,* click *Spellcheck Dictionary.*
   The *Spellcheck Dictionary* page appears.
   HINT: If no sub-menu is displayed under *Service Settings and Resources* or *Configuration,* click the appropriate header to expand the sub-menu.



4. Click *Upload Dictionary.*
   The *Upload Dictionary* window appears.
5. Click *Choose File.*
   The *Choose File* dialog box appears.
6. Navigate to and select the dictionary file.
7. Click *Open.*
   The file is selected and the *Choose File* dialog box closes.
8. Click *Upload.*
   The file is uploaded and all included words are added to the dictionary.

2.10 Working with Repeat Patients

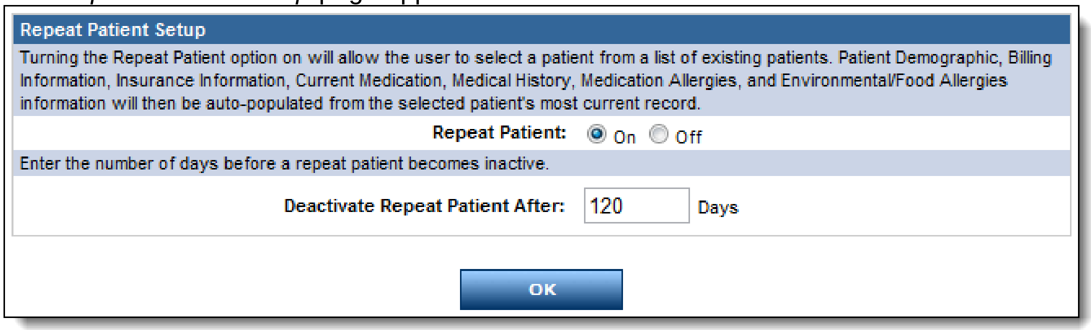
The Repeat Patient feature allows you to keep records for patients who you frequently encounter, allowing your providers to quickly pull saved information about those patients (e.g., name, address, medical history, allergies, next of kin) into their run forms instead of filling out the information manually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

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.

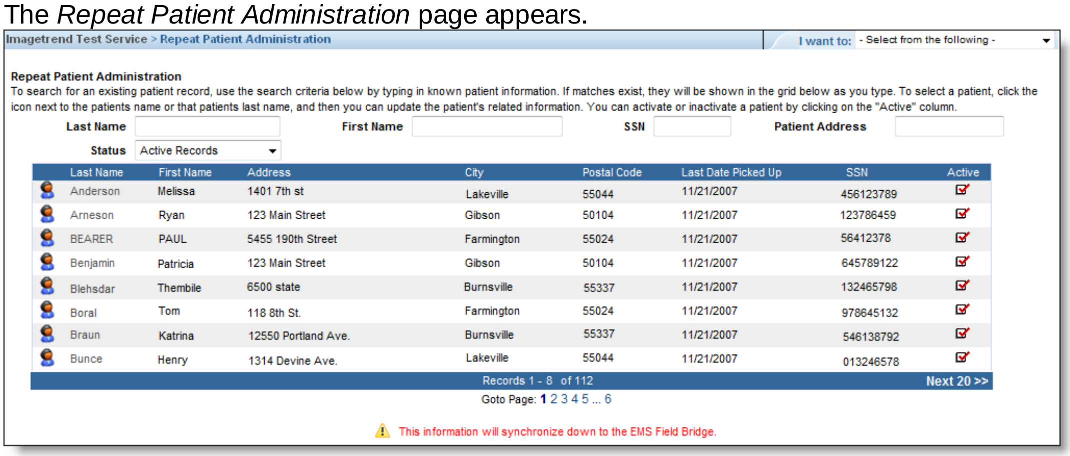


5. In the first section, select whether the repeat patient feature should or should not be available for use.
6. **OPTIONAL:** In the *Deactivate Repeat Patient After* section, type the number of days after which a repeat patient should be deactivated if not treated or transported.
7. When finished,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

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.

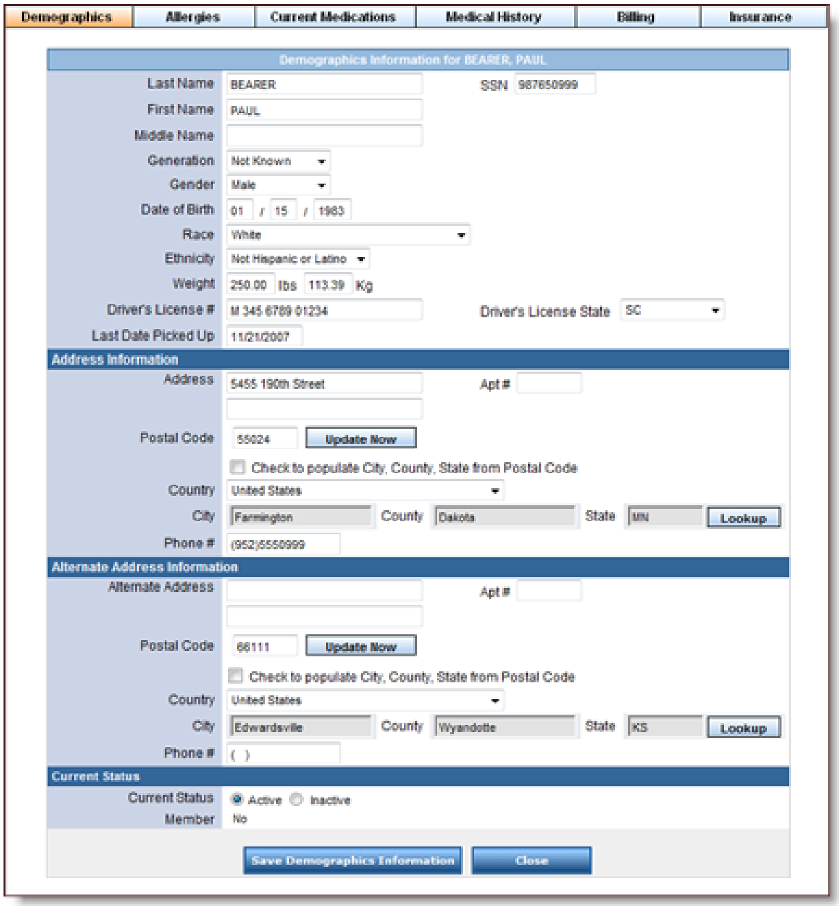
1. From the upper left, select *My Service.*
2. Select the *Setup* tab.
   The *Setup* tab appears.
3. Under the *Service Settings and Resources* section, select *EMS.*
   A sub-menu appears.
4. Under *EMS,* select *Repeat Patient Records.*
   The *Repeat Patient Administration* page appears.



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	

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 State 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 16–17 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.*

2.11 Working with Service Defined Questions

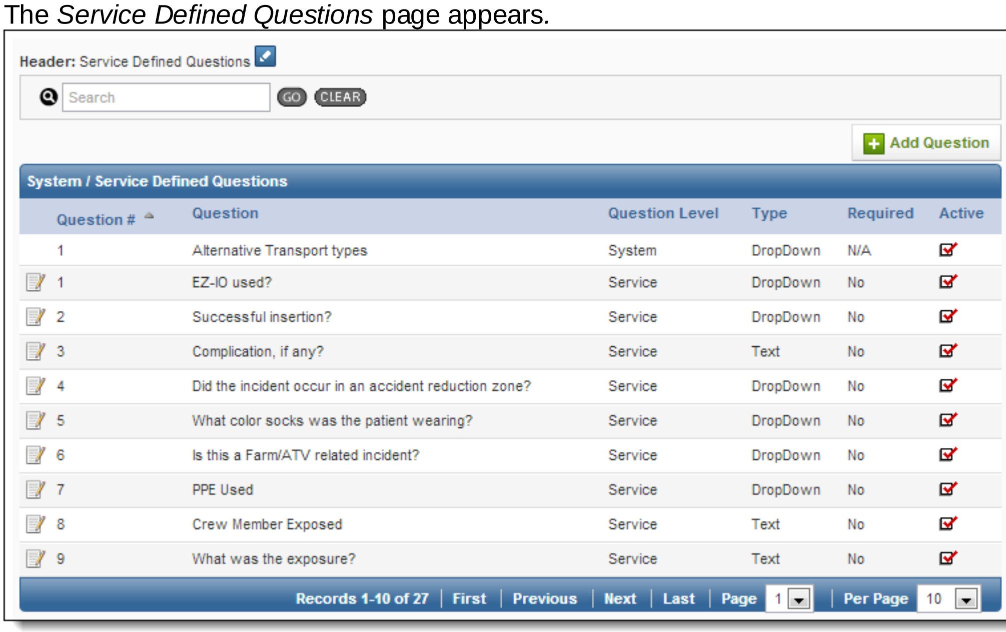
Administrators can create new questions and a section to include them in on their service's run form. This allows a particular service to gather data that is particularly relevant to their service but may not be already included in the form. Depending on permissions, all users will generally be able 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.

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



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	

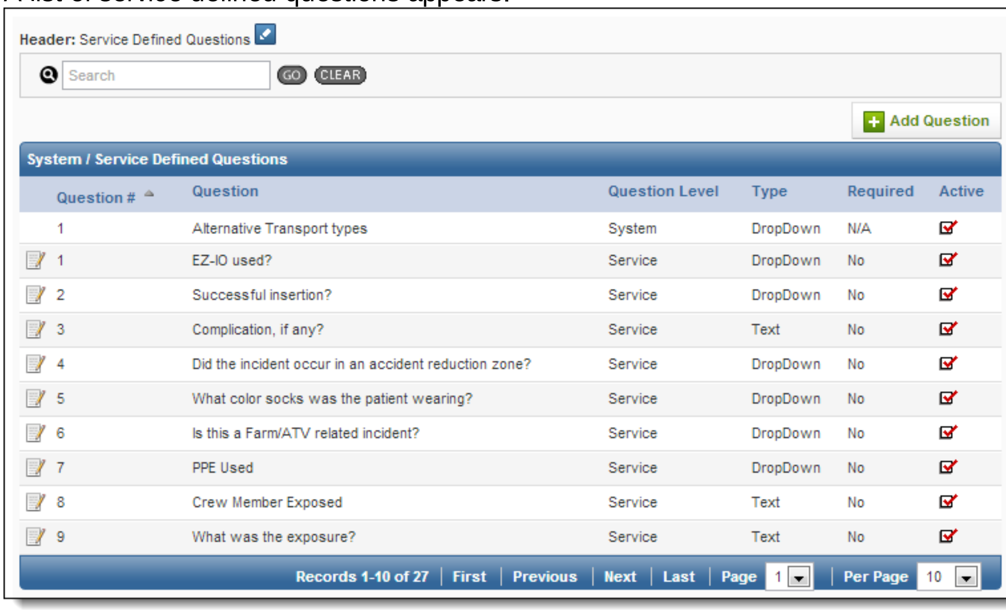
Records 1-10 of 27 | First | Previous | Next | Last | Page 1 | Per Page 10

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

Viewing and Editing Service Defined Questions

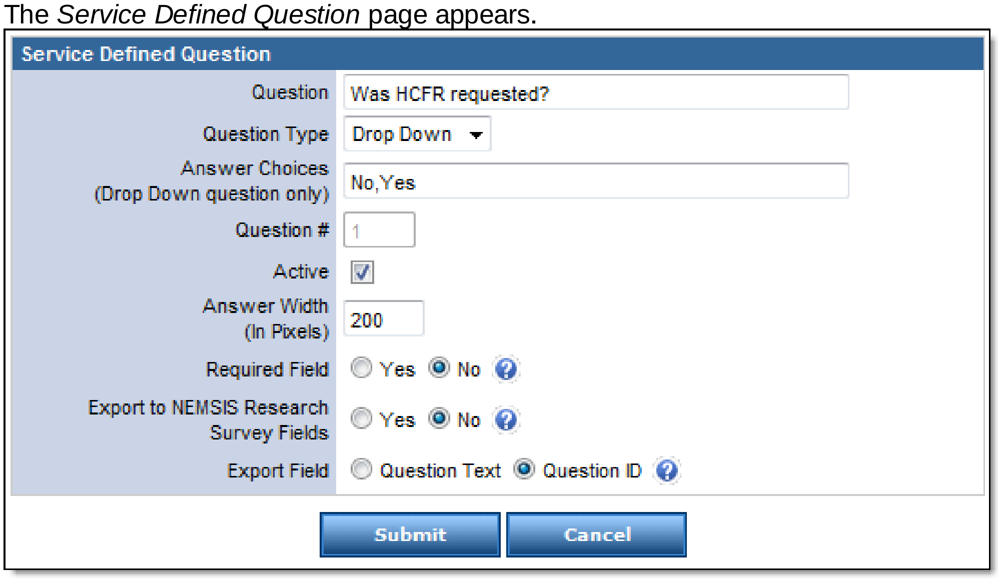
Administrators can view and edit service defined questions from the same place.

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

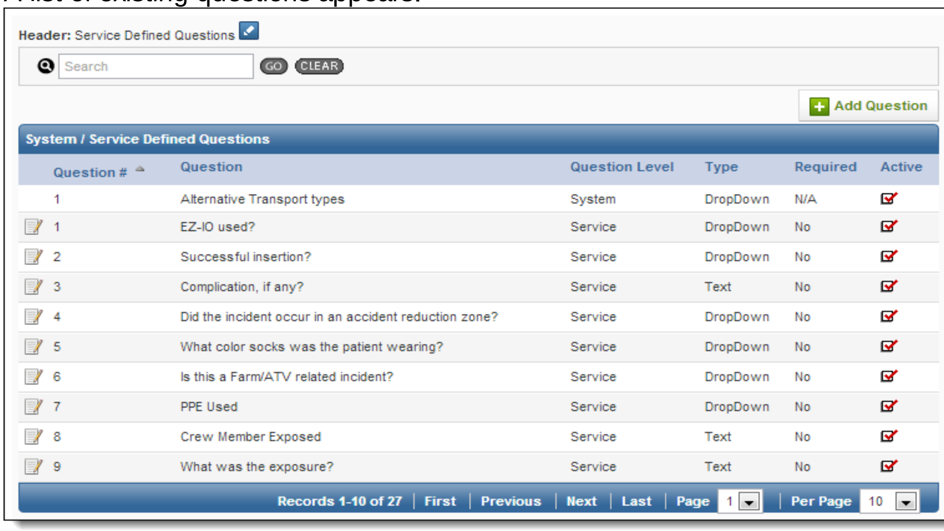


6. **OPTIONAL:** To change the question, available answers, or question setup,
   a. Use the provided fields to enter all information about the question.
      NOTE: For this option to appear on a run form, be sure the *Active* checkbox is selected. To include this run in validity scores, ensure that *Yes* is selected in the *Required Field* section.
   b. When finished, to save the changes, click *Submit.*

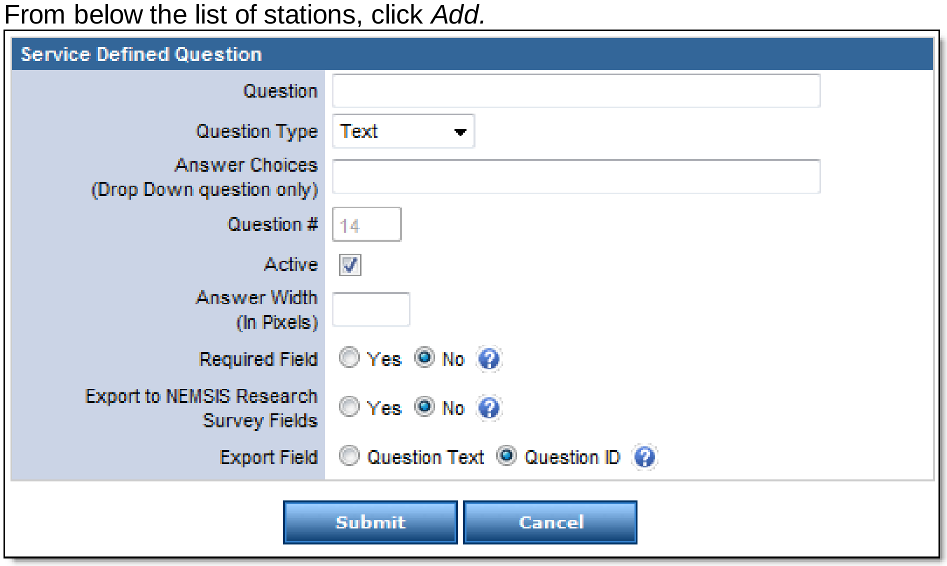
Adding a New Service Defined Question

Only administrators can add a new service defined question to the system.

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



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.*

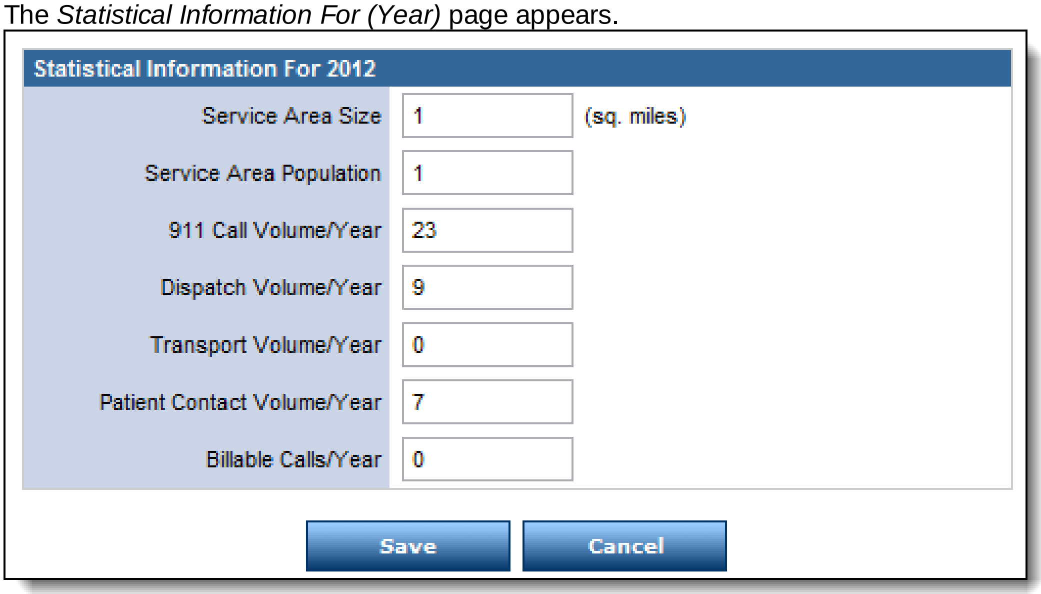
2.12 Working with Statistical Year Information

Administrators can view statistical information about their service in a particular year, as well as adding or editing the information for particular years.

Viewing and Editing Information for a Year

Statistical information can be viewed and edited from the same page.

1. From the top left, click *My Service.*
2. Select the *Setup* tab.
3. Under the *Service Settings and Resources* section, select *EMS.*
   A sub-menu appears.
4. Under *EMS,* select *Statistical Year Information.*
5. From the *Information for the following statistical year(s) is available* drop down menu, select the correct year.
6. Click *Continue.*
   The *Statistical Information For (Year)* page appears.

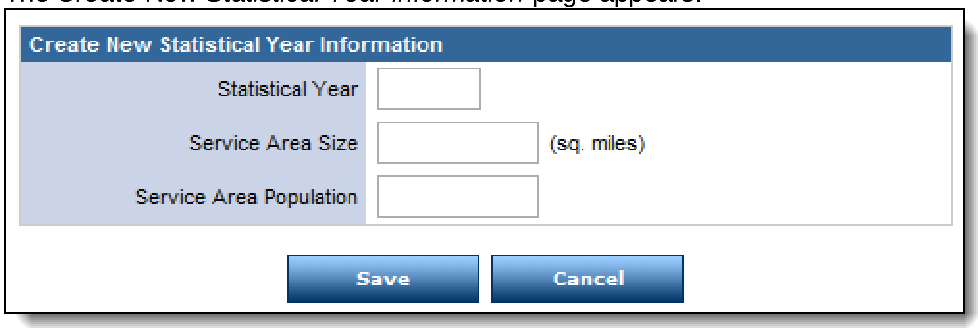


7. **OPTIONAL:** To edit the information for that year, in the provided text boxes, type any desired information.
8. To keep any changes, click *Save.*
   To return to the list of statistical years without saving any changes, click *Cancel.*

Adding Information for a New Year

Administrators can add a new year to the list and fill in the desired information.

1. From the top left, click *My Service.*
2. Select the *Setup* tab.
3. Under the *Service Settings and Resources* section, select *EMS.*
   A sub-menu appears.
4. Under *EMS,* select *Statistical Year Information.*
5. Click *Create New Year.*
   The *Create New Statistical Year Information* page appears.

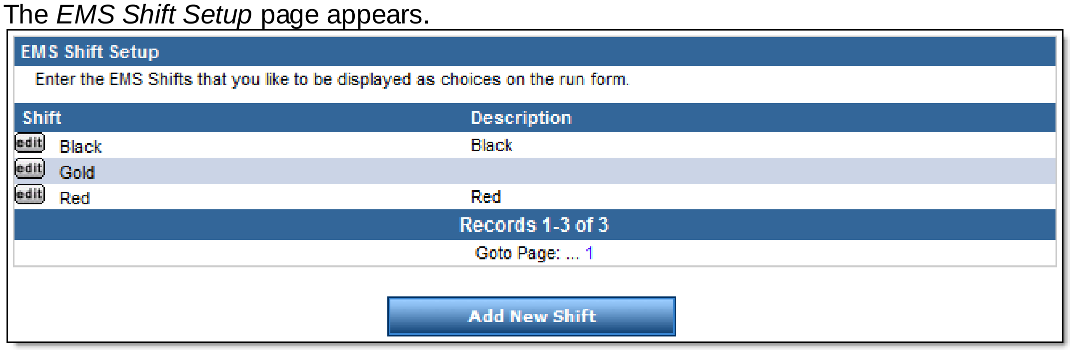


6. In the provided fields, type all desired information.
   NOTE: The user must fill in at least the *Statistical Year* text box.
7. To keep the information and the new year in the system, click *Save.*
   To return to the list of statistical years without saving the new year information, click *Cancel.*
   NOTE: In order to cancel, the *Statistical Year* text box must contain a valid year, although this year information will not be saved.

2.13 Setting Up EMS Shifts

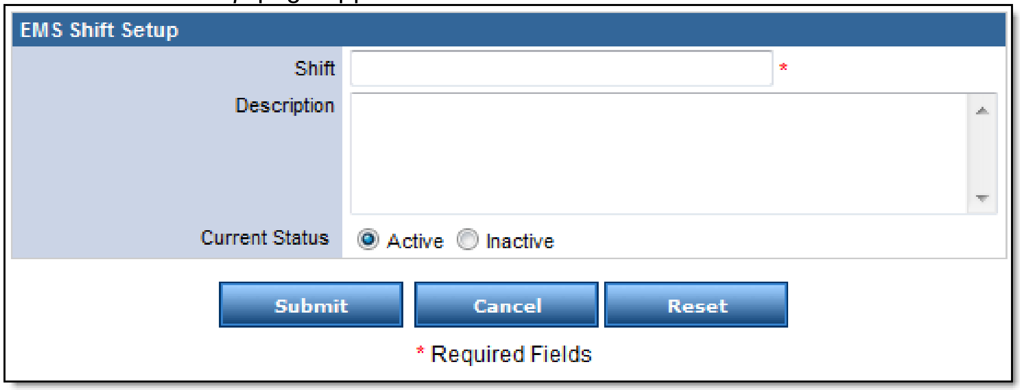
You can record which EMS shift is on duty either on the Dashboard of a Field Bridge or, if the field is added to a run form, on your State Bridge run form. Before this, however, you must set up the names of your shifts.

1. 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.

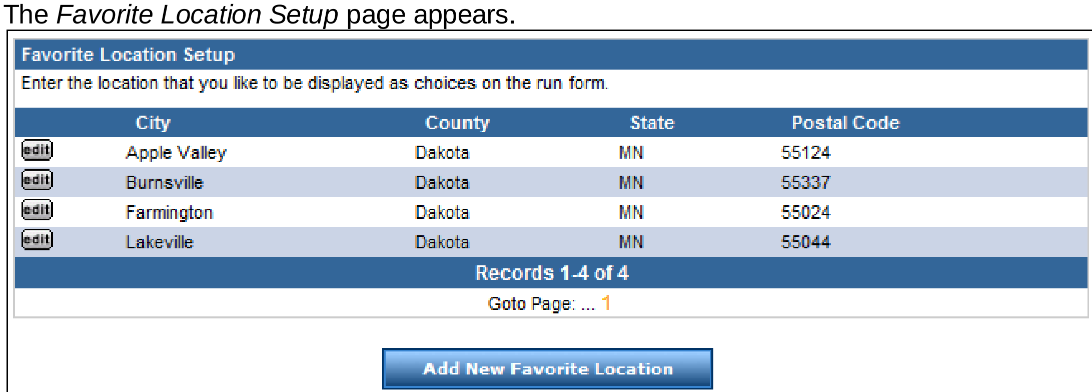


6. In the *Shift* text box, type the name of the shift.
7. In the *Description* text box, type any additional information about the shift.
8. In the *Current Status* section, to mark this shift as currently available for use in the system, select *Active.*
   To save this shift for reference in the system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

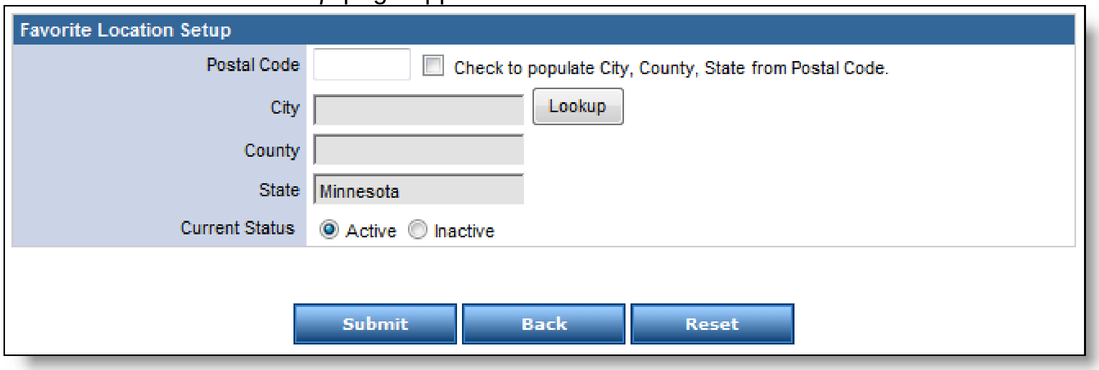
2.14 Adding Favorite Locations

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.

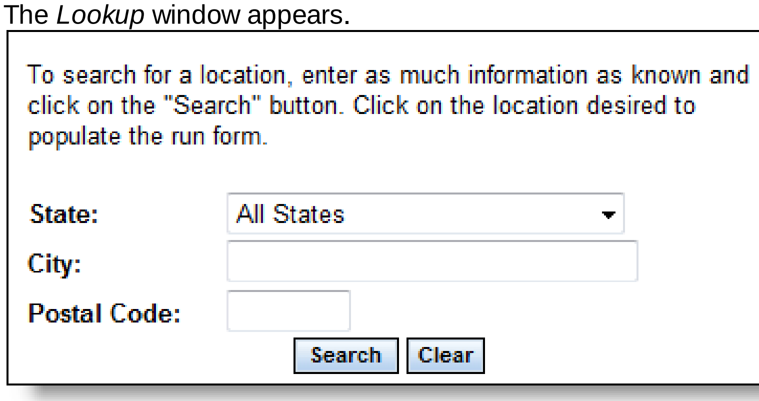
1. From the top left, click *My Service.*
2. Select the *Setup* tab.
3. Under the *Service Settings and Resources* section, select *Service.*
   A sub-menu appears.
4. Under *Service,* select *Favorite Locations.*
   The *Favorite Location Setup* page appears.



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.



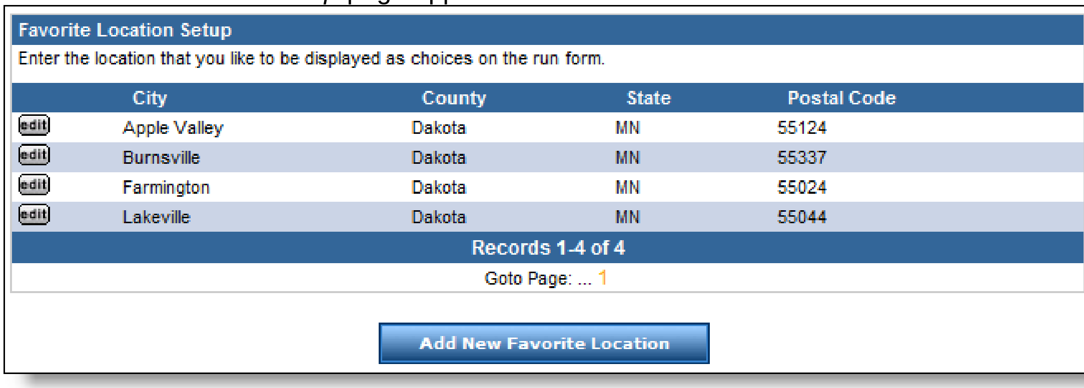
   b. Using the provided fields, enter as much information as is known about the desired location.
   c. Click *Search.*
      A list of matching locations appears.
   d. Click the desired location.
      The fields are populated with the selected information.
8. In the *Current Status* section, select 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.

Setting Up a New City

If you need to set up a favorite location for a city that does not appear when you use the *Lookup* option, you can do so.

1. 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.



Favorite Location Setup

Enter the location that you like to be displayed as choices on the run form.

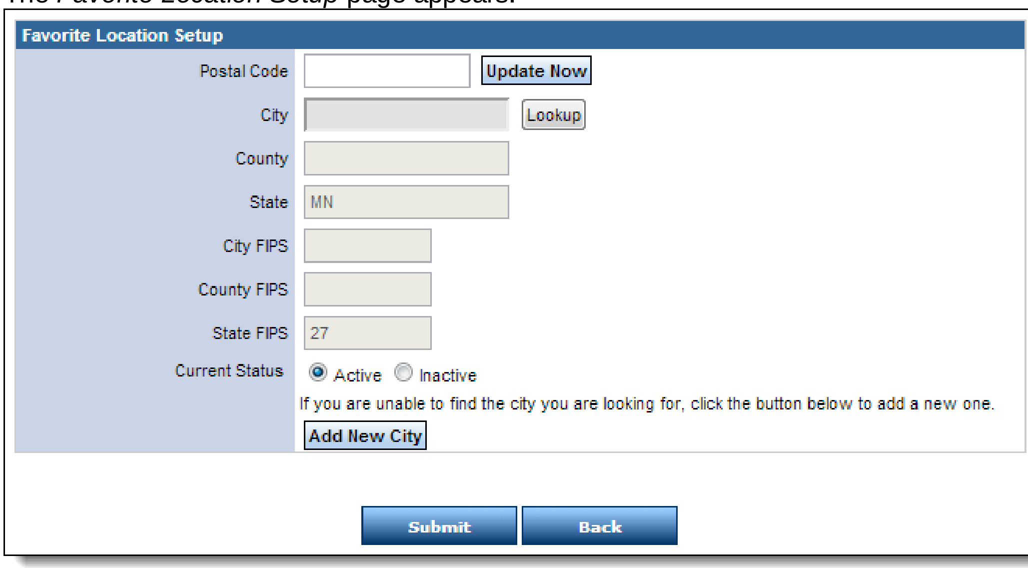
	City	County	State	Postal Code
edit	Apple Valley	Dakota	MN	55124
edit	Burnsville	Dakota	MN	55337
edit	Farmington	Dakota	MN	55024
edit	Lakeville	Dakota	MN	55044

Records 1-4 of 4

Goto Page: ... 1

Add New Favorite Location

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



Favorite Location Setup

Postal Code | Update Now

City | Lookup

County

State: MN

City FIPS

County FIPS

State FIPS: 27

Current Status: Active Inactive

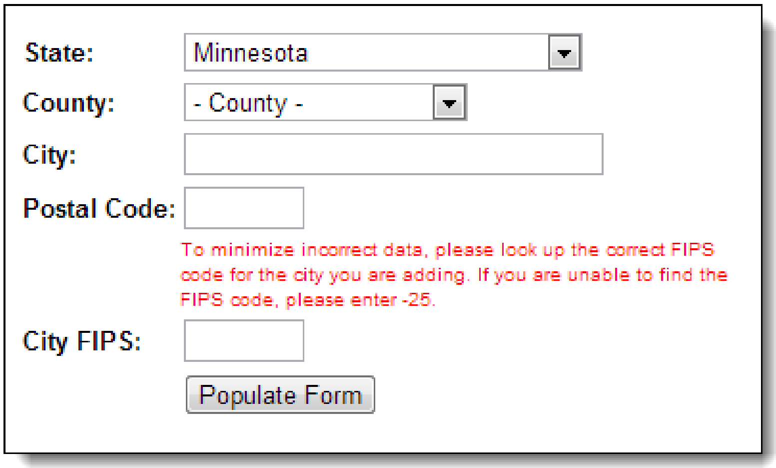
If you are unable to find the city you are looking for, click the button below to add a new one.

Add New City

Submit | Back

6. From the bottom of the page, click *Add New City.*
   The *Add New Favorite Location* window appears.

7. From the *State* drop down menu, select the state that the new city is in.
   Additional fields appear.



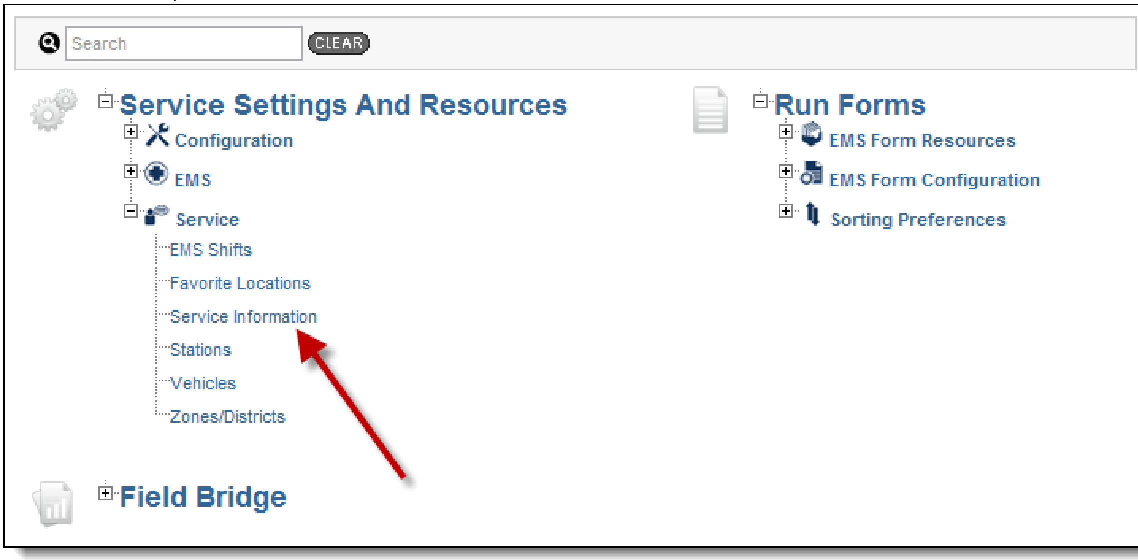
8. From the *County* drop down menu, select the county that the new city is in.
9. In the *City* text box, type the name of the city.
10. In the *Postal Code* text box, type the postal code for the city.
11. In the *City FIPS* text box, type the FIPS code of the city.
    NOTE: If you cannot find the correct FIPS code, enter *-25*.
12. Click *Populate Form.*
    The city information is entered into the form.
13. Click *Submit.*
    The new city is saved as a favorite location.

2.15 Viewing Basic Service Information

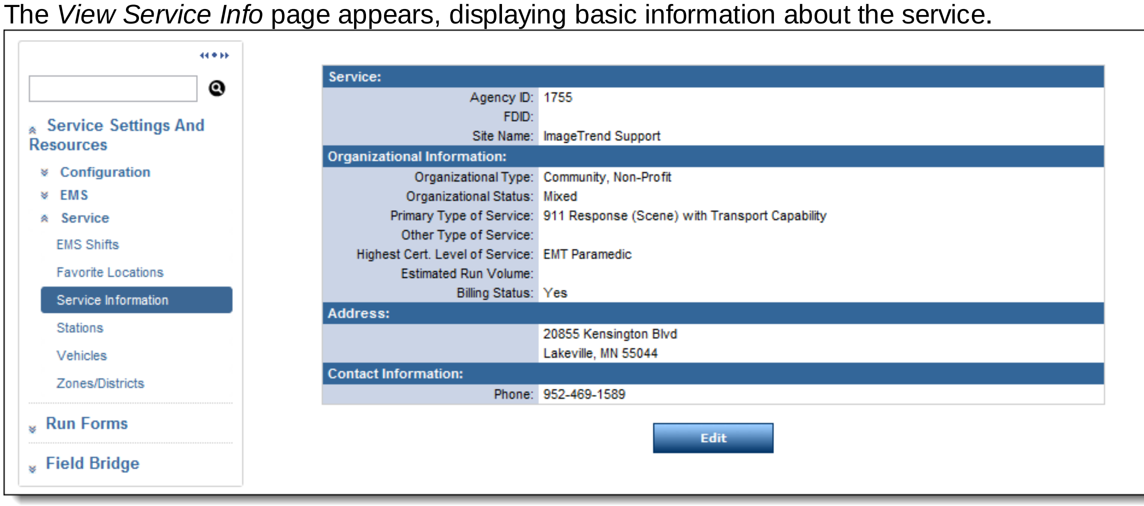
The system keeps a summary of your service's contact and organizational information with the service profile.

1. 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 *Service Information.*



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

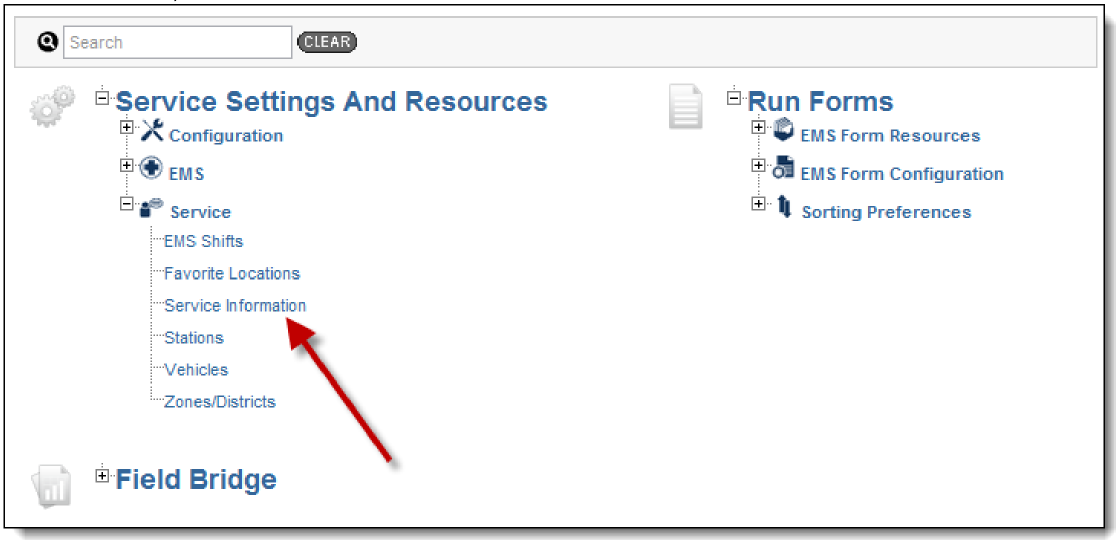


2.16 Editing Basic Service Information

Service information is used to provide contact and identification information to any persons who may have access to the State Bridge or who receive exported data from the system. This is the information that appears in the *View Service Information* section.

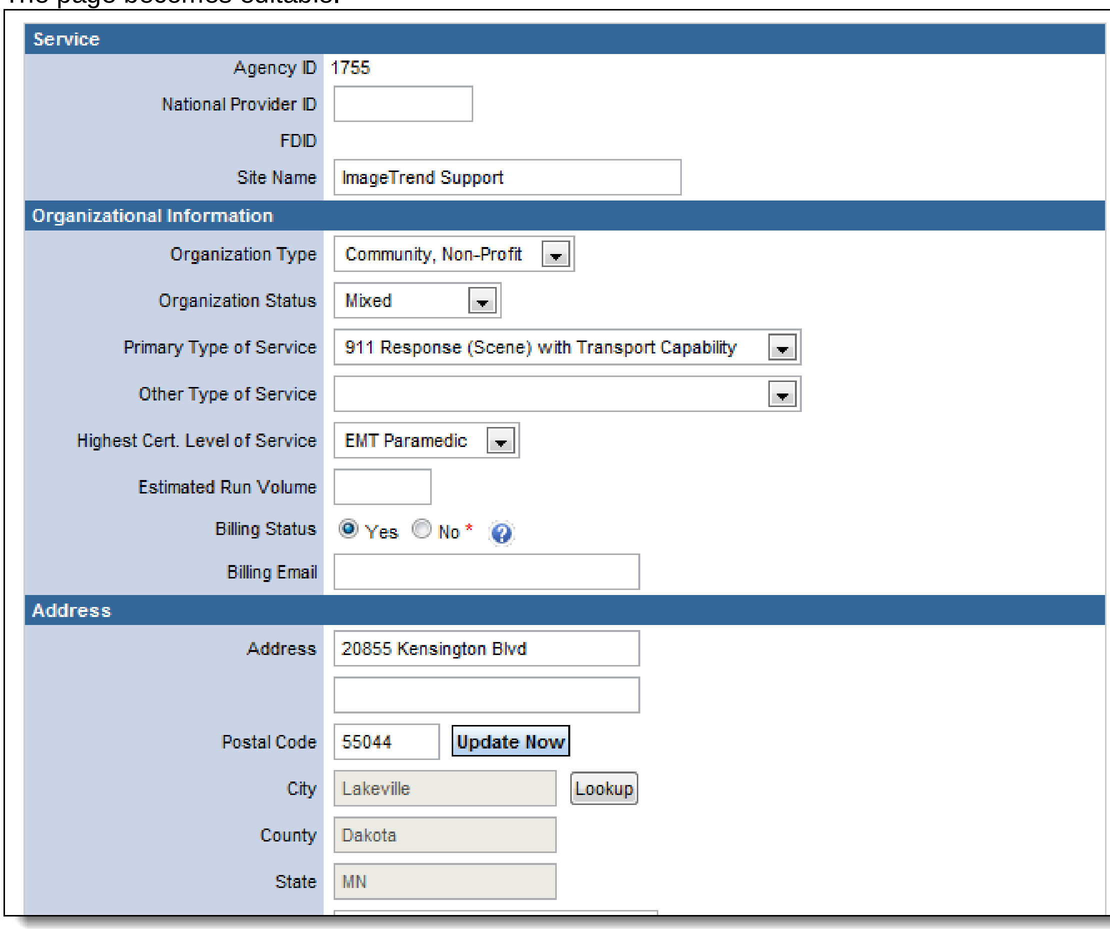
1. From the top left, click *My Service.*
2. Select the *Setup* tab*.*
3. Under the *Service Settings and Resources* section, select *Service.*
   A sub-menu appears.

4. Under *Service*, select *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.*

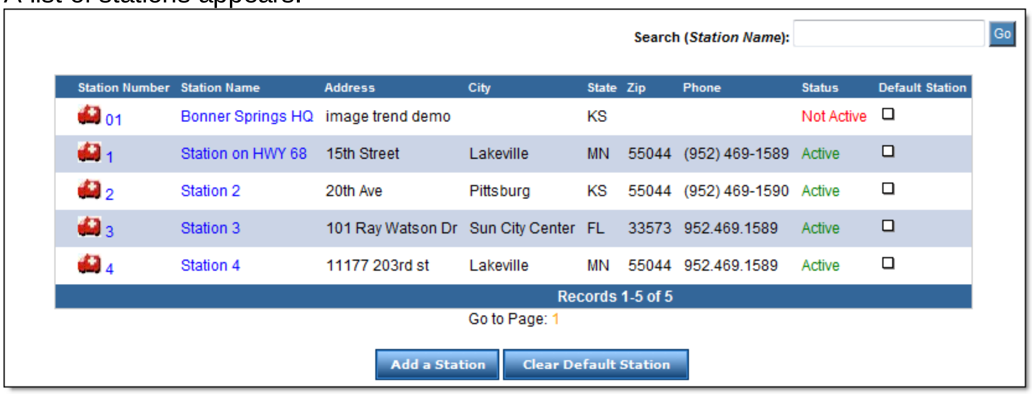
2.17 Working with Stations

A service can create profiles within the State Bridge for multiple stations or divisions. Depending on the permission groups set up for that service, most system users will be able to view the information for each station, but administrators can also change the station information or add a new station to the system.

Viewing and Editing Station Information

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

1. 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 *Stations.*
   A list of stations appears.


Search (*Station Name*): Go

Station Number	Station Name	Address	City	State	Zip	Phone	Status	Default Station
01	Bonner Springs HQ	image trend demo		KS			Not Active	☐
1	Station on HWY 68	15th Street	Lakeville	MN	55044	(952) 469-1589	Active	☐
2	Station 2	20th Ave	Pittsburg	KS	55044	(952) 469-1590	Active	☐
3	Station 3	101 Ray Watson Dr	Sun City Center	FL	33573	952.469.1589	Active	☐
4	Station 4	11177 203rd st	Lakeville	MN	55044	952.469.1589	Active	☐

Records 1-5 of 5

Go to Page: 1

Add a Station | Clear Default Station

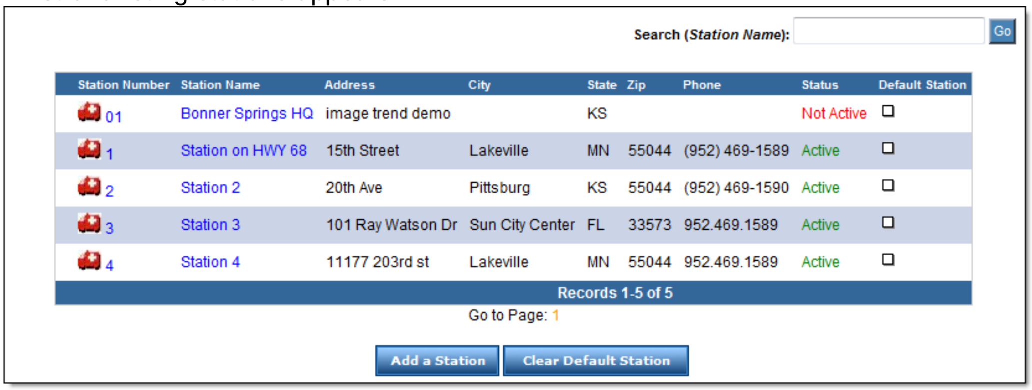
5. To view or edit information for a particular station, click the name, number or *Station* icon  for that station.
   A summary of the station information appears.
6. **OPTIONAL:** To edit the station information,
   a. Click *Edit.*
   b. Using the provided fields, enter any new or different information desired.
   c. When finished, click *OK.*

Adding a New Station

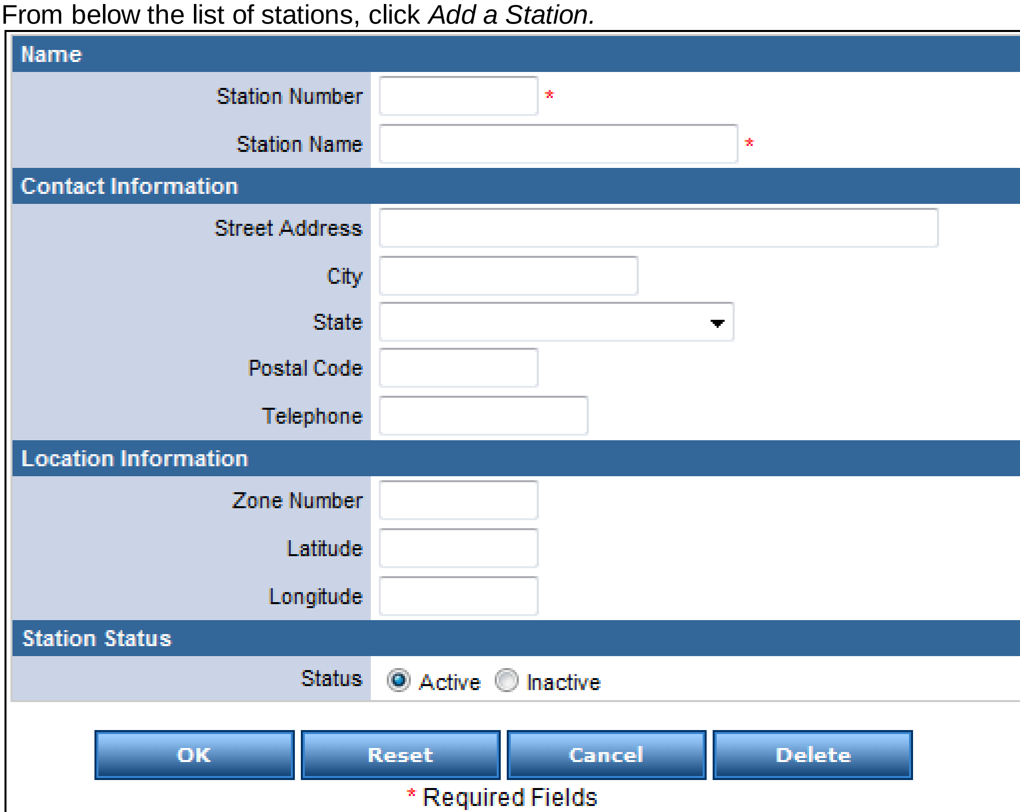
Only administrators can add a new station to the system.

1. 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 *Stations.*
   A list of existing stations appears.



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

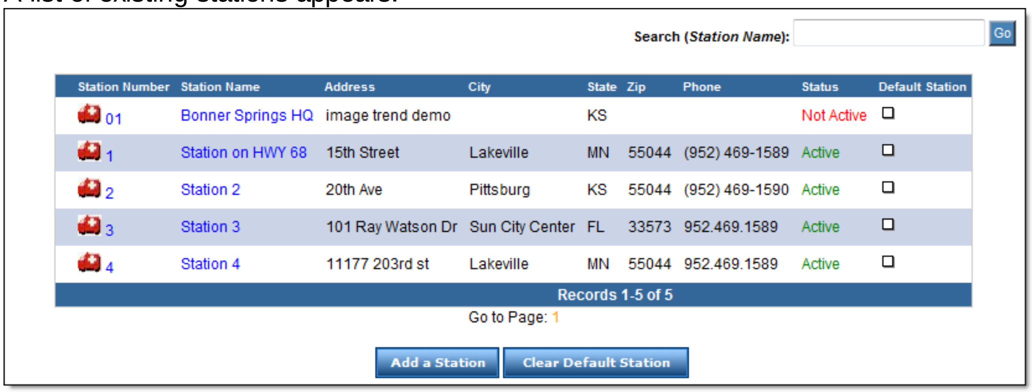


6. Using the provided fields, enter all desired information for the station.
   NOTE: Be sure to enter at least a station number and name and specify whether the station is active or inactive. Active stations can be worked with in the system, while inactive stations will have their information stored in the list of stations but will not appear anywhere else in the system.
7. When finished, to save the new station in the system, click *OK.*
   To clear all fields and start over, click *Reset.*
   To return to the list of stations without saving the new station, click *Cancel.*

Setting a Default Station

A default station is the station that will automatically be selected on new run forms. Your service does not need to set a default station but can choose to do so to save data entry time. For this feature to work, the station you select as the default station must be active.

1. 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 *Stations.*
   A list of existing stations appears.



Search (*Station Name*): Go

Station Number	Station Name	Address	City	State	Zip	Phone	Status	Default Station
01	Bonner Springs HQ	image trend demo		KS			Not Active	☐
1	Station on HWY 68	15th Street	Lakeville	MN	55044	(952) 469-1589	Active	☐
2	Station 2	20th Ave	Pittsburg	KS	55044	(952) 469-1590	Active	☐
3	Station 3	101 Ray Watson Dr	Sun City Center	FL	33573	952.469.1589	Active	☐
4	Station 4	11177 203rd st	Lakeville	MN	55044	952.469.1589	Active	☐

Records 1-5 of 5

Go to Page: 1

Add a Station | Clear Default Station

5. For the station to set as the default, in the *Default Station* column, click the checkbox.
   A check appears, indicating that this is now set as the default station.
6. **OPTIONAL:** To remove any settings controlling the default station,
   a. Click the *Clear Default Station* button.
      A confirmation dialog box appears.
   b. Click *OK.*
      The default station settings are removed and no station is set as the default.

2.18 Working with Vehicle Information

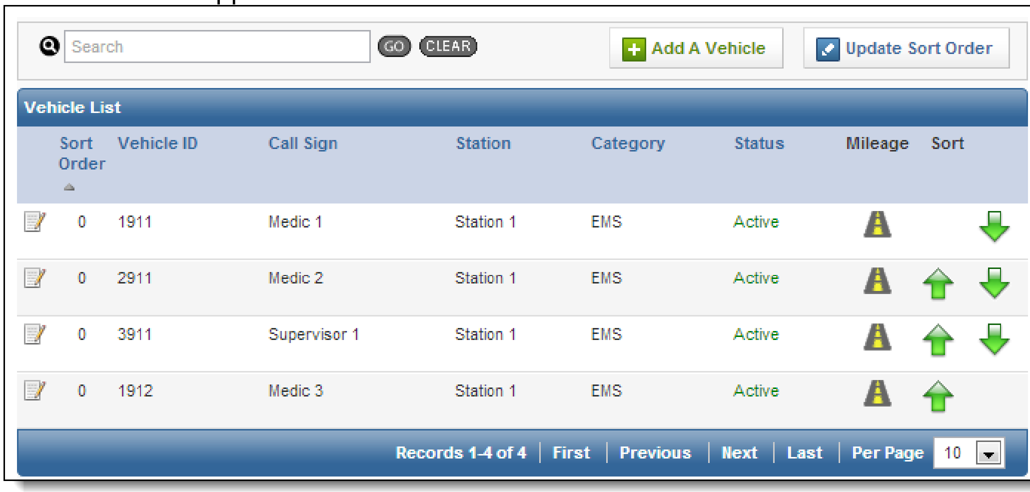
Run forms can document the vehicles that responded to an incident if the vehicle information has been added to the system. Depending on permissions, most system users will be able to view vehicle information, but only administrators will be able to change vehicle information or add or delete a vehicle.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

Viewing and Editing Vehicle Information

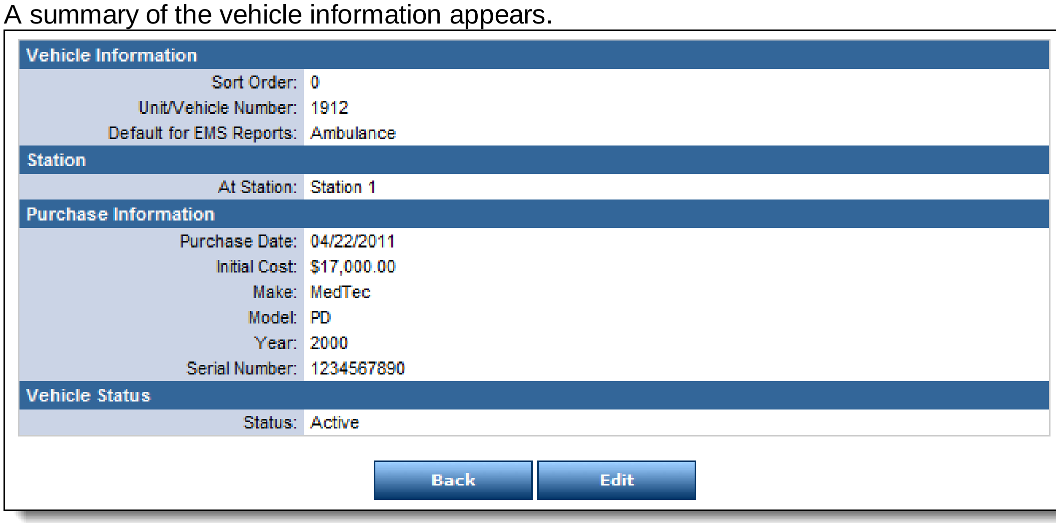
Administrators can view existing vehicle information and, if necessary, change the information for a particular vehicle.

1. 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.



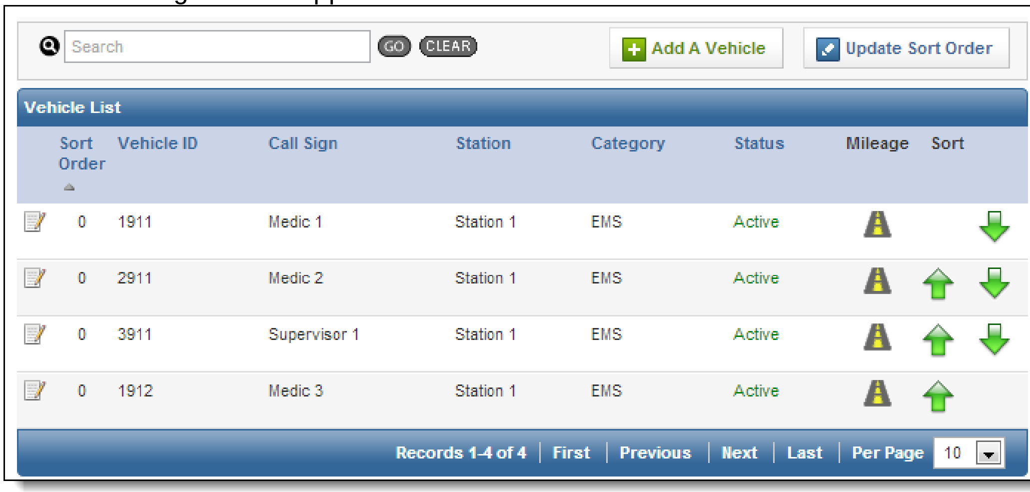
6. **OPTIONAL:** To edit the vehicle information,
   a. Click *Edit.*
   b. Using the provided fields, enter any new or different information desired.
   c. When finished, click *OK.*

Viewing and Entering Vehicle Mileage

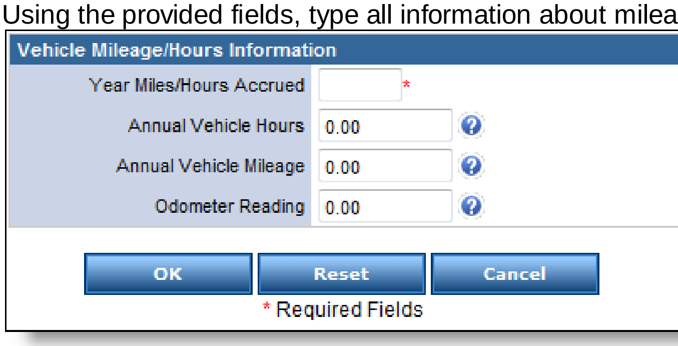
Administrators can keep track of a vehicle's mileage for each year using the EMS State Bridge.

1. 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.



5. For the appropriate vehicle, click the corresponding *Manage Mileage* icon .
   All mileage totals saved in the system appear.
6. **OPTIONAL:** To add information about mileage for a new year,
   a. Click *Add Entry.*
   b. Using the provided fields, type all information about mileage.



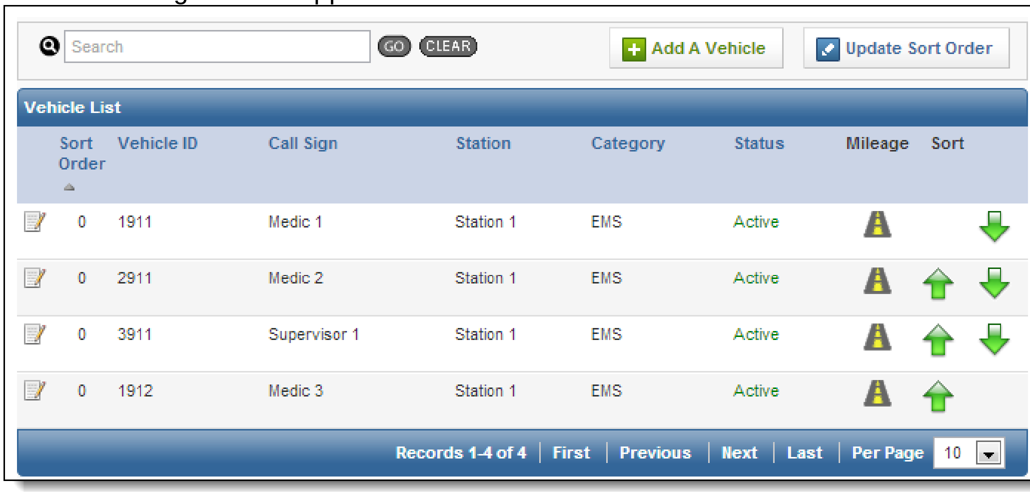
   c. To save the information, click *OK.*
      To clear all fields and start again, click *Reset.*
      To return to the list of mileage totals without saving, click *Cancel.*

Adding a New Vehicle

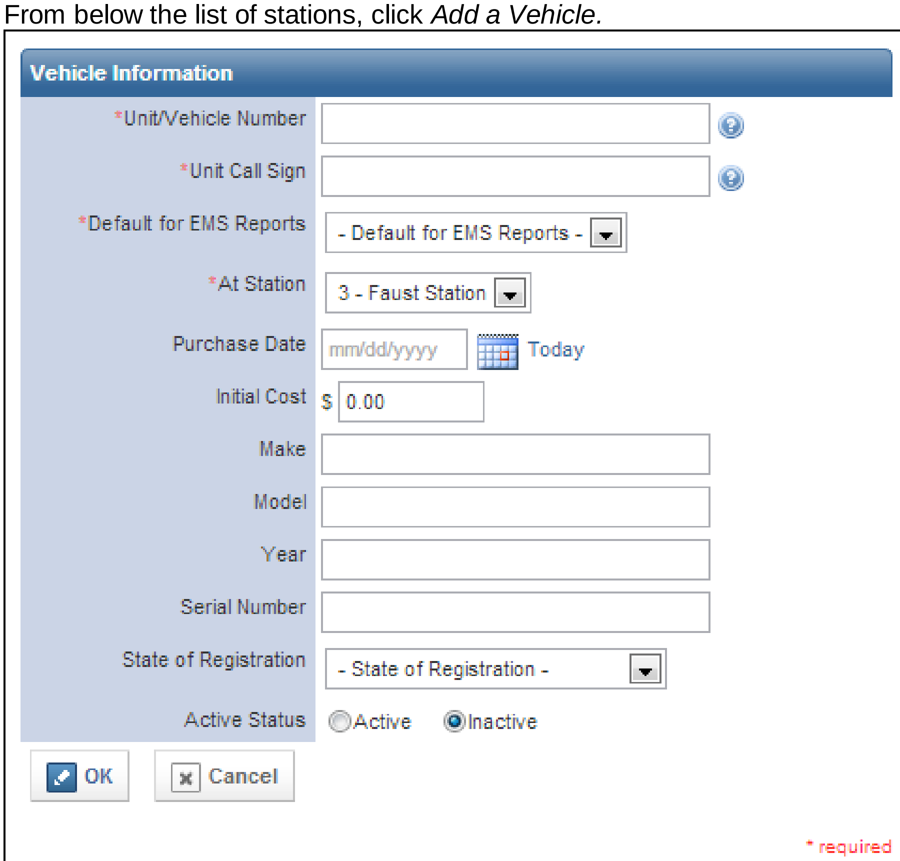
Only administrators can add a new vehicle to the system.

1. 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.



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



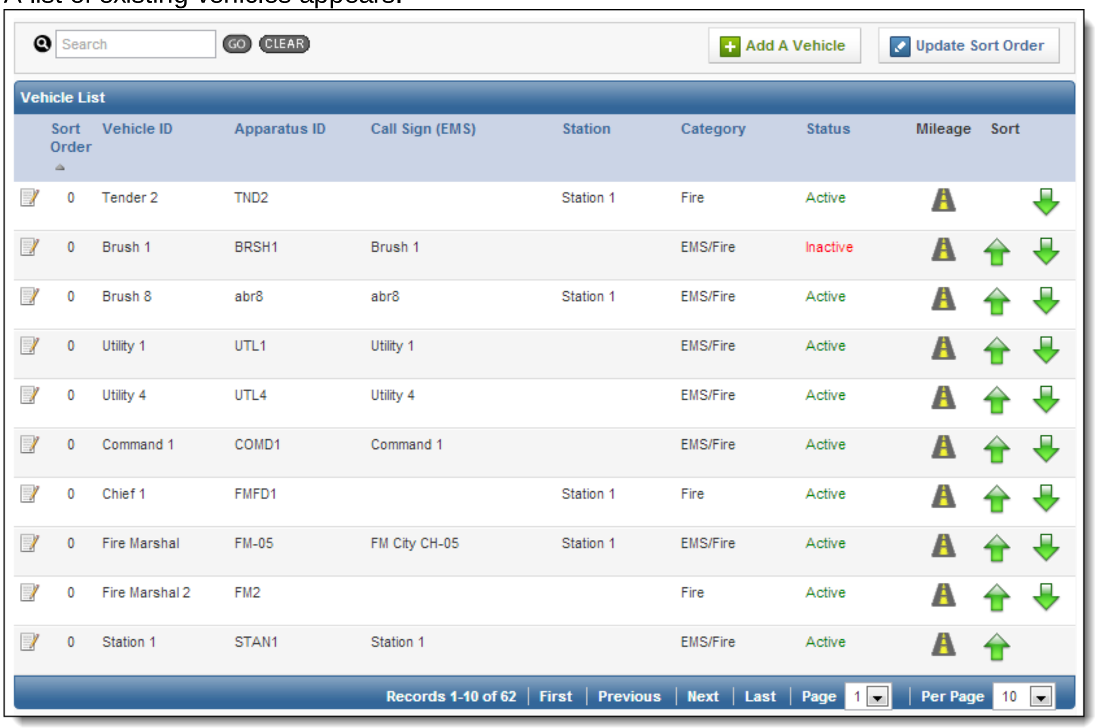
6. In the *Use of Emergency Vehicle* section, select the type of incident this vehicle is used for.
7. In the *Unit/Vehicle Number* text box, type the ID number of the unit.
8. In the *Unit Call Sign* text box, type the call sign of the unit used by dispatch.
9. From the *Default for EMS Reports* drop down menu, select the default vehicle type that should be applied when this vehicle is selected on EMS reports.
10. From the *At Station* drop down menu, select the station that this vehicle is used at.

11. In the remaining fields, enter any information about the vehicle that you would like to track.
12. In the *Active Status* section, select whether you want this vehicle to be active and available for use, or inactive and saved in the system only for reference.
13. 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.*

Changing the Order of Vehicles

You can update the order in which vehicles will appear on any list of vehicles by changing their sort order.

1. 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 the *Service* section*,* select *Vehicles.*
   A list of existing vehicles appears.



Sort Order	Vehicle ID	Apparatus ID	Call Sign (EMS)	Station	Category	Status	Mileage	Sort
0	Tender 2	TND2		Station 1	Fire	Active		
0	Brush 1	BRSH1	Brush 1		EMS/Fire	Inactive		
0	Brush 8	abr8	abr8	Station 1	EMS/Fire	Active		
0	Utility 1	UTL1	Utility 1		EMS/Fire	Active		
0	Utility 4	UTL4	Utility 4		EMS/Fire	Active		
0	Command 1	COMD1	Command 1		EMS/Fire	Active		
0	Chief 1	FMFD1		Station 1	Fire	Active		
0	Fire Marshal	FM-05	FM City CH-05	Station 1	EMS/Fire	Active		
0	Fire Marshal 2	FM2			Fire	Active		
0	Station 1	STAN1	Station 1		EMS/Fire	Active		

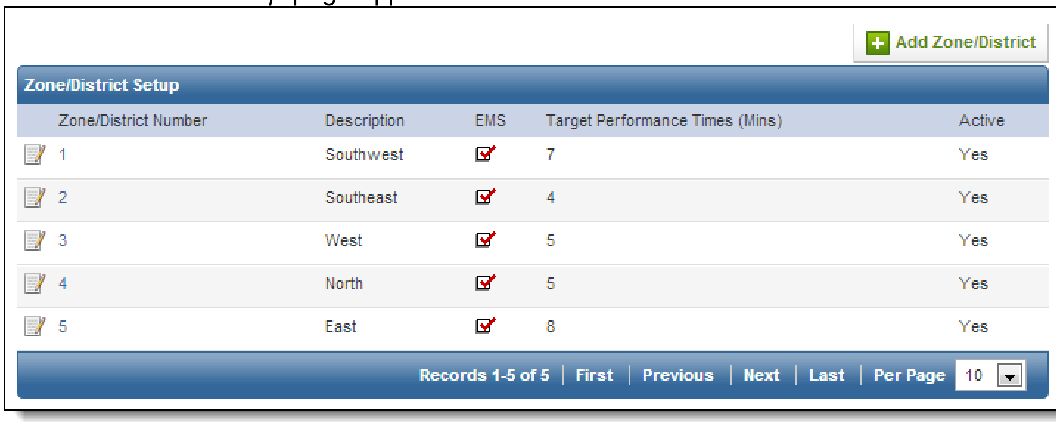
5. To move a vehicle up in the list of vehicles, click the *Up* arrow in the *Sort* column.
   The vehicle is moved up in the list.
6. To move a vehicle down in the list of vehicles, click the *Down* arrow in the *Sort* column.
   The vehicle is moved down in the list.

2.19 Working with Zones and 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. 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.



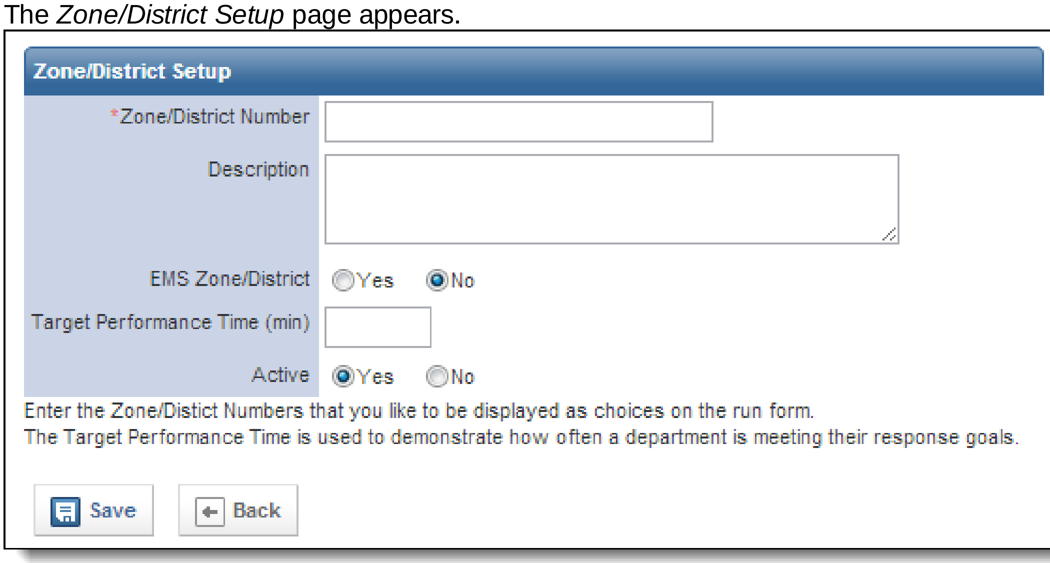
Add Zone/District

Zone/District Setup

Zone/District Number	Description	EMS	Target Performance Times (Mins)	Active
1	Southwest	☑	7	Yes
2	Southeast	☑	4	Yes
3	West	☑	5	Yes
4	North	☑	5	Yes
5	East	☑	8	Yes

Records 1-5 of 5 | First | Previous | Next | Last | Per Page 10

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

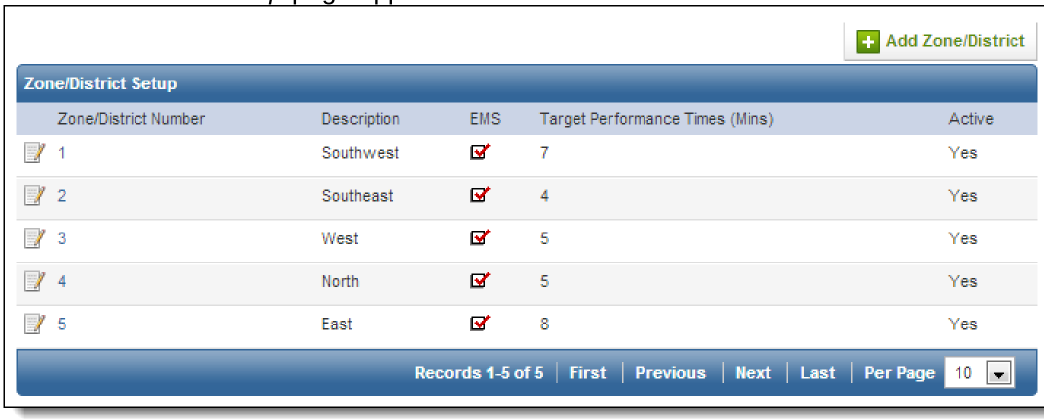


6. In the provided fields, enter information for the zone or district and the type of zone/district it is (e.g., fire or EMS).
7. When finished, click *OK.*
   The record is saved.

Editing a Zone or District Record

1. 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.



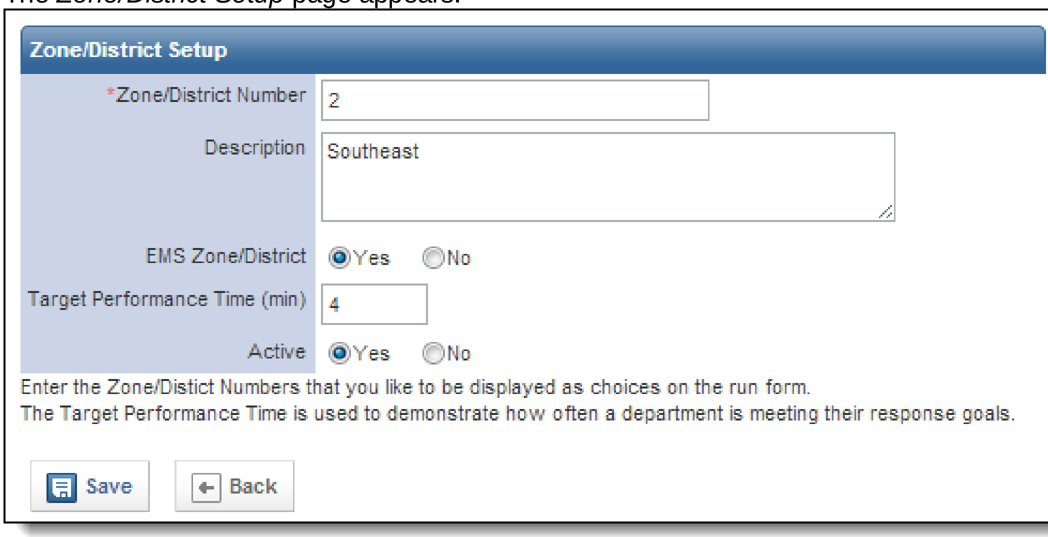
Add Zone/District

Zone/District Setup

	Zone/District Number	Description	EMS	Target Performance Times (Mins)	Active
	1	Southwest	☑	7	Yes
	2	Southeast	☑	4	Yes
	3	West	☑	5	Yes
	4	North	☑	5	Yes
	5	East	☑	8	Yes

Records 1-5 of 5 | First | Previous | Next | Last | Per Page 10

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



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

2.20 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*."

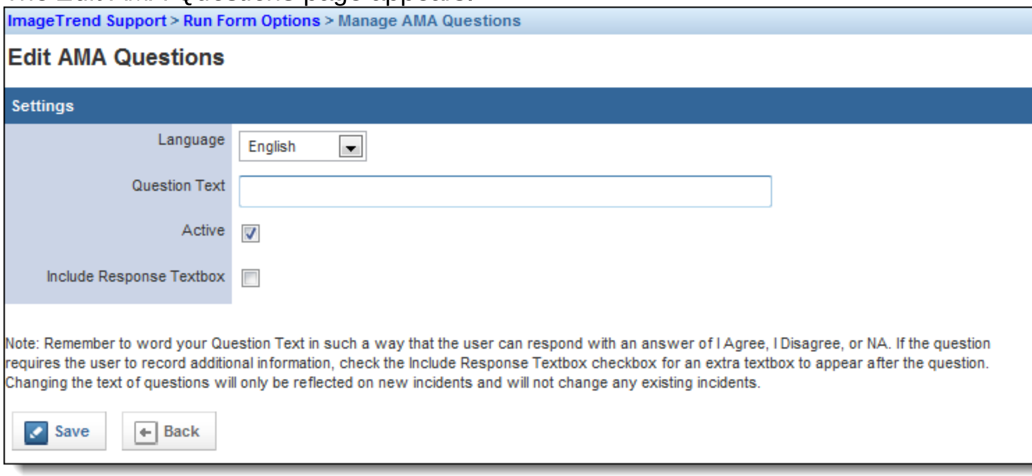
After you set up AMA questions you must also edit the dynamic run form to enable the questions to appear.

Adding an AMA Question

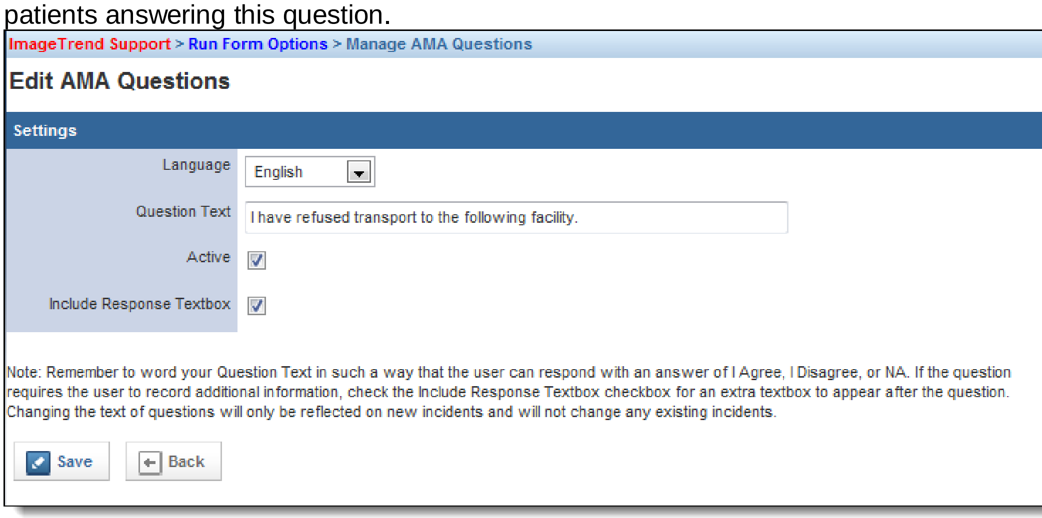
You can set up as many AMA questions as you would like.

1. 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 "I agree," "I disagree" or "N/A," 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.

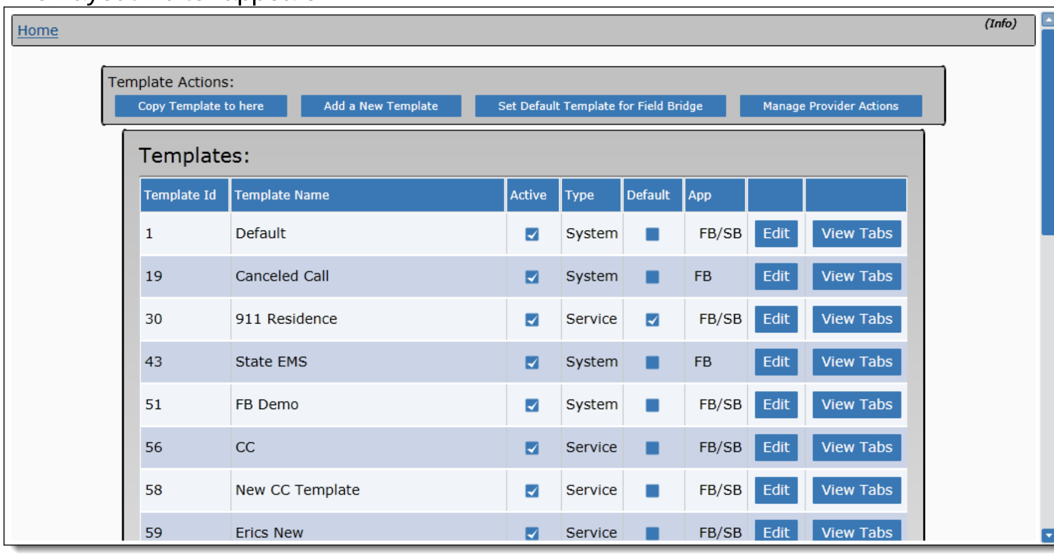


11. When finished, click *Save.*
    The question is added and will be displayed if the appropriate section is available on the run form.

Editing the Run Form for AMA Questions

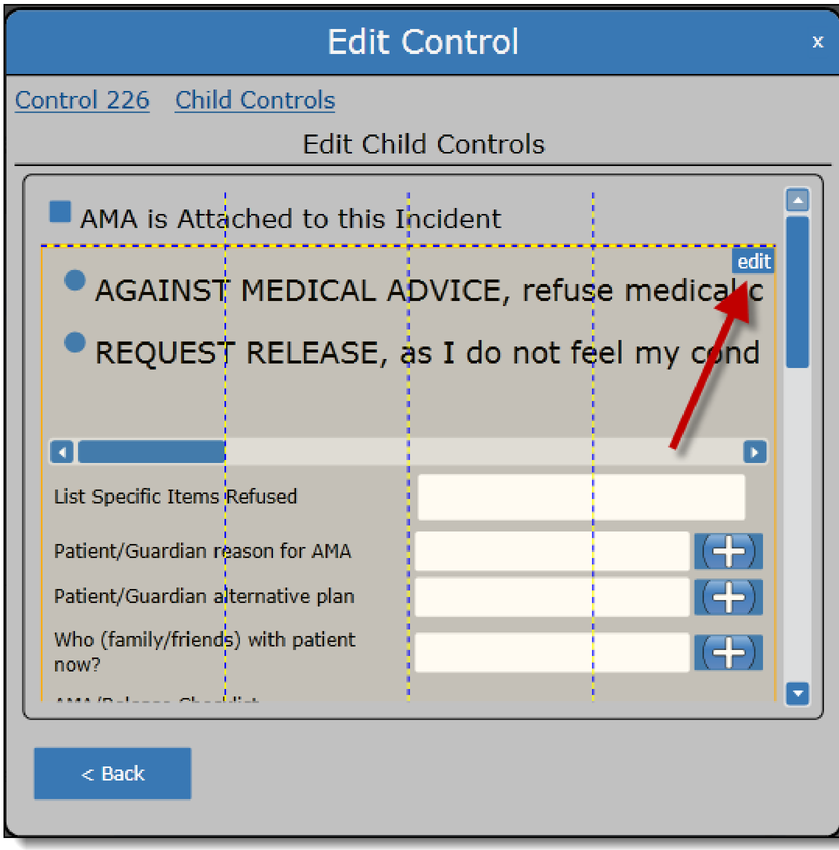
If you want to include AMA questions on your run form, you will need to add a new control to the run form.

1. 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.



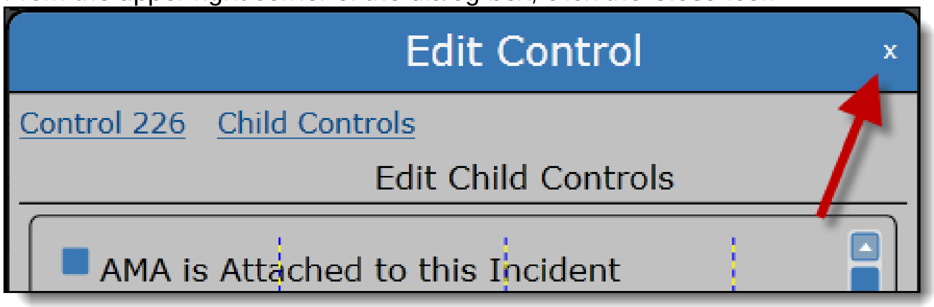
5. Locate the template you want to edit.
   HINT: It might be beneficial to begin with a copy of the template that you want to edit, if you are editing a template that is in use. This will ensure that providers are still working with an appropriate run form while you are working on it, as well as giving 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.



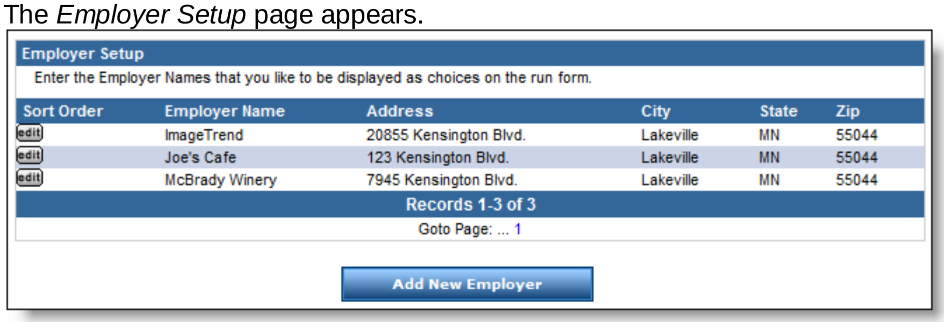
The changes are saved.

2.21 Working with Employers

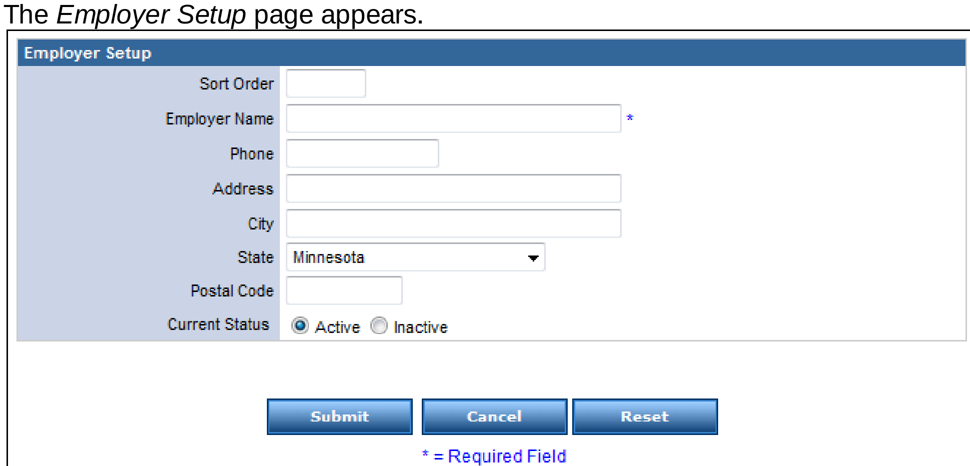
Employer records can be added or edited for selection from a run form.

Adding an Employer Record

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 *Employers.*
   The *Employer Setup* page appears.



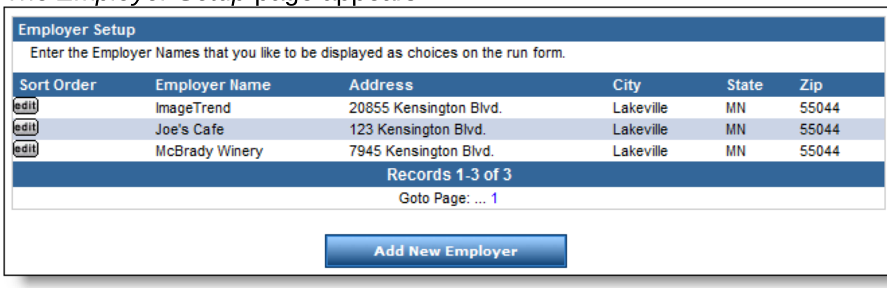
5. Click *Add New Employer.*
   The *Employer Setup* page appears.



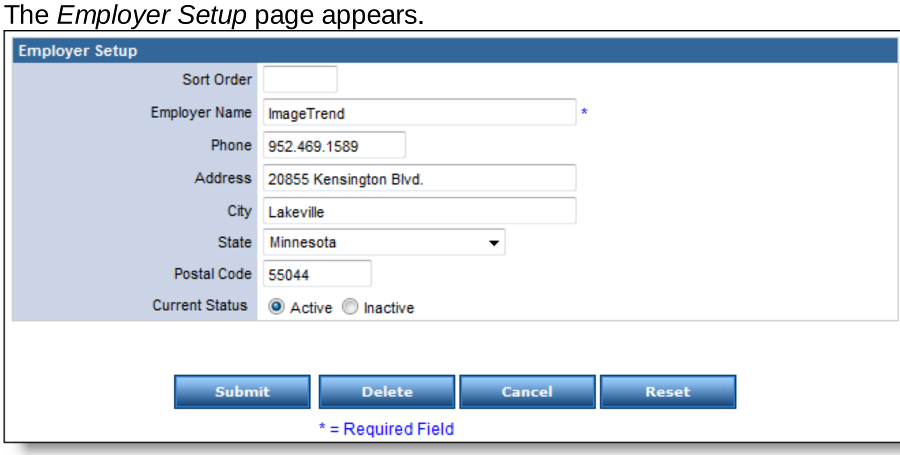
6. In the provided fields, enter the employer information.
7. When finished, click *Submit.*
   The employer record is saved.

Editing an Employer Record

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 *Employers.*
   The *Employer Setup* page appears.



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



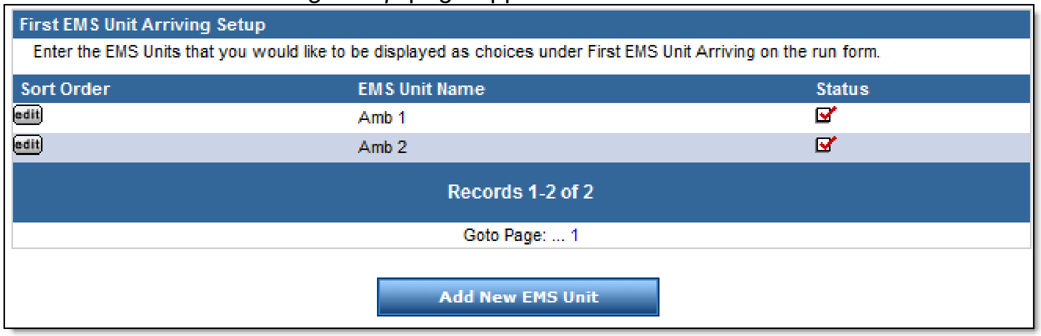
6. Using the provided fields, make any desired changes.
7. When finished, click *Submit.*

2.22 Setting Up First EMS Unit Arriving

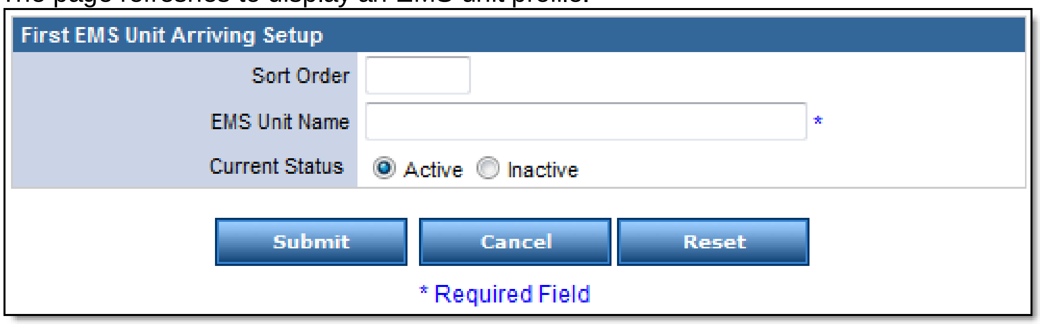
If you want to include a field on your run form for the first EMS units that arrives you can set up the values for that field here. (These values should be your own department's unit numbers.) This field will not be included in your run form automatically; you will need to add it in the run form editor.

1. 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.



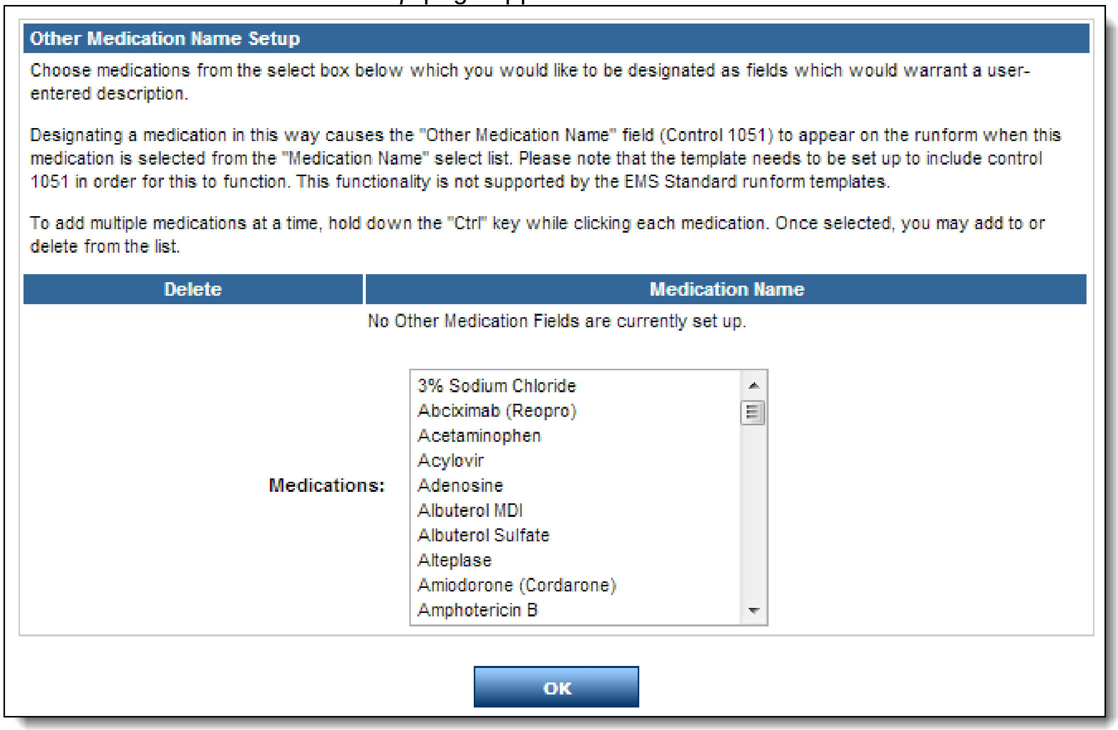
6. **OPTIONAL:** To assign this EMS unit to a particular order in the list of EMS units, in the *Sort Order* text box, type a number corresponding to this unit's order (e.g., 1 for first).
7. In the *EMS Unit Name* text box, type a name for this EMS unit.
8. In the *Current Status* section, to mark this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

2.23 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. 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.



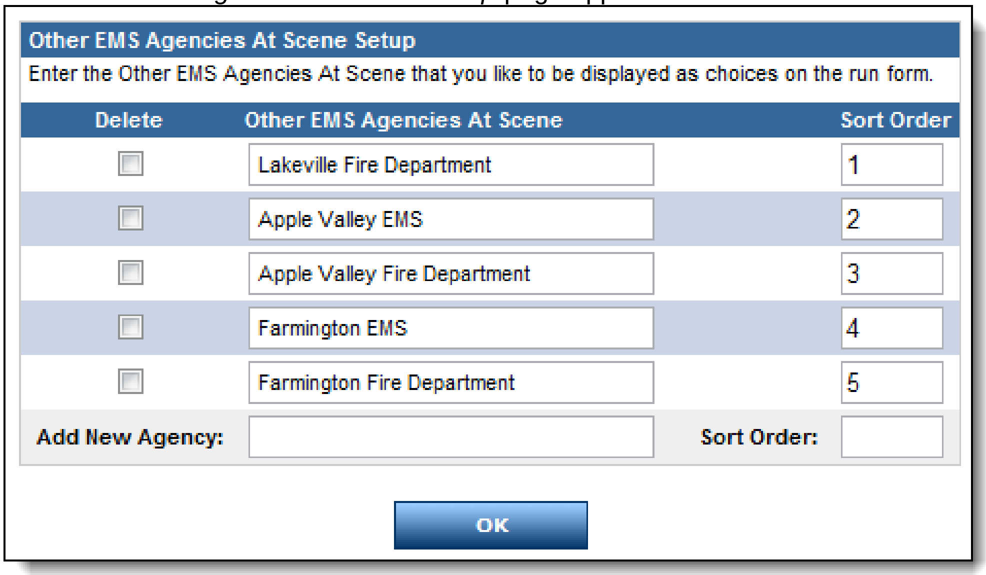
5. In the *Medications* list, select the medication(s) that should cause the *Other Medication Name* field to appear.
   HINT: To select multiple options at the same time, press and hold the *Ctrl* key while clicking each desired option.
6. Click *OK.*
   The medications are added to the list.
7. Repeat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

2.24 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.

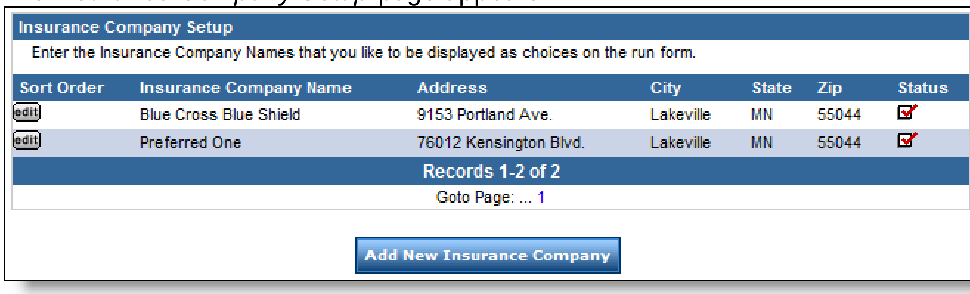
2.25 Working with Insurance Companies

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

Adding an Insurance Company Record

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 *Insurance Companies.*
   The *Insurance Company Setup* page appears.



Insurance Company Setup

Enter the Insurance Company Names that you like to be displayed as choices on the run form.

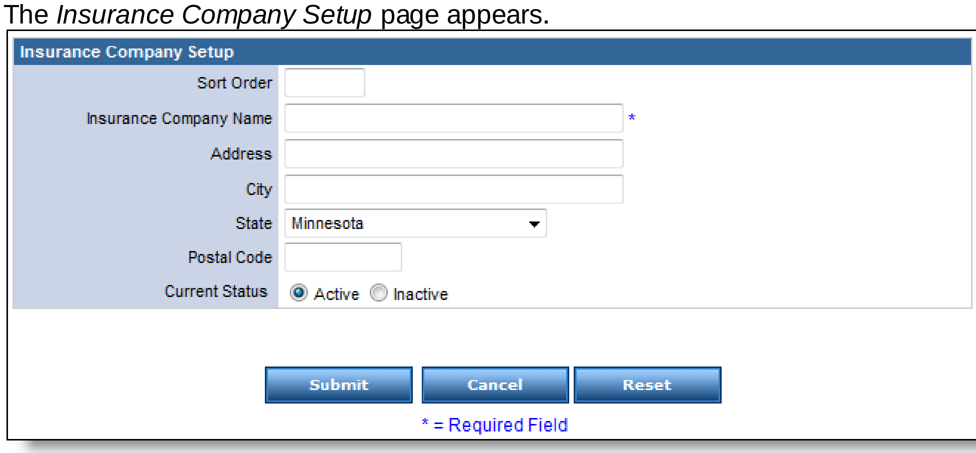
Sort Order	Insurance Company Name	Address	City	State	Zip	Status
edit	Blue Cross Blue Shield	9153 Portland Ave.	Lakeville	MN	55044	
edit	Preferred One	76012 Kensington Blvd.	Lakeville	MN	55044	

Records 1-2 of 2

Goto Page: ... 1

Add New Insurance Company

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



Insurance Company Setup

Sort Order

Insurance Company Name *

Address

City

State Minnesota

Postal Code

Current Status Active Inactive

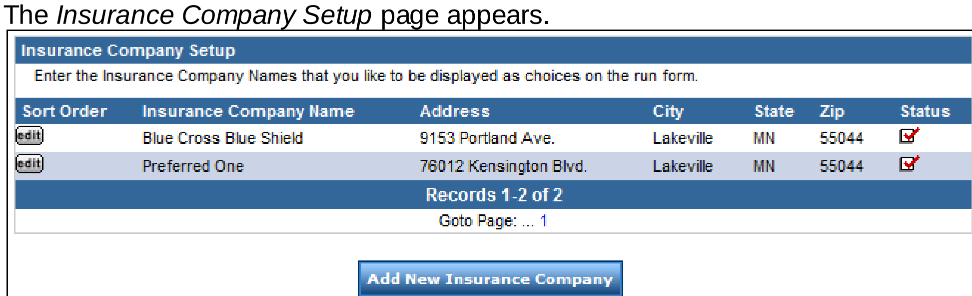
Submit Cancel Reset

* = Required Field

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. 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.



Insurance Company Setup

Enter the Insurance Company Names that you like to be displayed as choices on the run form.

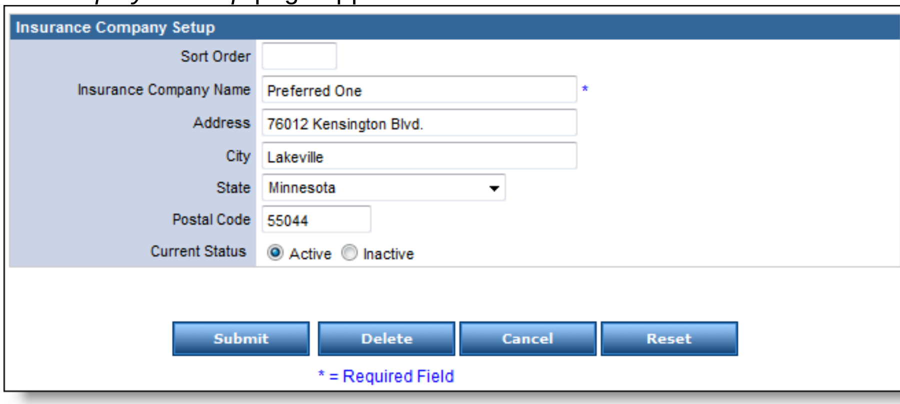
Sort Order	Insurance Company Name	Address	City	State	Zip	Status
edit	Blue Cross Blue Shield	9153 Portland Ave.	Lakeville	MN	55044	
edit	Preferred One	76012 Kensington Blvd.	Lakeville	MN	55044	

Records 1-2 of 2

Goto Page: ... 1

Add New Insurance Company

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

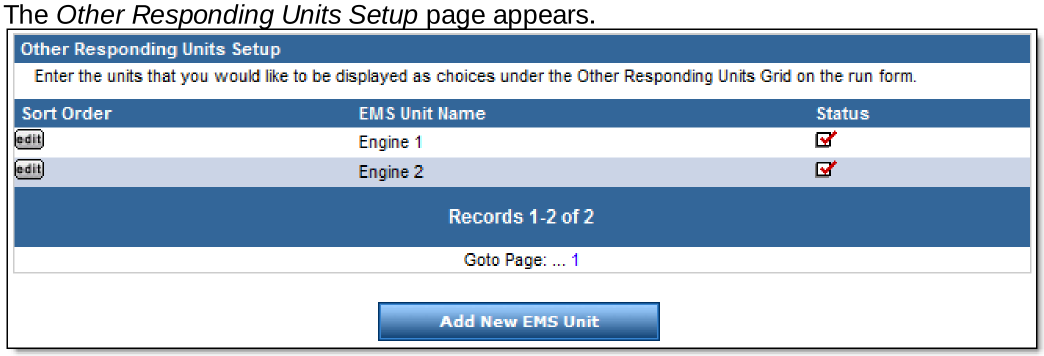


6. Using the provided fields, make any desired changes.
7. When finished, click *Submit.*

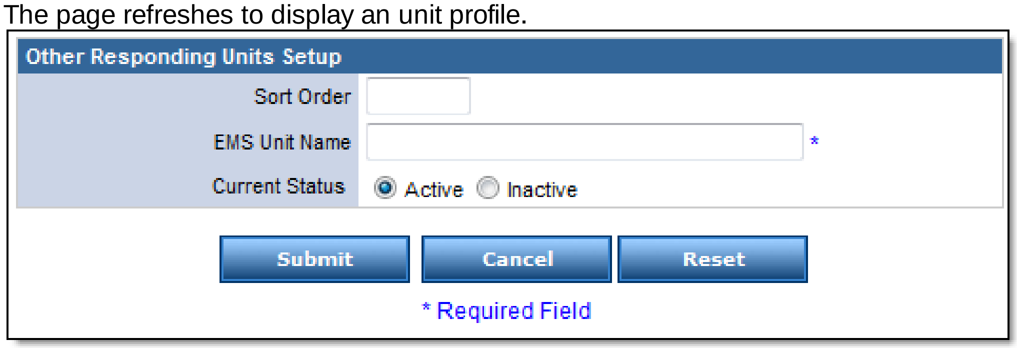
2.26 Setting Up Other Responding Units

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. 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.

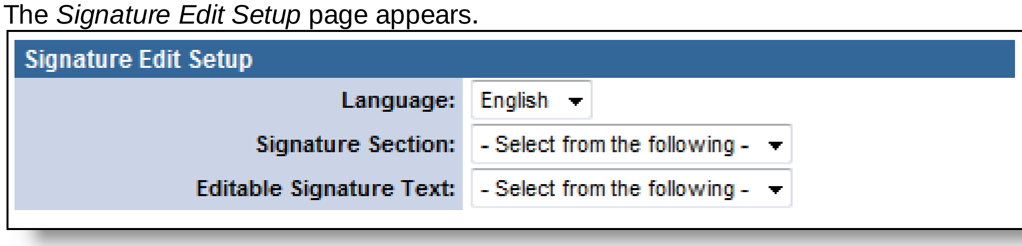


6. **OPTIONAL:** To assign this unit to a particular order in the list of units, in the *Sort Order* text box, type a number corresponding to this unit's order (e.g., 1 for first).
7. In the *EMS Unit Name* text box, type a name for this unit.
8. In the *Current Status* section, to mark this unit as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

2.27 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. 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.



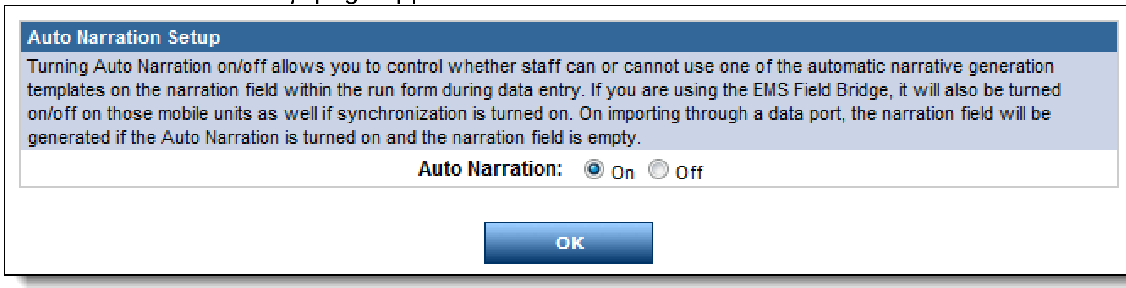
6. Using the drop down menus, select the consent text you would like to edit.
   A preview of the existing consent text appears.
7. Click *Edit.*
   The consent text becomes editable.
8. Make any desired changes.
   OR
   To return edited consent text to the system default text, in the *Set signature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

2.28 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.



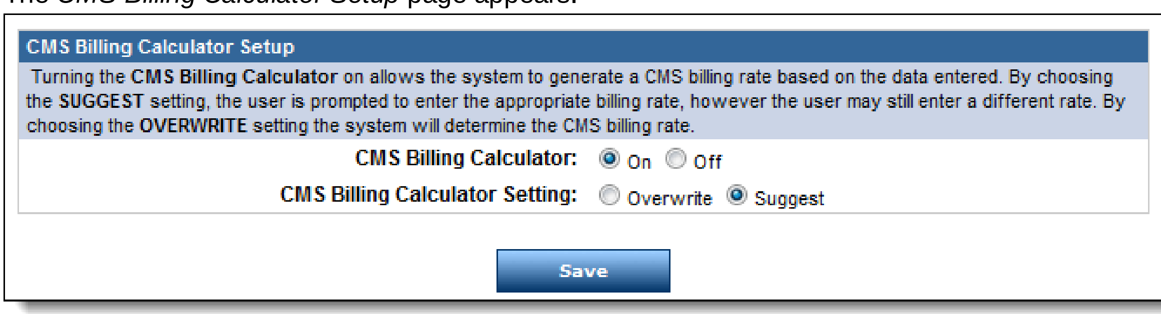
5. To enable automatic narrative generation, select *On.*
   OR
   To prevent automatic narratives from being generated, select *Off.*
6. Click *OK.*
   The setting is saved.

2.29 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.

This option may or may not be available to you, based on the system setup by the state.

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 *CMS Billing Calculator.*
   The *CMS Billing Calculator Setup* page appears.



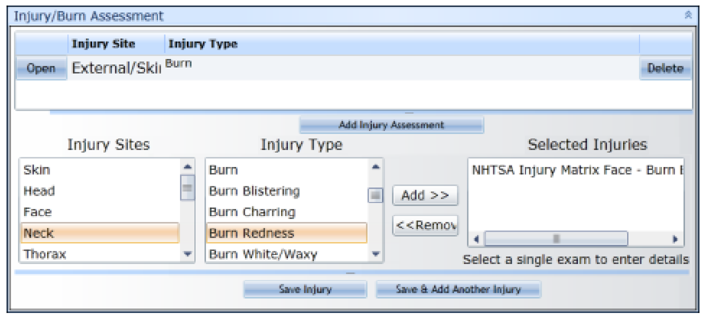
5. To enable the CMS Billing Calculator, select *On.*
   OR
   To prevent the CMS Billing Calculator from providing a billing rate, select *Off.*
6. If the CMS Billing Calculator is enabled, select whether the calculated rate should be changeable by the provider filling out the run form (*Suggest*) or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

2.30 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.

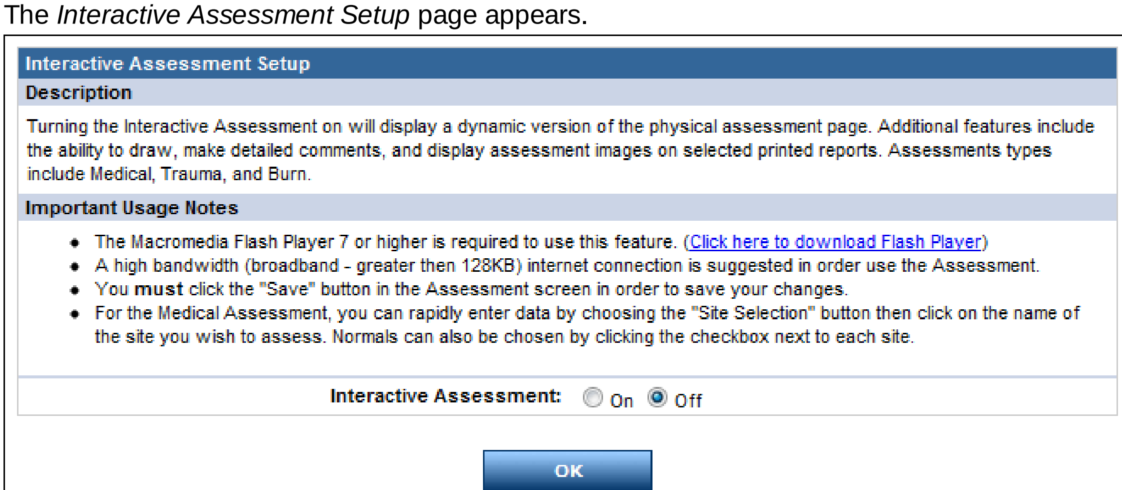
If the interactive physical assessment is enabled, providers will be able to work with an interactive physical image to enter medical and injury assessments. If the interactive physical assessment is not enabled, providers will work with a collection of fields similar to the rest of the run form to enter 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. 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 *Interactive Physical Assessment.*
   The *Interactive Assessment Setup* page appears.

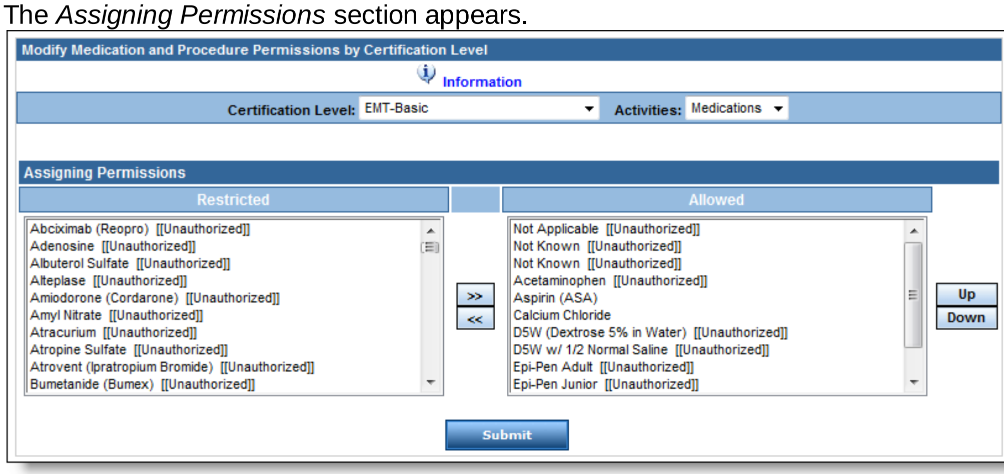


5. To enable the interactive physical assessment, select *On.*
   OR
   To disable to interactive physical assessment, select *Off.*
6. When finished, click *OK.*
   The changes are applied.

2.31 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. 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.



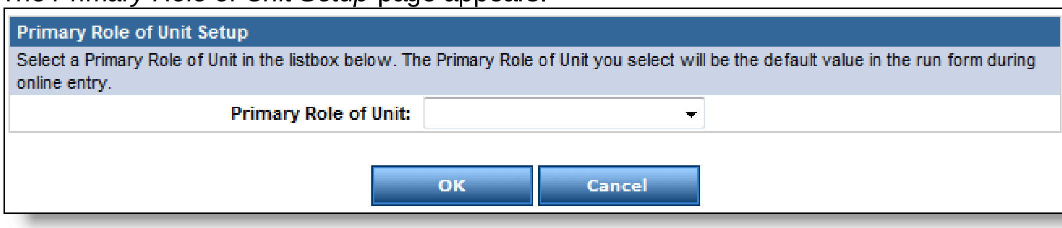
7. To add an activity to the allowed activities for the certification level,
   a. From the *Restricted* list, select the desired activity.
      HINT: To select multiple activities, press and hold *Ctrl* while clicking each desired activity. To select a range of activities, press and hold *Shift* while 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.

2.32 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 run forms.

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 *Primary Role of Unit.*
   The *Primary Role of Unit Setup* page appears.

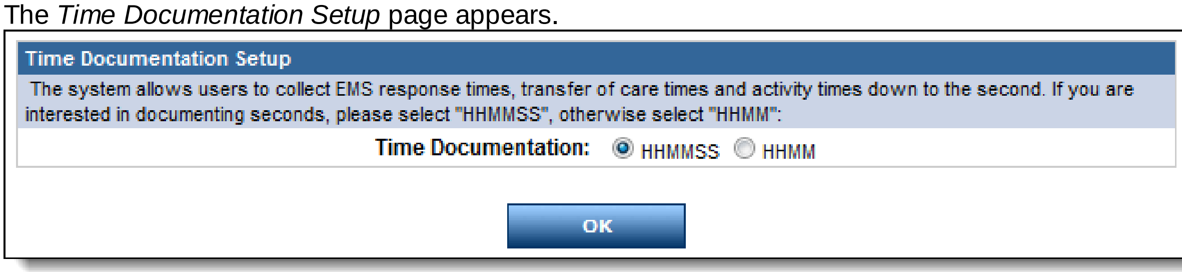


5. From the *Primary Role of Unit* drop down menu, select the desired default role.
6. Click *OK.*

2.33 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.



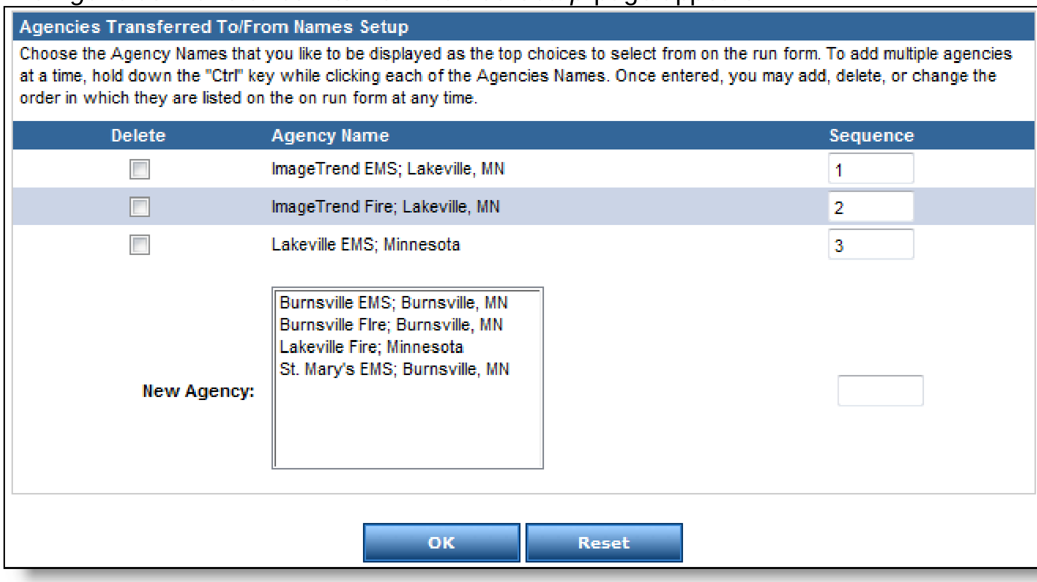
5. Select the desired time format.
6. Click *OK.*
   The format is saved.

2.34 Sorting Transferring Agencies

The agencies that your service could transfer patients to or from that will be available to add to run forms are set up by state administrators. 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. 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 *Agency Transfer/Transport.*
   The *Agencies Transferred To/From Names Setup* page appears.



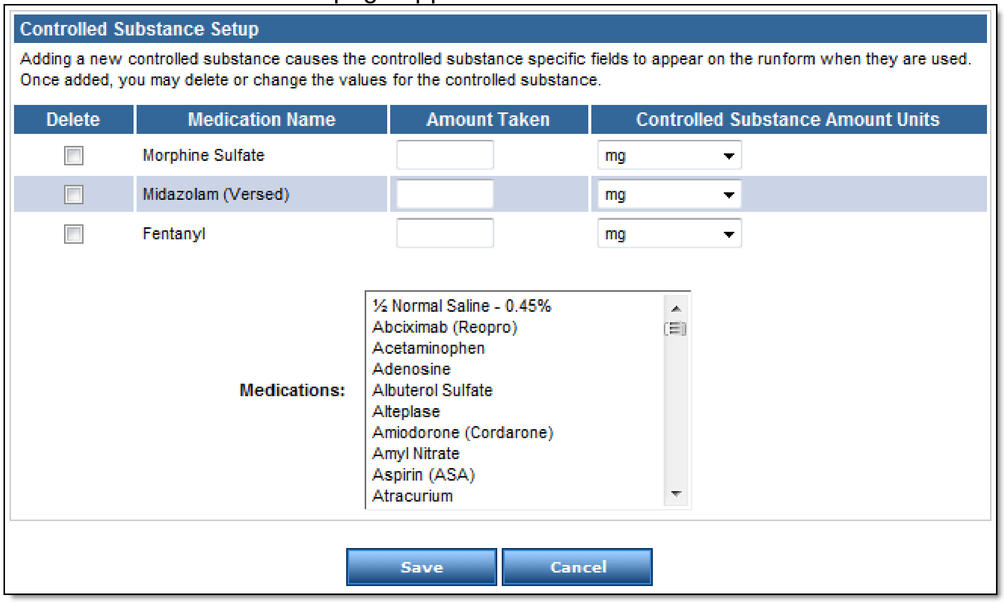
5. To add an agency to the list, from the *New Agency* section, click the agency to add.
6. Click *OK.*
7. To remove a agency from the list, from the list of agencies at the top of the page, select the desired *Delete* checkbox.
8. Click *OK.*
9. To re-order agencies, in the *Sequence* text boxes, type 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.*

2.35 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. 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.



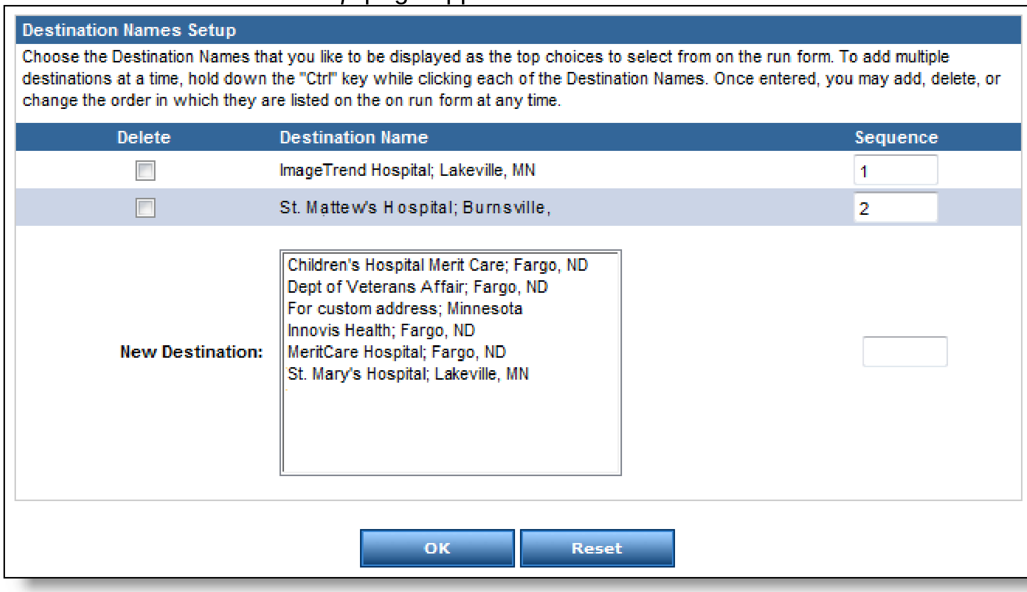
5. To add a substance to the list, from the *Medications* section, click the medication to add.
6. Click *Save.*
   The medication is added.
7. To enter the default dosage that will appear on the grid when this medication is selected, in the *Amount Taken* and *Controlled Substance Amount Units* sections, 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.*

2.36 Sorting 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. The full list of destinations available here is set up by state administrators.

1. 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.*

2.37 Setting Up Dynamic Run Form Options

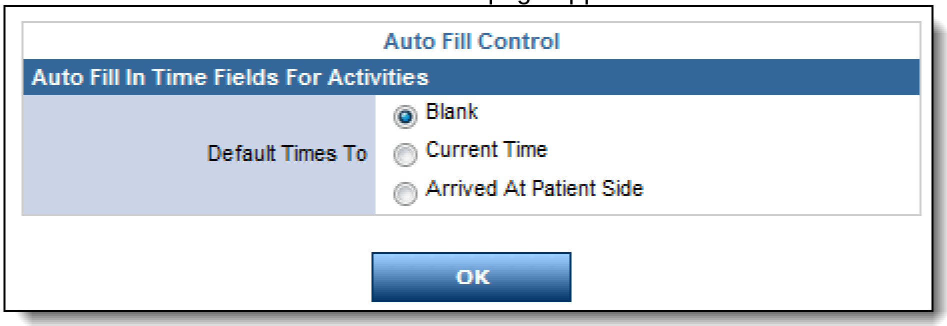
When using the dynamic run form, there are several options that you can set up that will apply to all dynamic run form templates that your agency uses.

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, 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.

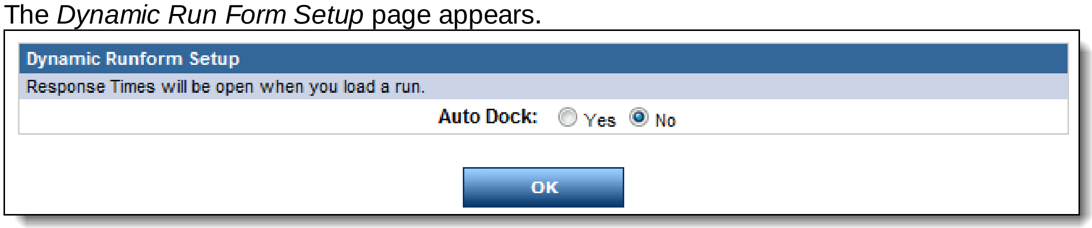


5. In the *Default Times To* section, select the option that times should be automatically set to for new activity records added to any dynamic run form template.
6. Click *OK.*
   The setting is saved.

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, 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.



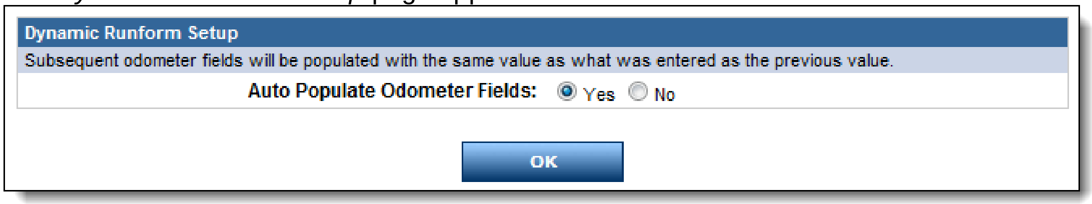
5. To display the *Response Times* panel whenever a dynamic run form is opened, select *Yes.*
6. Click *OK.*
   The setting is saved.

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, 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.

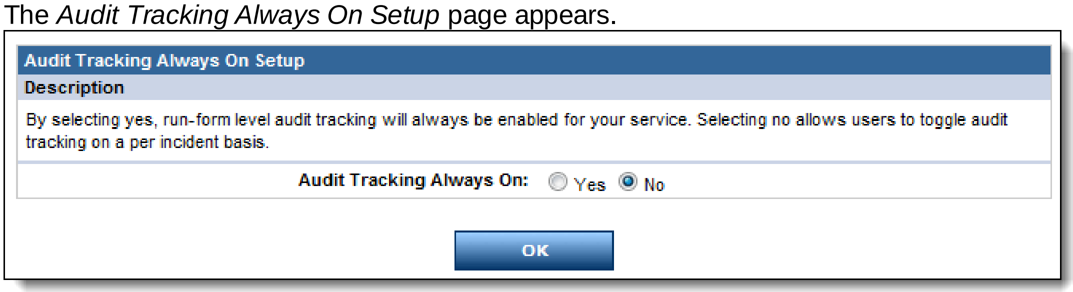


5. To automatically enter the first odometer field in all subsequent odometer fields, select *Yes.*
6. Click *OK.*
   The setting is saved.

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.

1. From the top left, 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.



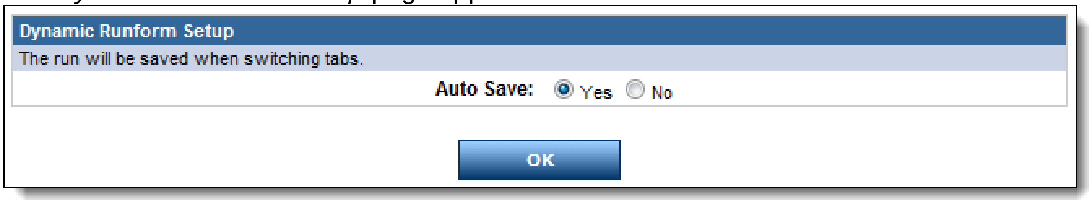
5. To ensure that incident audit tracking is always used, select *Yes.*
   OR
   To allow incident audit tracking to be determined by incident, select *No.*
6. Click *OK.*
   The settings are saved.

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, 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.

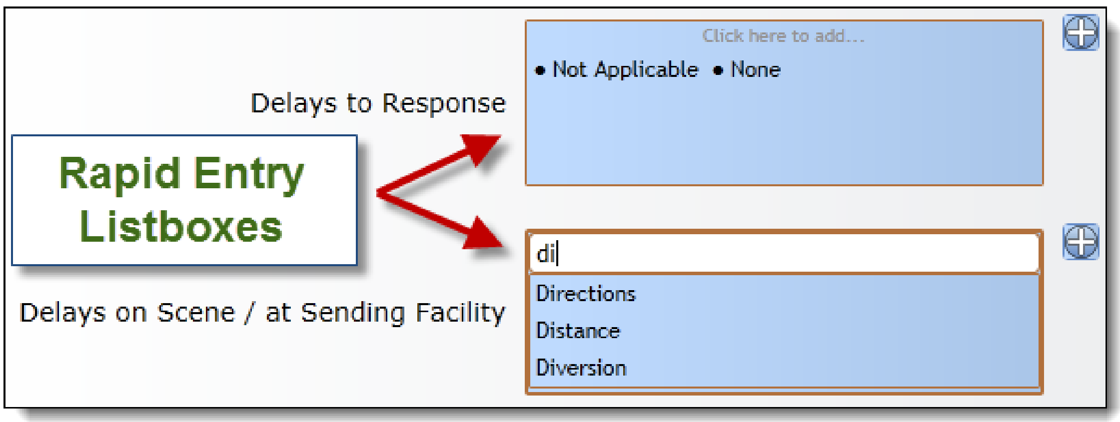


5. To enable automatic saving whenever a user switches tabs, click *Yes.*
6. Click *OK.*
   The setting is saved.

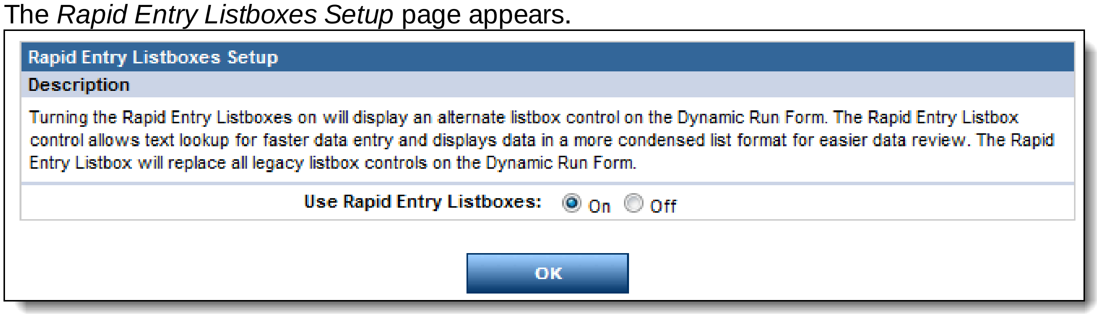
Enabling Rapid Entry Listboxes

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, 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.

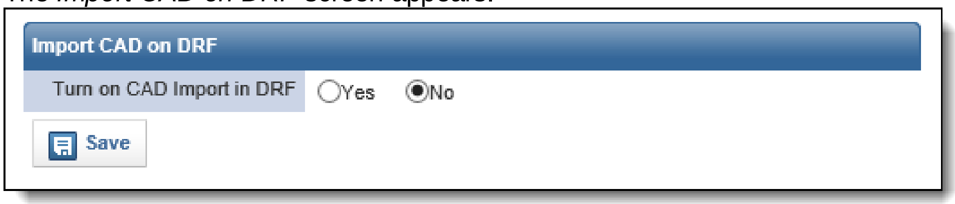


5. To enable rapid entry listboxes, select *On.*
6. Click *OK.*
   The setting is applied.

Adding the Get CAD Info Button

Providers can quickly pull information from CAD into their dynamic run forms with the *Get CAD* button. Administrators can make this button visible on the run forms. CAD integration is required in order to utilize this feature.

1. From the top left, click *My Service*.
2. Select the *Setup* tab.
3. Under the *Run Forms* section, select *Dynamic Run Form*.
   A sub-menu appears.
4. Select *CAD Button Visibility.*
   The *Import CAD on DRF* screen appears.



5. To have the *Get CAD Info* button visible on dynamic run forms, set to *Yes*.
   Click *Save*.

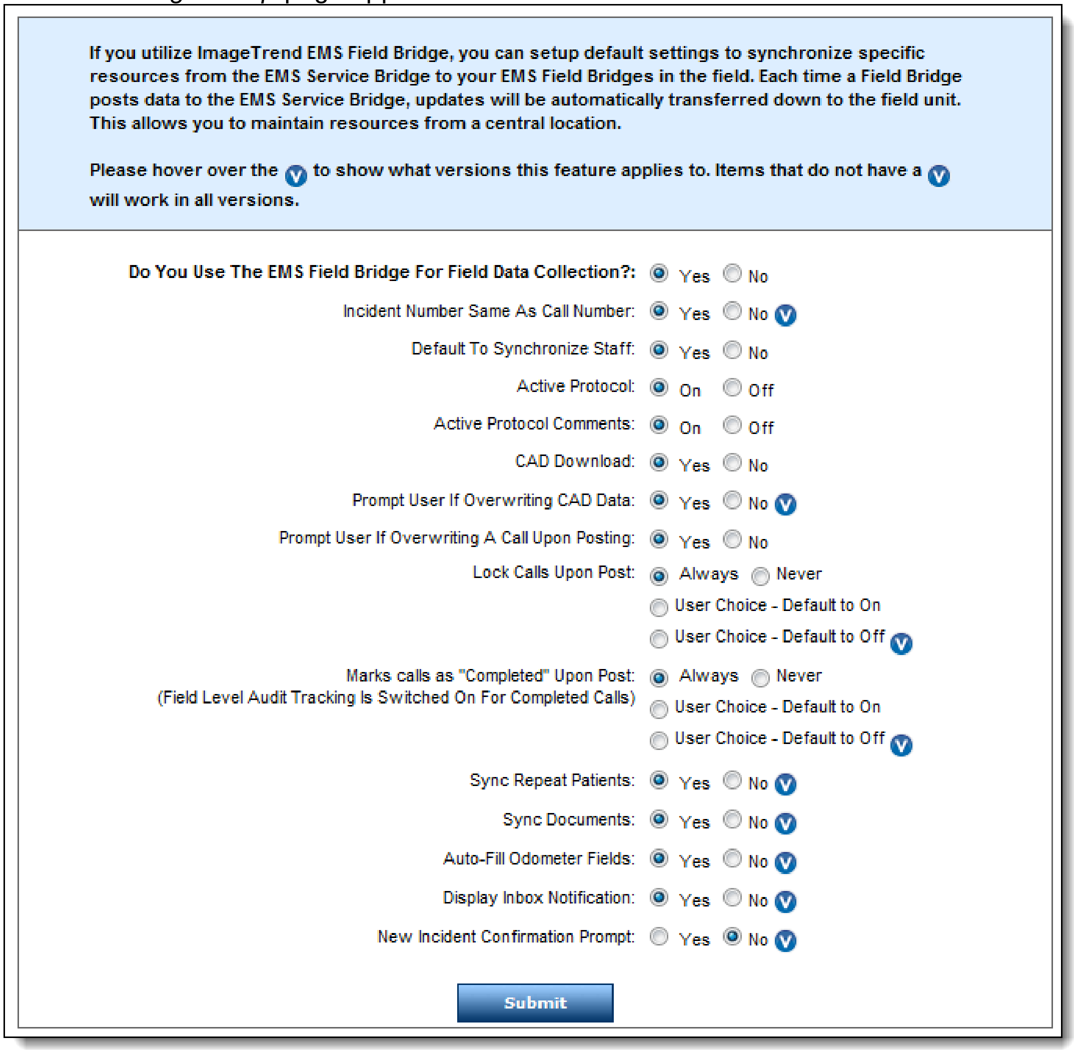
2.38 Setting Up Field Bridge Options

Services that are using the EMS Field Bridge in addition to the EMS State Bridge can set information to flow between the two applications. 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 State Bridge database for central access. Administrators can set these options for information sharing.

To change the Field Bridge integration options:

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

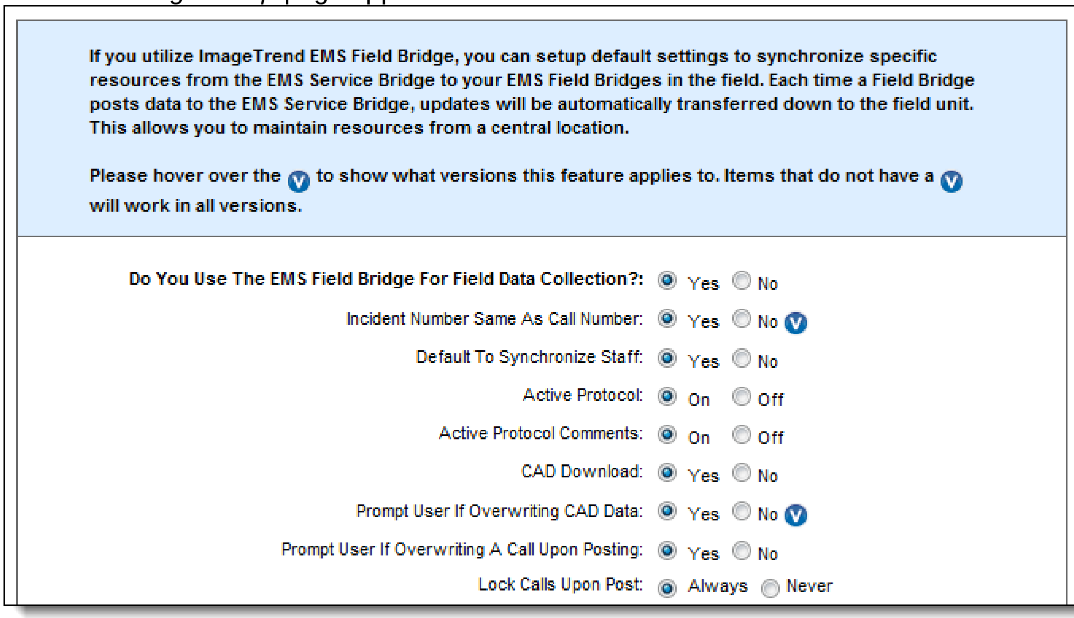
12. To set run locking options for calls that are posted, in the *Lock Calls Upon Post* section, select the desired option.
    HINT: In order for this option to work, your Field Bridge must be updated to at least version 5.3.
13. To set options for marking calls as completed when they are posted from 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 State 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 State 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.

Forcing Field Bridge Syncing

If you have made major changes to the Field Bridge settings or for any other reason want to force the Field Bridge systems connected to your State Bridge to sync the next time they post data, you can choose to do so.

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



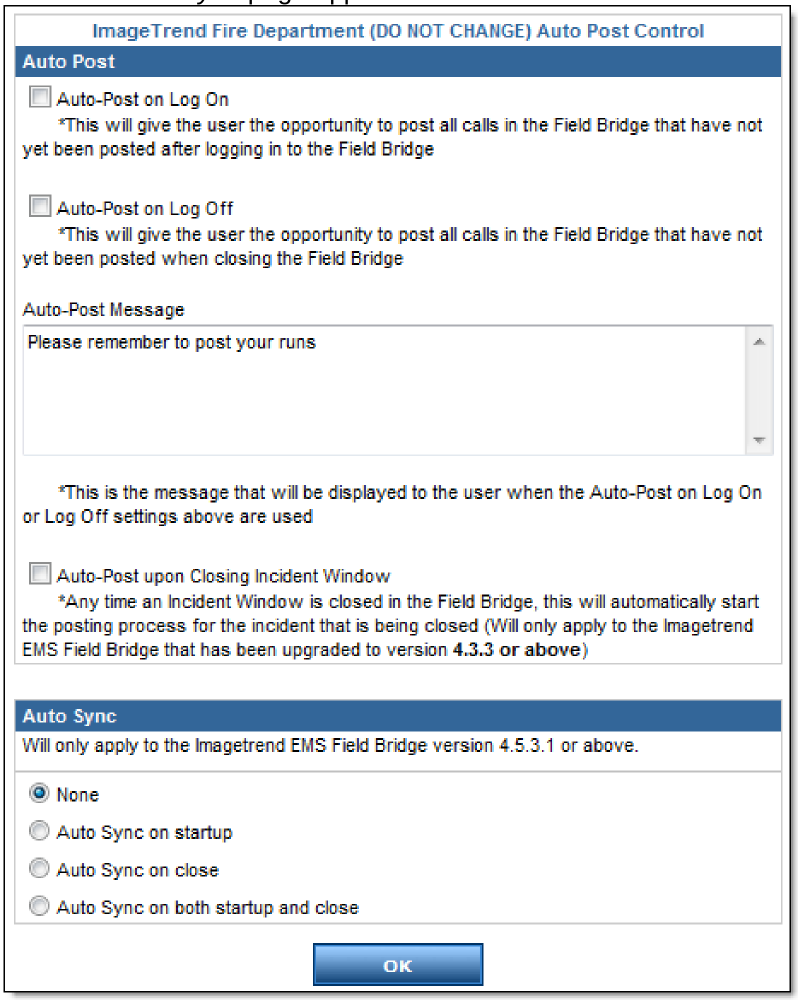
5. From the bottom of the page, click *Force Re-Sync for Version 4.X and 5.X.*
   All Field Bridge systems will download all resources the next time they sync.

Configuring Automatic Posting and Syncing

Administrators can create a message that will prompt users to post runs or sync the Field Bridge and select when the message(s) will appear.

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



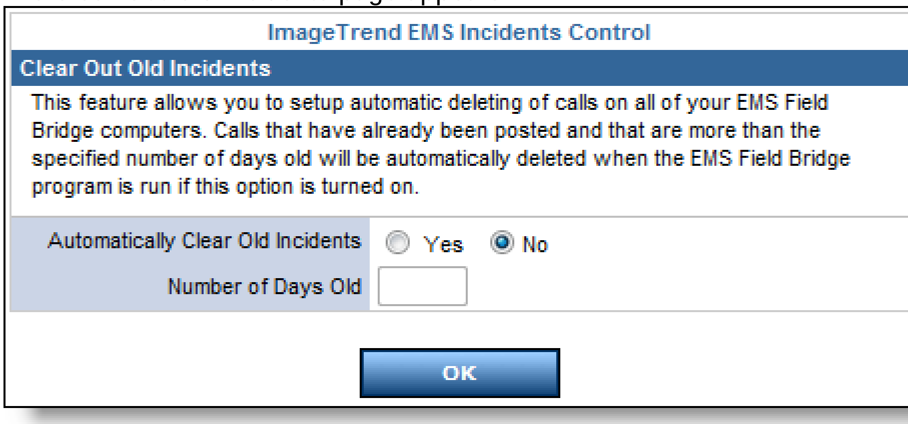
5. To create a pop up window that will prompt users to post runs, select the *Auto-Post on Log On, Auto-Post on Log Off* or *Auto-Post upon Closing Incident Window* checkboxes.
   HINT: The option that is selected will determine when the pop up window will appear.
   NOTE: All three options can be selected 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.*

Configuring Incident Clearing

You can use your State Bridge 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 State Bridge system.

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

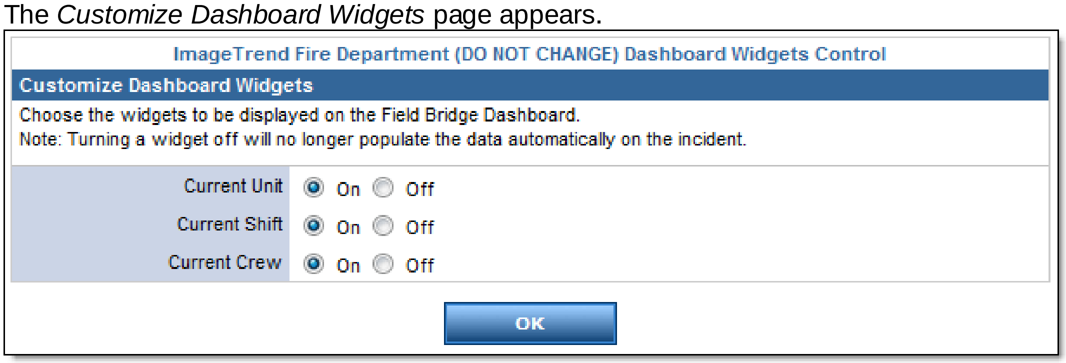


5. To automatically delete old incidents, in the *Automatically Clear Old Incidents* section, select *Yes.*
6. To select the number of days an incident report should be saved before deleting it from the system, in the *Number of Days Old* section, type the desired number of days.
7. Click *OK.*
   The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

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. From the top left, click *My Service.*
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.*
   HINT: If you choose to display the *Current Unit* widget, you can also choose whether the *Unit Number* and *Call Sign* values should have lookup buttons. If you select *Off*, a single lookup button will appear and users can select an option where the unit and call

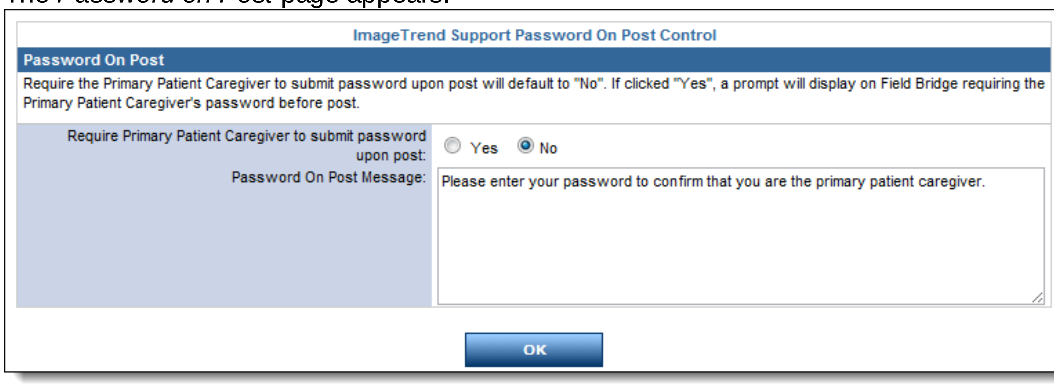
sign are automatically combined. If you select *On,* two lookup buttons will appear and users can select the unit number and call sign separately.

7. When finished, click *OK.*

Requiring Passwords for Posting

You can set the Field Bridge to require the primary patient caregiver(s) from each incident to enter their passwords before the incident is posted.

1. From the top left, click *My Service.*
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 a password from the primary patient caregiver for a run to be posted, select *Yes.*
6. If you required a password, in the *Password on Post Message* text box, type the message that should appear when the prompt for the password appears.
7. When finished, click *OK.*
   The settings are saved and will be applied once each Field Bridge system syncs.

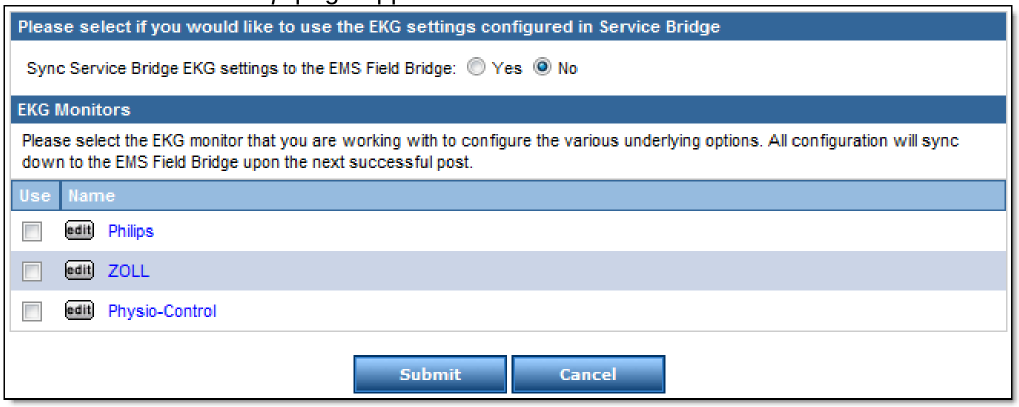
Controlling EKG Monitor Setup

If your service uses EKG monitors with the Field Bridge, you can control some setup options on the State Bridge. 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. From the top left, click *My Service.*
2. Select the *Setup* tab.
3. Under the *Field Bridge* section, select *Preferences.*
   A sub-menu appears.

4. Under *Preferences,* click *EKG Monitor.*
   The *EKG Monitor Setup* page appears.



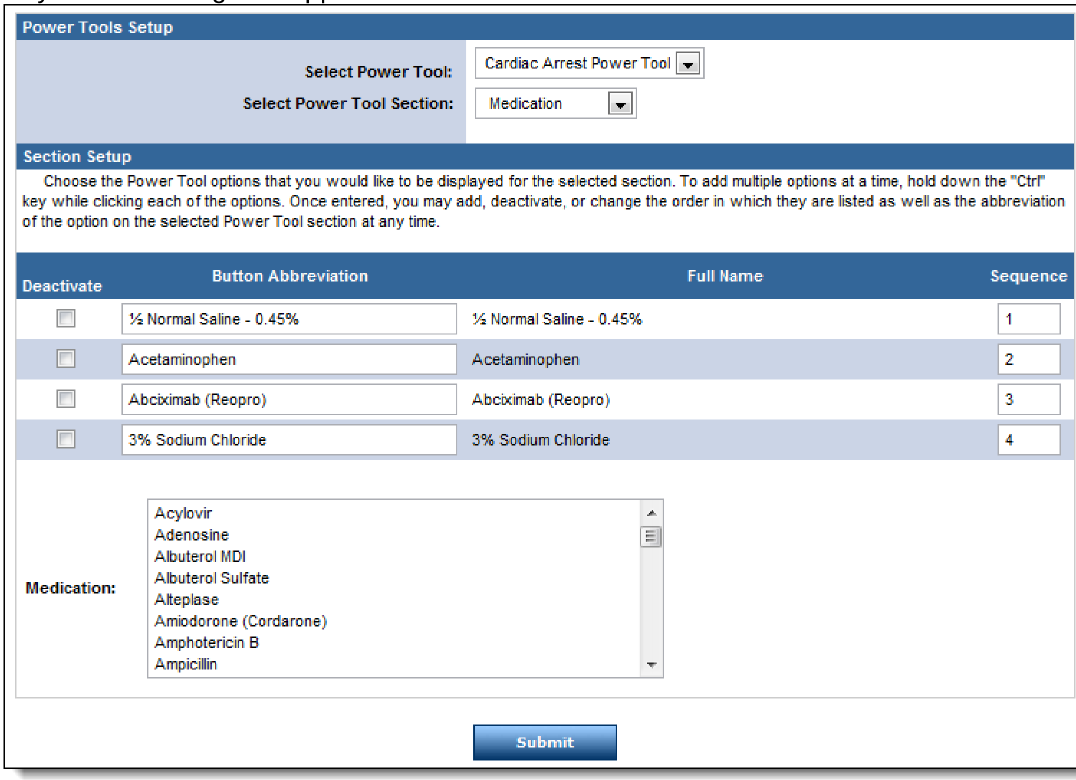
5. Click the name of the type of monitor you want to set up.
6. Configure the settings you want to be applied to all Field Bridge systems.
   NOTE: For more information about these settings, please refer to the setup guide for that type of EKG monitor and the Field Bridge.
7. When finished, click *Submit.*
   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.*
11. From the top of the page, in the *Sync Service Bridge EKG settings to the Field Bridge* section, select *Yes.*
12. Click *Submit*.
    The settings will be copied to all Field Bridge systems when they sync.

Setting Up Power Tool Options

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



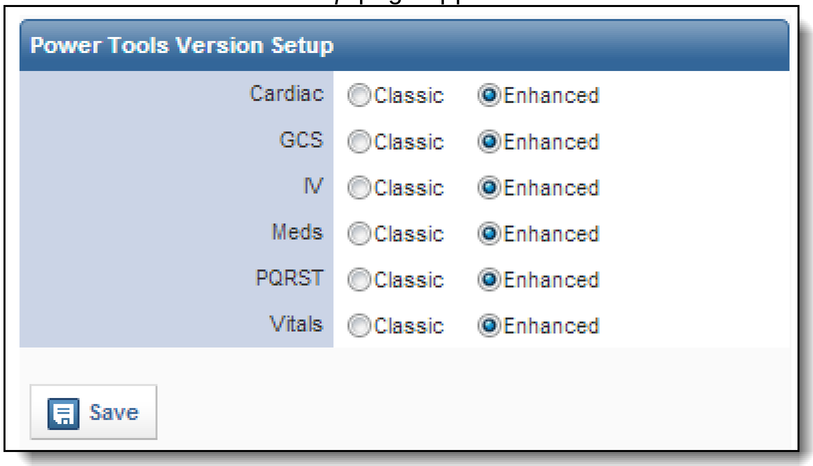
7. To add a new option, from the *Options* scroll list, select the first option to be available and click *Submit.*
8. To change the name that will appear in the list, in the *Button Abbreviation* text box, type the new name.
9. To change the order in which the item will appear, in the *Sequence* text 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.*

Setting Up 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. From the top left, click *My Service.*
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.

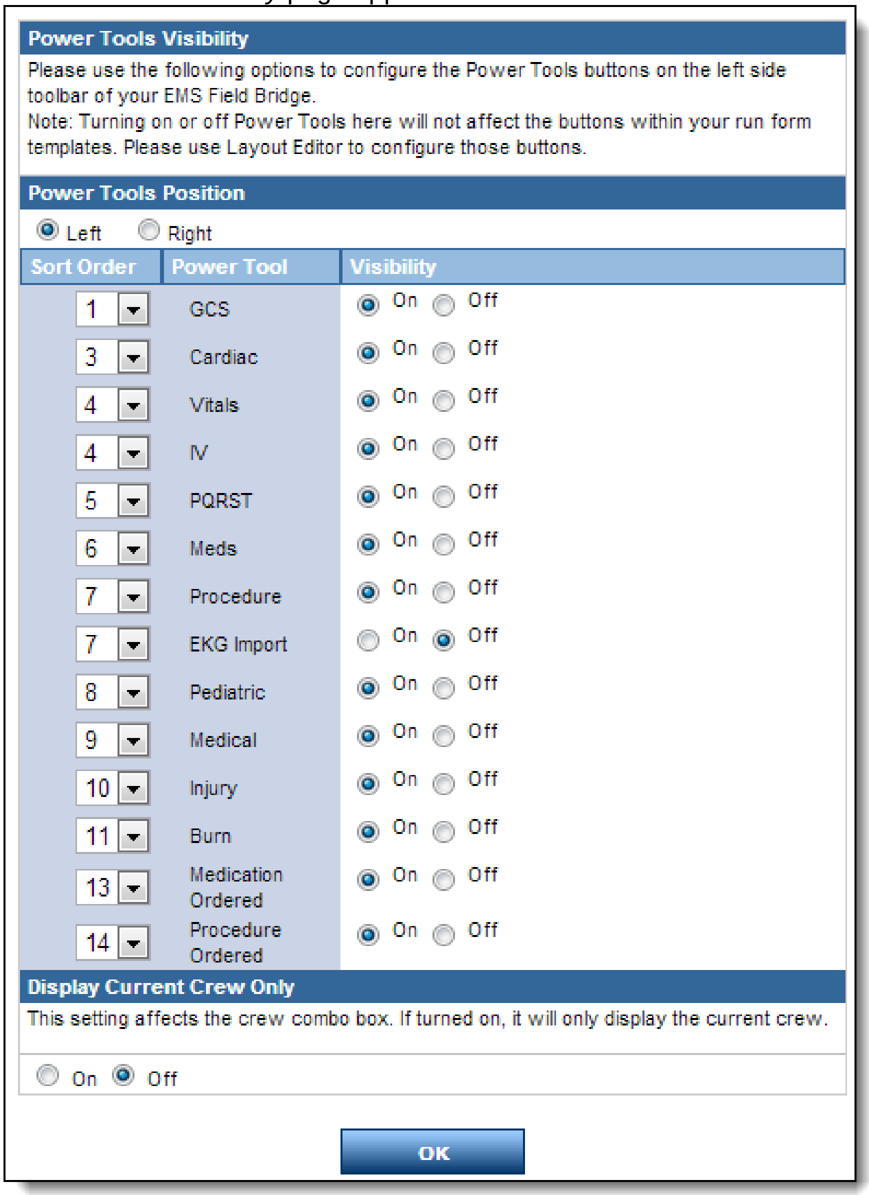
Setting Power Tool Display Options

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



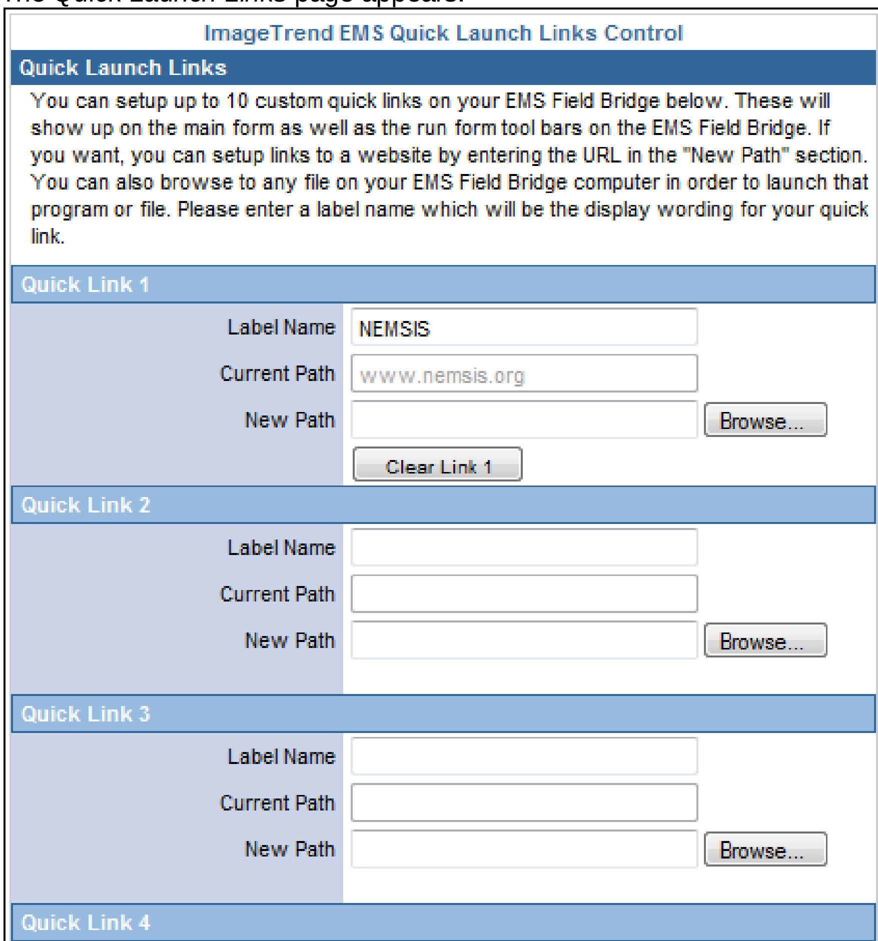
5. From the *Power Tools Position* section, select where the toolbar should appear.
   HINT: If you choose to leave the toolbar on the left, it will always be displayed on the left. If you choose to place it on the right, it will add a *Power Tools* button to the right toolbar, which will display the 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. To restrict the crew members available in each power tool to those who are selected as the current crew, in the *Display Current Crew Only* section, select *On.*
   HINT: This can be useful if your agency has a lot of providers and power tools are loading slowly due to the need to pull in so many crew member names. However, this is unusual. Most of the time this setting does not need to be set to *On.*
9. When finished, click *Save.*

Configuring Quick Launch Links

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

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.

State Bridge controls the reports and narratives that are available for both the State Bridge system and the Field Bridge system. The reports and narratives available for State Bridge are by default applied to the Field Bridge list, although that list can be changed. State administrators will set up the reports and narratives for State Bridge in the *Administration* section.

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 Field Bridge, you can deactivate them using State Bridge. State administrators will set up the reports and narratives for State Bridge in the *Admin* section.

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

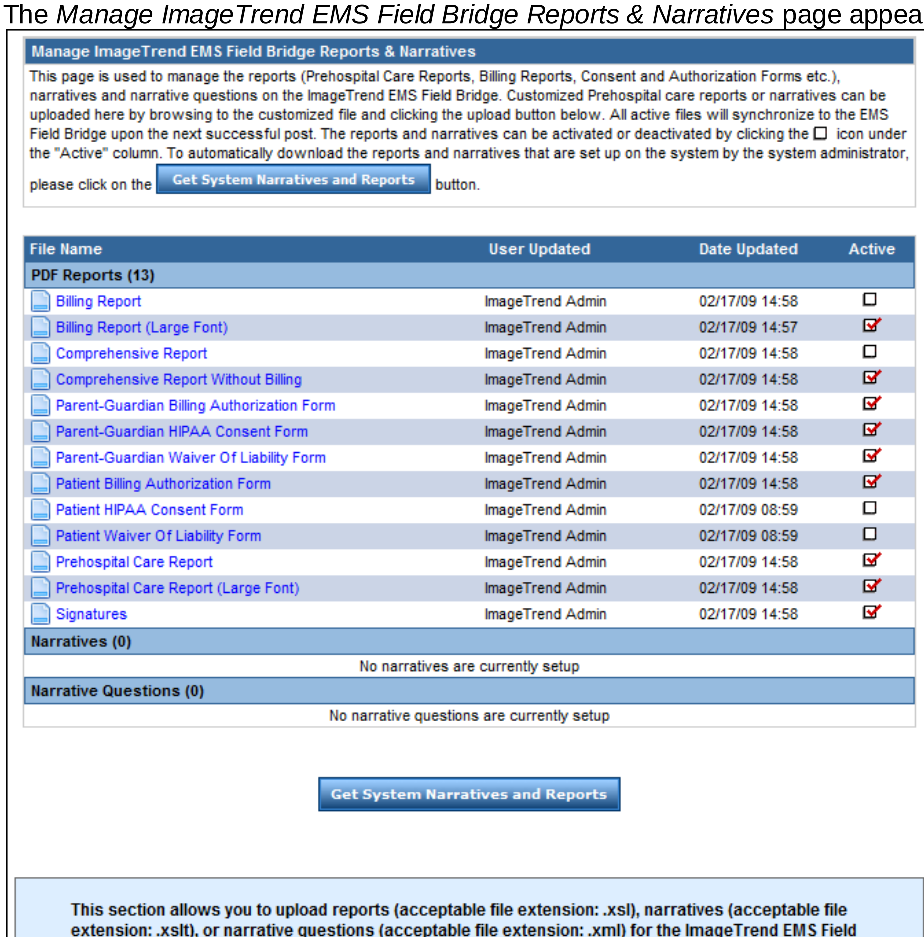
5. For the report(s) or narrative(s) to deactivate, deselect the *Active* checkbox.
   The report(s) or narrative(s) are deactivated and will not be available for use from

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 Default Reports and Narratives

If you have set up different reports and narratives to be available from the Field Bridge as from the State Bridge, you have the option of resetting the available reports and narratives to be the same as those set up for the State Bridge. State administrators will set up the reports and narratives for the State Bridge in the *Admin* section.

1. From the top left, click *My Service.*
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. 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 State 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 State Bridge and Field Bridge. Once these files have been created, you can upload them to the State Bridge 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. State administrators will set up the reports and narratives for the State Bridge in the *Admin* section.

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

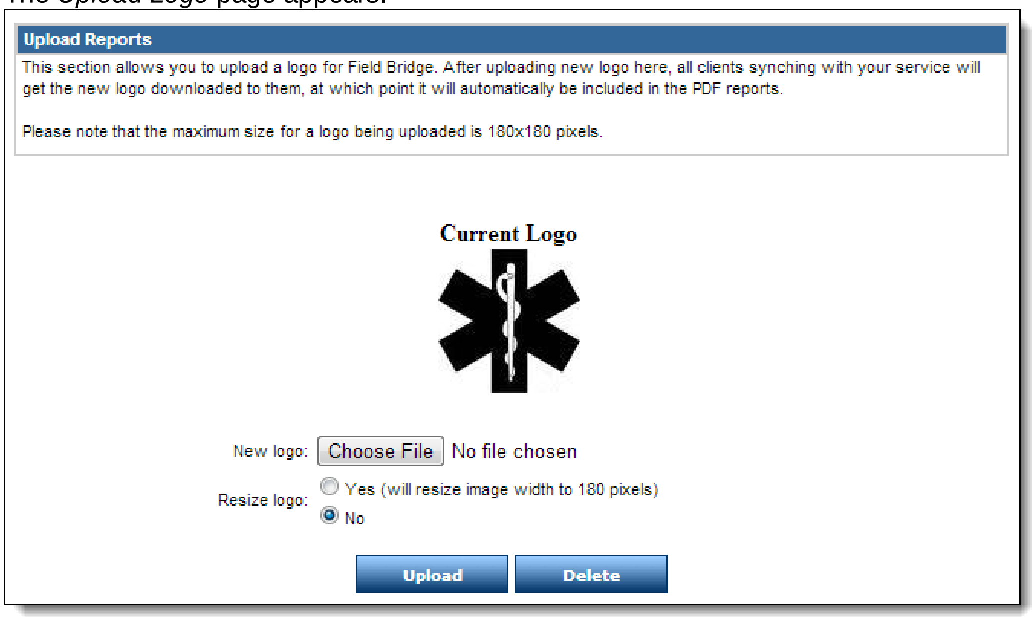
5. In the last section on the pace, in the *New file* section, click *Choose File.*
   The *Choose File* dialog box appears.
6. Navigate to and select the desired file.

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.

Uploading Logos for Reports

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

1. From the top left, click *My Service.*
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 Report Logo.*
   The *Upload Logo* page appears.



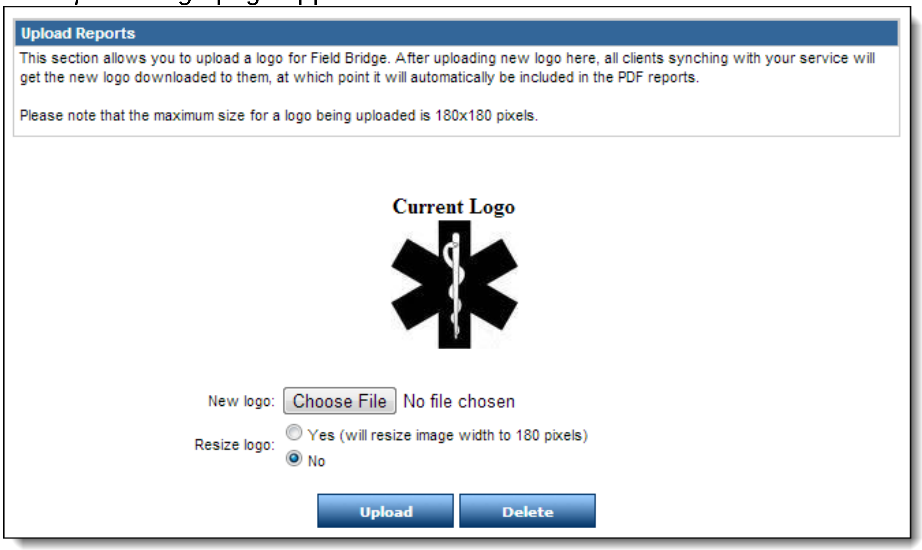
5. In the *New Logo* section, click *Choose File…*
   The *Choose file* dialog box appears.
6. Navigate to and select the desired logo document.
7. Click *Open.*
   The *Choose file* dialog box closes.
8. Click *Upload.*
   The file is uploaded and will be sent to each Field Bridge when it syncs.

Removing the Existing Logo

If for any reason you want to delete the existing logo that is being added to PDF reports without replacing it, you can do so.

1. From the top left, click *My Service.*
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 Report Logo.*
   The *Upload Logo* page appears.

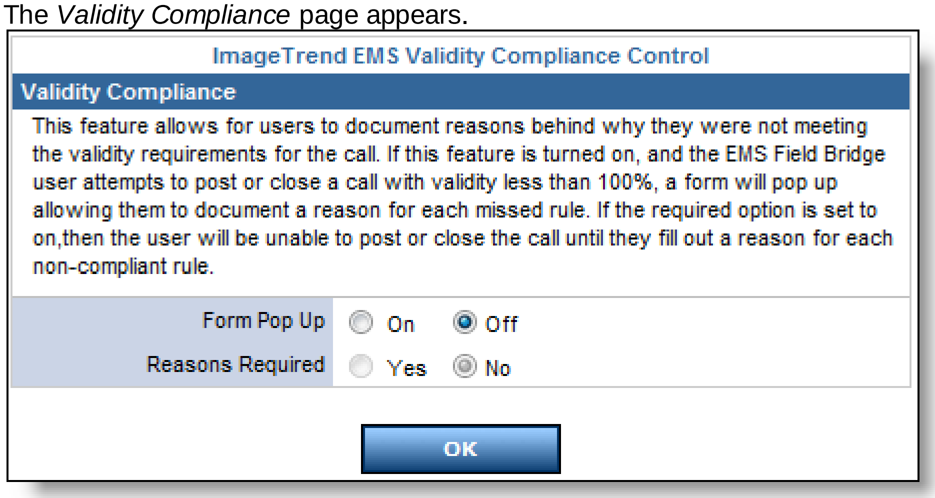


5. From the bottom of the page, click *Delete.*
   A confirmation dialog box appears.
6. Click *OK.*
   The logo is removed from your site and will no longer be used on PDF reports.

Configuring Validity Compliance Documentation

Administrators can cause a pop up window to appear whenever the validity of a run form being closed has a validity score of 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. From the top left, click *My Service.*
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.



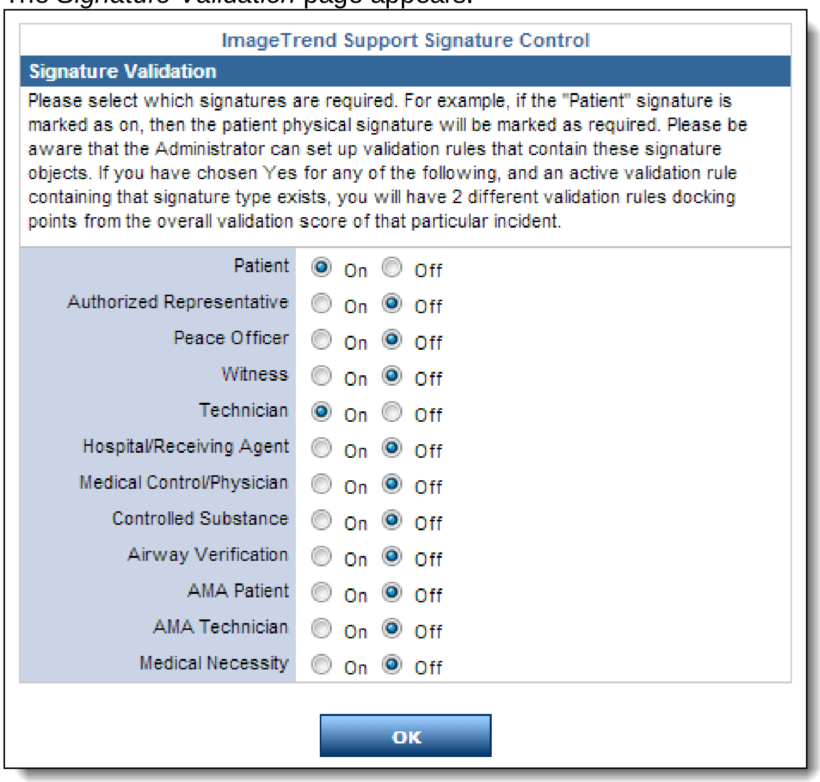
5. To cause the pop up window to appear, in the *Form Pop Up* section, select *On.*

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.*

Configuring Required Signature Validation

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

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



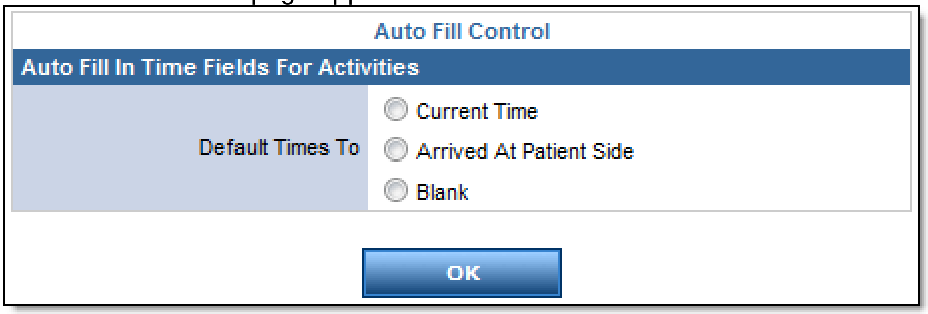
5. For the signatures to require using validation rules, select *On.*
6. For the signatures that should not be required, select *Off.*
7. When finished, click *OK.*

Setting Up Automatic Time Entry

You can set up the system to automatically enter a particular time when activity records are added to a run form.

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

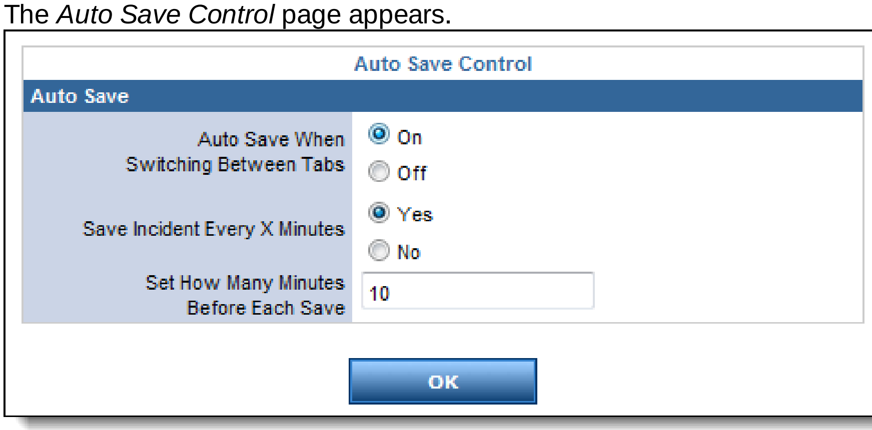


5. In the *Default Times To* section, select the time that should be automatically entered for any activity added to a run form.
6. Click *OK.*

Setting Up Automatic Saving

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

2.39 Working with Active Protocols

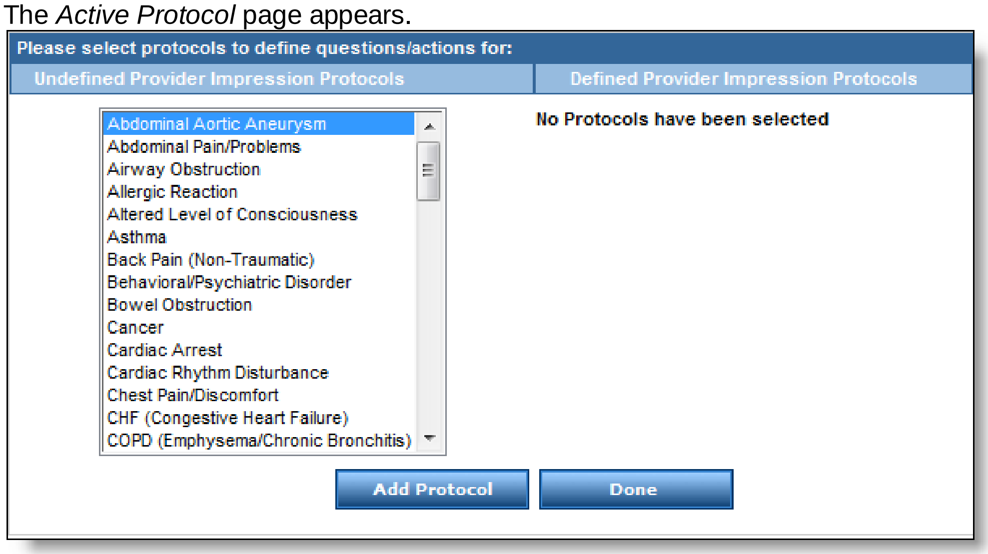
Active protocols provide a checklist of steps and links to specific fields in the run form that should be taken for any primary impression or protocol. An active protocol can be defined for any provider impression or protocol, and will help to guide staff members through performing and documenting any 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

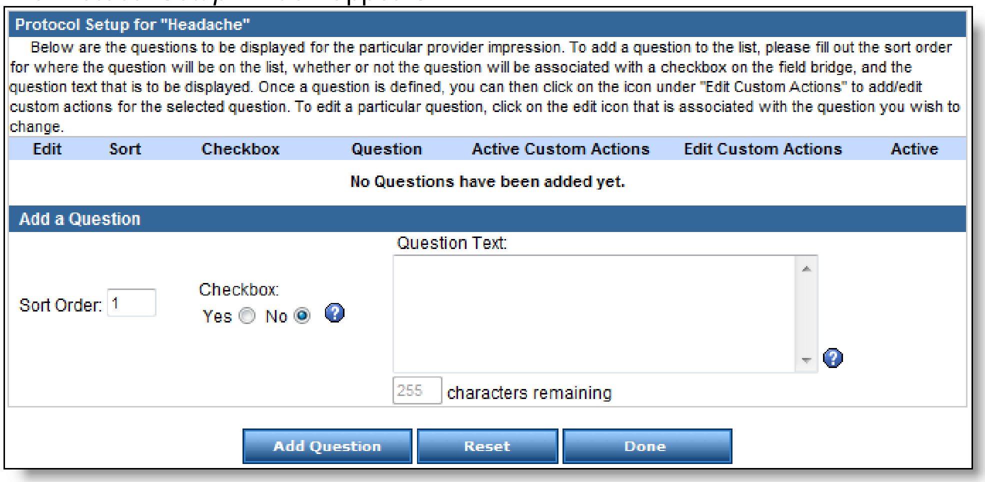
Administrators can set up new active protocols for use on the EMS Field Bridge or dynamic run form.

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



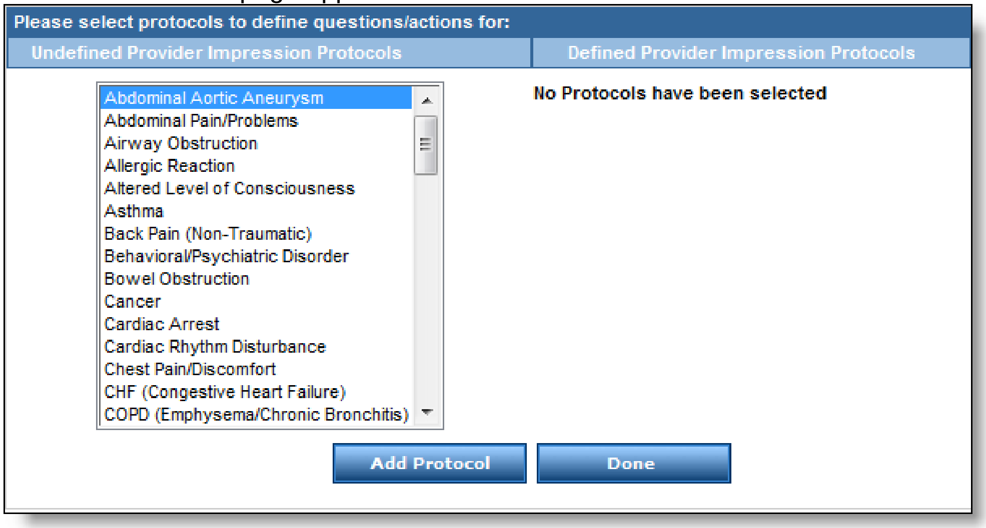
6. To create an item on the protocol checklist,
   a. In the *Checkbox* section, select *Yes.*
   b. In the *Question Text* text box, type the text for the item.
   c. To determine where in the checklist the item will appear, in the *Sort Order* text box, type the number of the item's position.
   d. 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. From the top left, click *My Service.*
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.*

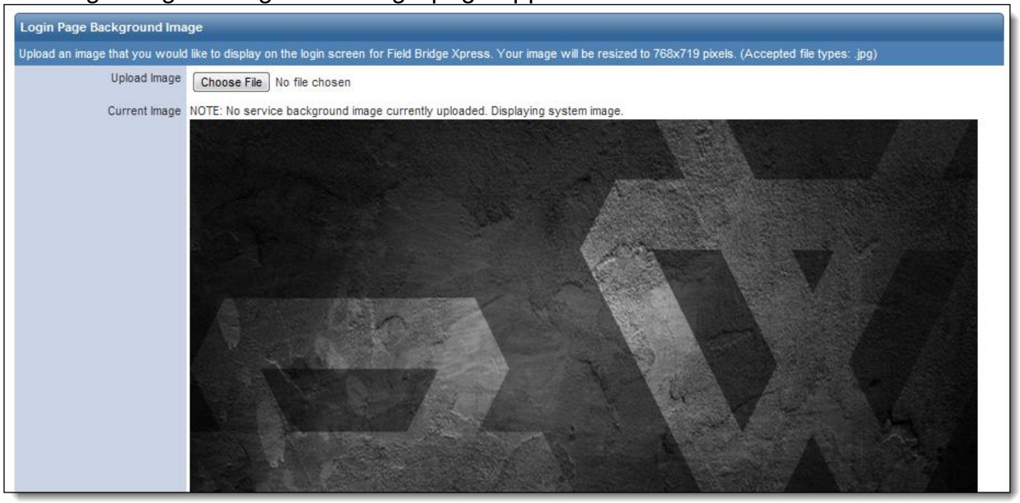
2.40 Setting a Background Image for Field Bridge Xpress

If your service uses Field Bridge Xpress, you can set a custom image for the background of the login page.

The recommended size for the background image is 768x719 pixels. If your image is a different size, it will be resized automatically. However, uploading a picture of the recommended size can ensure that your image does not get stretched or distorted in order to fit on the login page. Images must be in JPEG format.

1. From the top left, click *My Service.*
2. Select the *Setup* tab*.*

3. Under the *Field Bridge* section, click *Xpress Settings > Login Background Image.*
   The *Login Page Background Image* page appears.

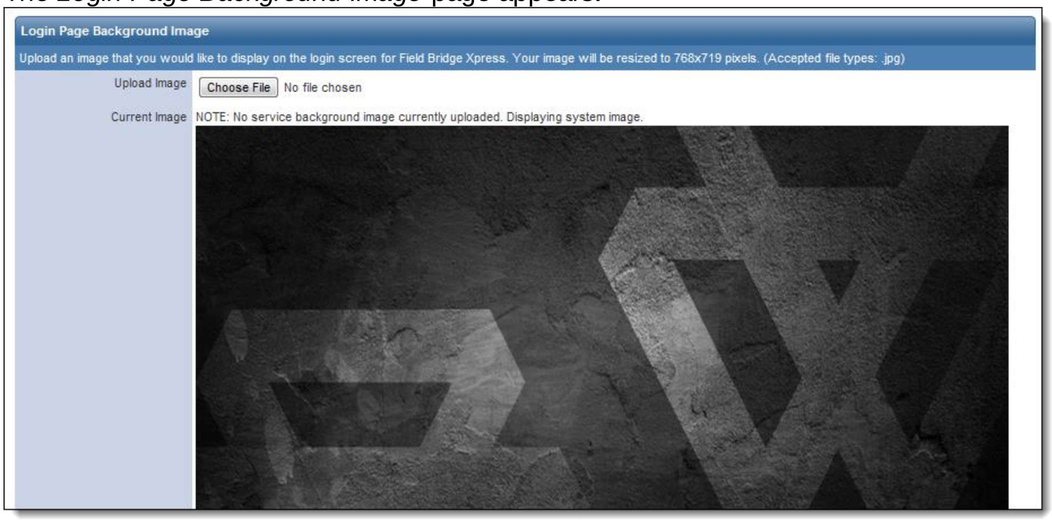


4. In the *Upload Image* section, click *Choose File.*
   The *Choose File* dialog box appears.
5. Navigate to and select the image you want to set as the background image.
6. Click *Open.*
   The file is selected.
7. From the bottom of the page, click *Upload.*
   The new background image is applied.

Reverting to the Default Image

At any point, you can revert the system-set image back to the default background image, or reset all services to the default background image.

1. From the top left, click *My Service.*
2. Select the *Setup* tab.
3. Under the *Field Bridge* section, click *Xpress Settings > Login Background Image.*
   The *Login Page Background Image* page appears.

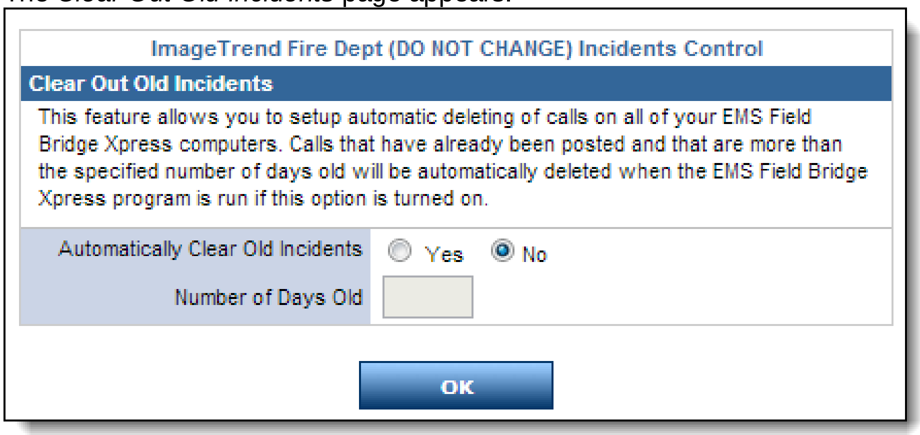


4. To revert to the default background image, from the bottom of the page, click *Revert to default.*

2.42 Configuring Incident Clearing for Field Bridge Xpress

You can use your State Bridge to set Field Bridge Xpress 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 State Bridge system.

1. From the top left, click *My Service.*
2. Select the *Setup* tab*.*
3. Under the *Field Bridge* section, select *Xpress Settings.*
   A sub-menu appears.
4. Under *Xpress Settings,* 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.

CHAPTER 3

WORKING WITH THE LAYOUT EDITOR

3.1 Chapter Overview

The Layout Editor allows you to create custom templates for PDF forms, QA/QI review 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.

3.2 Quick Reference: Opening the Layout Editor

Opening the Layout Editor for a Service

1. Click *My Service* > *Setup* > *Run Forms* > *EMS Form Configuration* > *Layout Editor*.

Opening the Layout Editor for the System

1. Click *Admin* > *Run Forms* > *Templates & Permissions* > *Layout Editor*.

NOTE: Additional information regarding opening the Layout Editor, including how to open the Layout Editor for each type of template, is available in section 3.5.

3.3 Overview of Template Types

The Layout Editor allows you to work with a variety of different types of templates that can be used throughout State Bridge and (if you use it) Field Bridge. Most of these templates will be edited in the same way, although each type does have some unique items that you can work with.

Dynamic Run Form Templates

Updating a dynamic run form template allows you to make changes to the form that providers use to document run forms with State Bridge, Field Bridge and/or Field Bridge Xpress. Dynamic run form templates allow you to enter and update the fields that can be filled out within the form.

QA/QI Review Templates

Updating QA/QI review templates allows you to create or make changes to the form(s) that are used to in QA/QI review. QA/QI review templates allow you to add and update QA/QI questions that can be filled out within the form and the run form fields that will be read-only for review.

NOTE: Before creating QA/QI templates, you will want to set up QA/QI questions.

PDF Report Templates

Updating PDF report templates allows you to create or make changes to the reports that can be printed from a run form. PDF report templates allow you to add or edit the incident information that will appear on the PDF report.

QA/QI Report Templates

Updating QA/QI report templates allows you to create or make changes to the reports that can be printed from a QA/QI review form. QA/QI report templates allow you to add or edit both the QA/QI questions and the incident information that will appear on the PDF report.

NOTE: Before creating QA/QI templates, you will want to set up QA/QI questions. For more information, please refer to the *Working with the QA/QI Module* chapter.

3.4 Getting Started with Templates

The following information about run form, PDF report and QA/QI form templates provides you with an overview and considerations for creating your own templates.

Dynamic Run Form Templates: Tips and Recommendations

Using State Bridge, administrators can create new custom EMS run forms for the Field Bridge and State 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 state 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.

- 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 State 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.

QA/QI Review Templates: Tips and Recommendations

A QA/QI form template allows you to create a form that displays both the question that needs to be answered (e.g., *Was the correct date of service entered*) and the field that the data is contained within (e.g., the *Incident Date* field). When reviewers use this template, they will see the question as a field that they can fill out, and the associated field from the incident form will display the information that is recorded for the incident they are working with.

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.

- When beginning to work with creating or editing templates, ImageTrend recommends that you create a copy of the QA/QI review form template you are working with. Make changes to the copy to prevent accidental changes to a necessary form that is currently in use.
- When creating a new form, 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 use an unfinished review form.

- We recommend a two-column layout for QA/QI forms, so that you can put the QA/QI form question in one column and the information that needs to be reviewed in the other column.

Report Templates: Tips and Recommendations

The PDF Layout Editor is available for people who have access to the Layout Editor in State Bridge. The PDF Layout Editor allows you to customize templates for the printable PDF reports that are generated from EMS run forms and/or QA/QI review forms. This information applies to both types of PDF reports.

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.

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

- 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.

Template Structure Overview

When editing 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.

- New and copied dynamic run form and QA/QI form templates

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 forms.

- New and copied PDF report and QA/QI PDF report templates

Template
You can edit information for the entire 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 determining whether this is a dynamic run form, QA/QI form, PDF report or QA/QI PDF report

- Setting determining which product (e.g., State Bridge, Field Bridge) the template will be used for (applicable for only dynamic run form templates)

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 (for PDF and QA/QI PDF reports only)
- Theme information (e.g., font, color) for the report (for PDF and QA/QI PDF reports only)

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 (for PDF and QA/QI PDF reports only)
- Physical layout of panels (e.g., number of rows or columns)
- Controls included in a panel

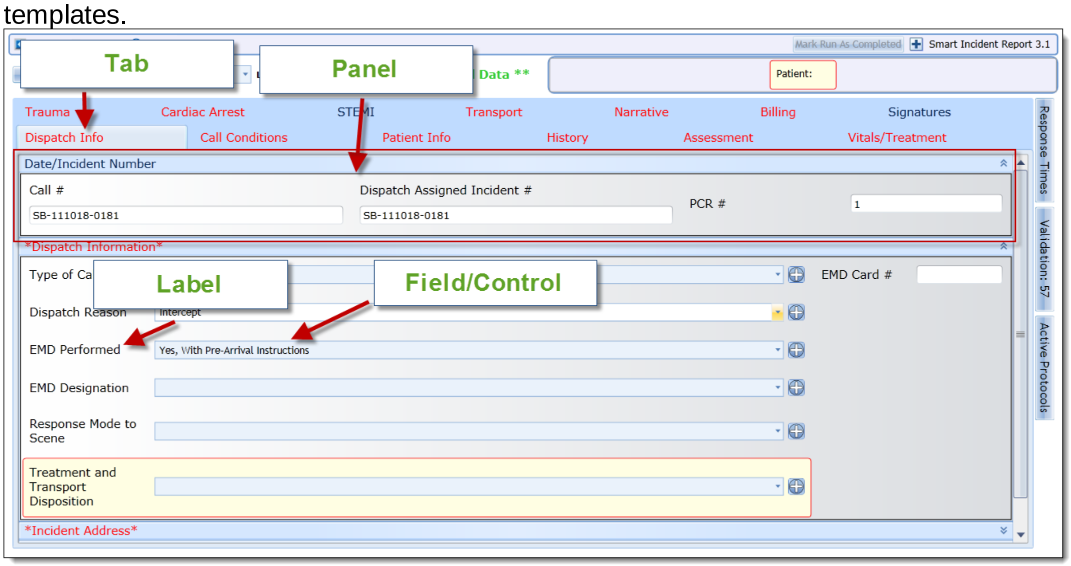
Controls
You can edit the following information when editing a specific control:

- 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)

3.5 Layout Editor Terms to Know

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

EXAMPLE: The following image illustrates several common terms related to the layout of run form 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.

App Type

The app type is a setting on each template that determines what applications will use this template and for what. App types include:

- Field Bridge (for ONLY Field Bridge)
- Field Bridge/Service Bridge (For Field Bridge AND Service Bridge/State Bridge/Rescue Bridge)
- Service Bridge (for ONLY Service Bridge/State Bridge/Rescue Bridge)
- QA/QI Review (for doing QA/QI review in the QA/QI module)
- PDF Layout (for printable PDF reports from the dynamic run form)
- PDF QA/QI Report (for printable PDF reports from QA/QI forms)
- Field Bridge Xpress (for ONLY the Field Bridge Xpress application)
- TapChart (For the legacy TapChart application)

Control

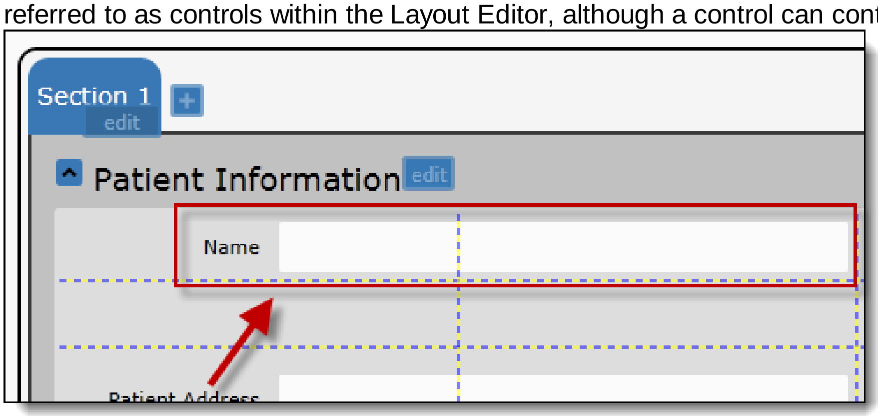
A control is a specific field that can be inserted into a template using the Layout Editor. Controls are also frequently called fields; however, a control can also contain several fields (for example, the Technician Signature control contains individual fields for the technician to sign, print his/her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

Default Value

A default value is the data that will be entered in a field automatically when a new run form is started. (This option is available for dynamic run form templates and QA/QI form templates.)

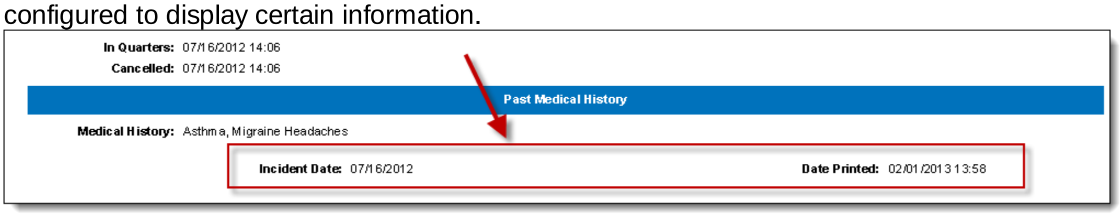
Field

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.



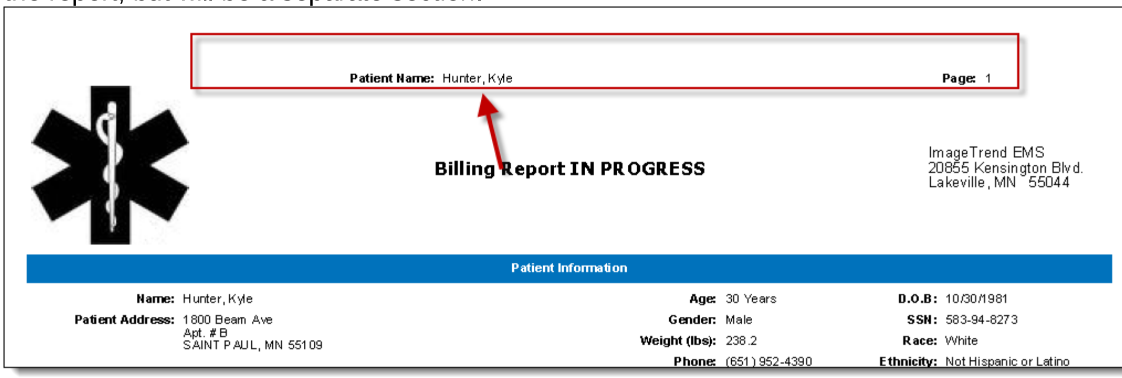
Footer

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



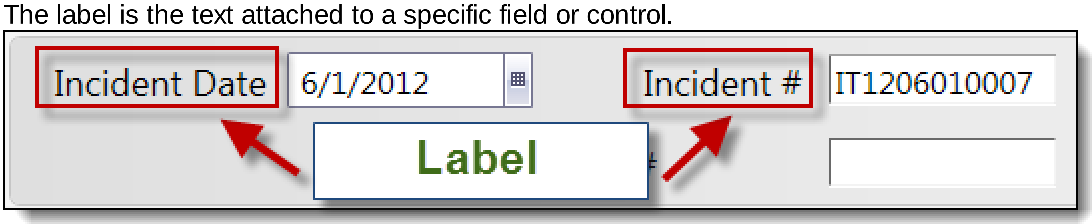
Header

The header is a section at the top of the page in report templates 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.



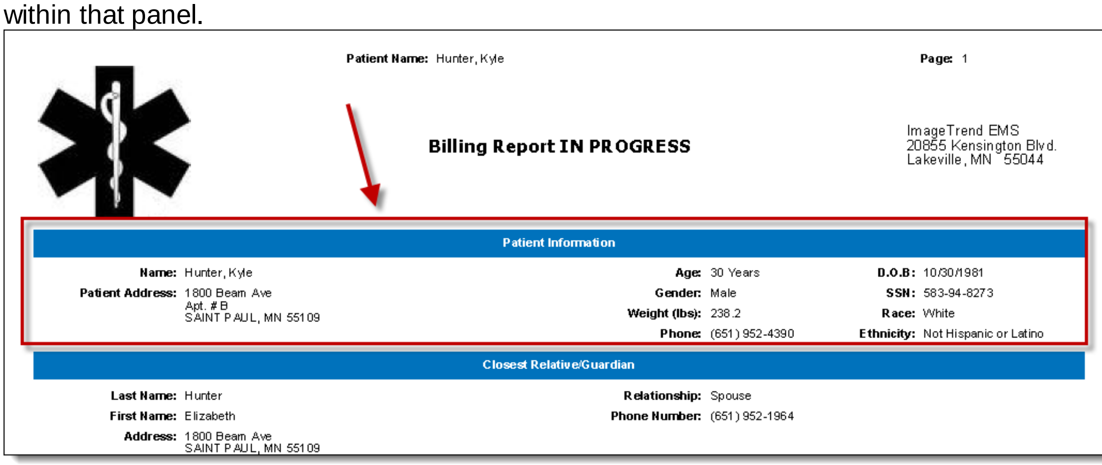
Label

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. For form templates, panels can generally be expanded or collapsed to show or hide the information included within that panel.



Tab

A tab is a collection of panels that will be grouped together. For report templates, a page break will be placed at the beginning of each new tab. For form templates, users will need to click on the tab to view the information within it.

Theme

A theme is the visual style settings that will be used in report templates, 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.

3.6 Opening the Layout Editor and PDF Editor

Depending on your role and the permissions available to you, you can open the Layout Editor from several different places within the system. Since the dynamic run form can be used for both Service Bridge and Field Bridge, you will be able to edit run form templates for both applications in the Layout Editor, no matter where you access it from.

Opening the Layout Editor for a Service

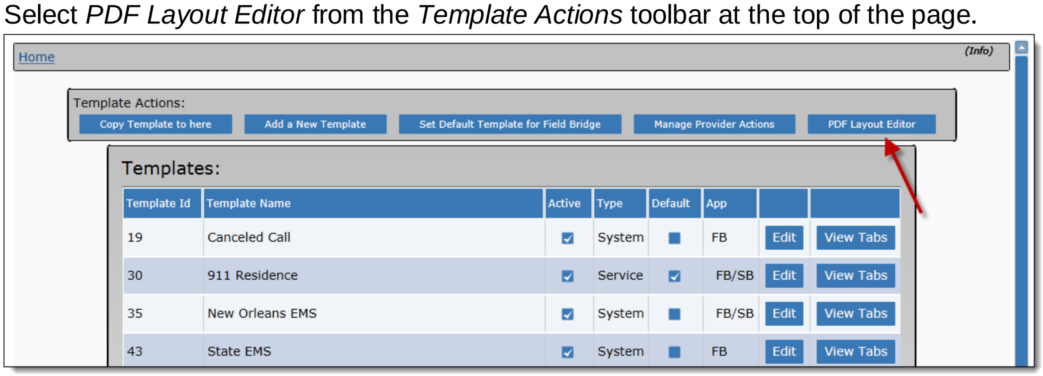
This option will be used by service administrators or when setting up templates for an individual service. From the Layout Editor for a service you can navigate to run form templates and PDF report templates.

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 *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.

Opening the PDF Editor

1. Follow steps 1–4 from *Opening the Layout Editor for a Service* section.
2. Select *PDF Layout Editor* from the *Template Actions* toolbar at the top of the page.



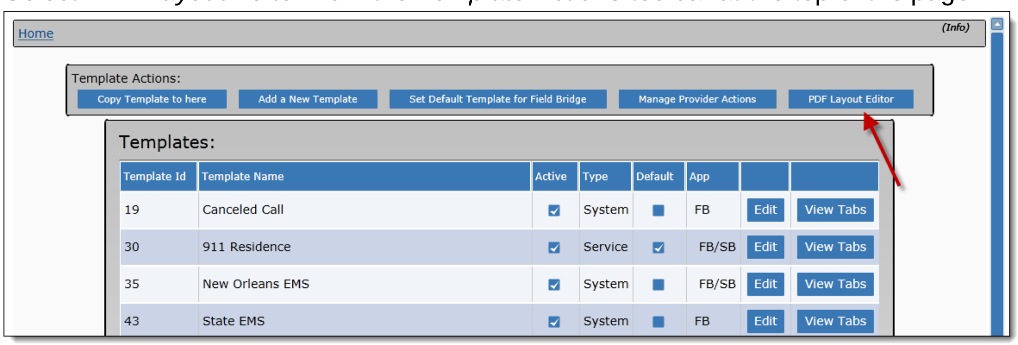
Opening the Layout Editor for the System

This option will be used by system administrators or when setting up templates for the entire system. Some additional options may be available through this section. From the Layout Editor for a system you can navigate to run form templates and PDF report templates.

1. From the top right, click *Admin.*
   The *Admin* section appears.
2. Under *Run Forms > Templates & Permissions,* click *Layout Editor.*
   The *Layout Editor* page appears.
   HINT: If you do not see the sub-menu under *Run Forms* or *Templates & Permissions,* click the appropriate header to expand the sub-menu.

Opening the PDF Editor

1. Follow steps 1–4 from *Opening the Layout Editor for the System* section.
2. Select *PDF Layout Editor* from the *Template Actions* toolbar at the top of the page.



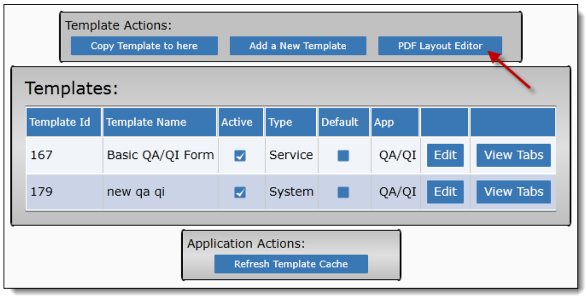
Opening the QA/QI Layout Editor for a Service

This option will be used by service administrators. This section will describe a quick way to navigator to QA/QI templates and the associated PDF report templates.

1. From the top left, click *My Service.*
2. Select the *Setup* tab.
3. Under the *Service Settings and Resources*, select *Service.*
   A sub-menu appears.
4. Under *Service*, select *QA/QI Layout Editor.*
   The Layout Editor opens.

Opening the PDF Editor

1. Follow steps 1–4 from *Opening the QA/QI Layout Editor for a Service* section.
2. Select *PDF Layout Editor* from the *Template Actions* toolbar at the top of the page.

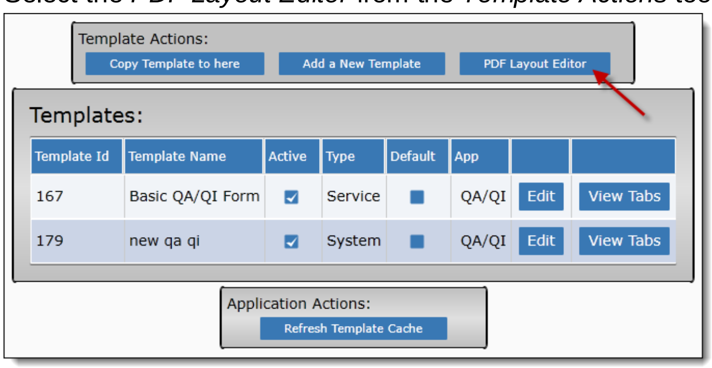


Opening the QA/QI Layout Editor for a System

1. From the top right, click *Admin*.
   The *Admin* section appears.
2. Under *Product Settings > QA/QI,* click *QA/QI Layout Editor.*
   The Layout Editor appears.
   HINT: If you do not see the sub-menu under *QA/QI* or *Product Settings,* click the appropriate header to expand the sub-menu.

Opening the PDF Editor

1. Follow steps 1–4 from *Opening the QA/QI Layout Editor for a System* section.
2. Select the *PDF Layout Editor* from the *Template Actions* toolbar.



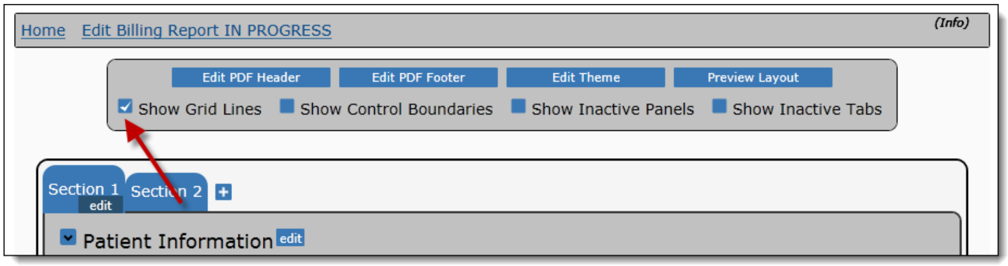
3.7 Updating the Display of the Layout Editor

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 templates in the Layout Editor.

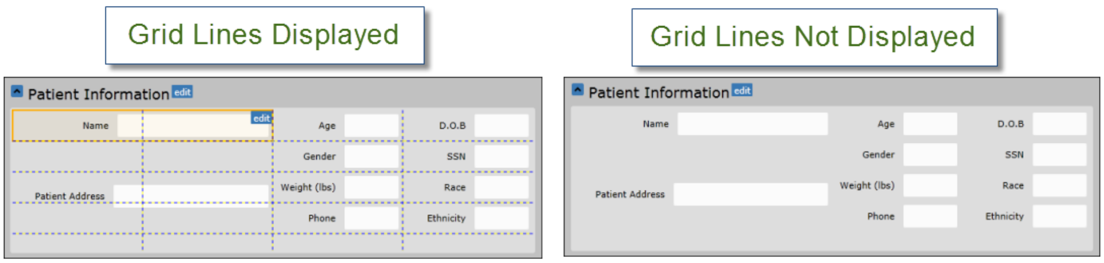
1. Open the Layout Editor.
   HINTS:
   For more information, please refer to the *Opening the Layout Editor* section on page 114.
   You can control the display options for run form and PDF report templates separately. If you are

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.

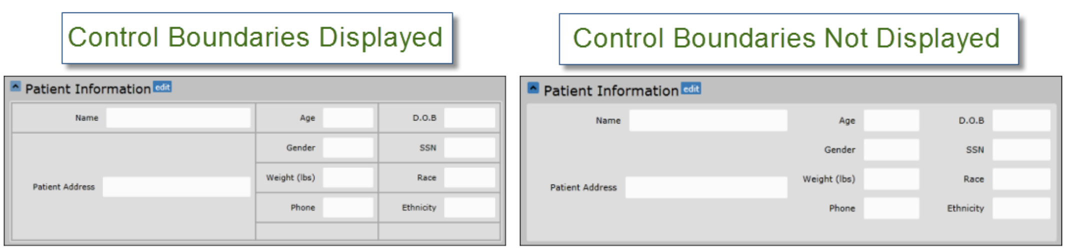


EXAMPLE:



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:



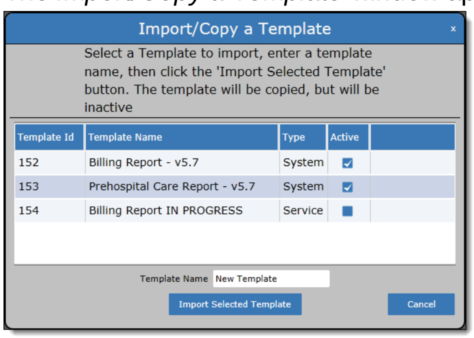
5. If you want to hide panels that were marked as inactive while you work with the template, deselect the *Show Inactive Panels* checkbox.
   OR
   If you want to show panels that were marked as inactive while you work with the template, select the *Show Inactive Panels* checkbox.
6. If you want to hide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

3.8 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.
   NOTE: If you are copying a PDF report template, open the PDF Layout Editor.
   HINT: For more information, please refer to the *Opening the Layout Editor* section on page 114.
2. To create a copy of a template to your current location (i.e., to create a service template for the service you are working with, click *Copy Template to Here.*
   The *Import/Copy a Template* window appears.
   

3. From the list of available templates, select the template you want to copy.
4. In the *Template Name* text box, type a unique name for this template.
5. Click *Import Selected Template.*
   A copy of the template is created and the *Import/Copy a Template* window closes.

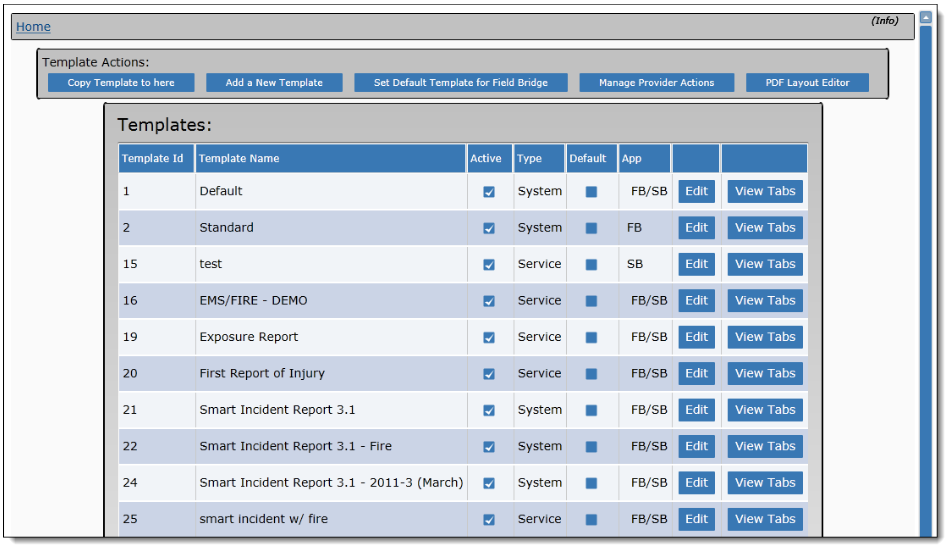
3.9 Adding a New Template

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 on page 118.

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

114.



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.
   HINTS:
   If you are creating a PDF report template, *PDF Layout Editor* must be selected.
   If you are creating a QA/QI review form template, *QA/QI Review* 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.

3.10 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.

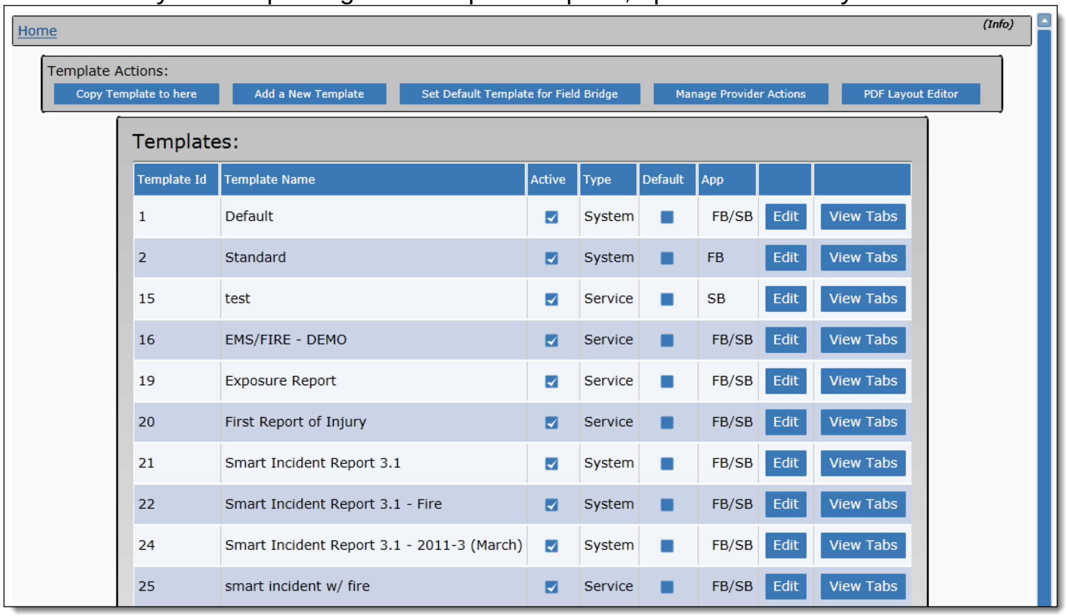
1. Open the Layout Editor.
   NOTE: Do not open the PDF Layout Editor; you will need to work with the run form template.
   HINT: For more information, please refer to the *Opening the Layout Editor* section on page 114.
2. Locate a copy of the run form template you want to turn into a PDF report template.
   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.

3.11 Editing the Name of a Template

Using State Bridge, 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 114.

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.

3.12 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.

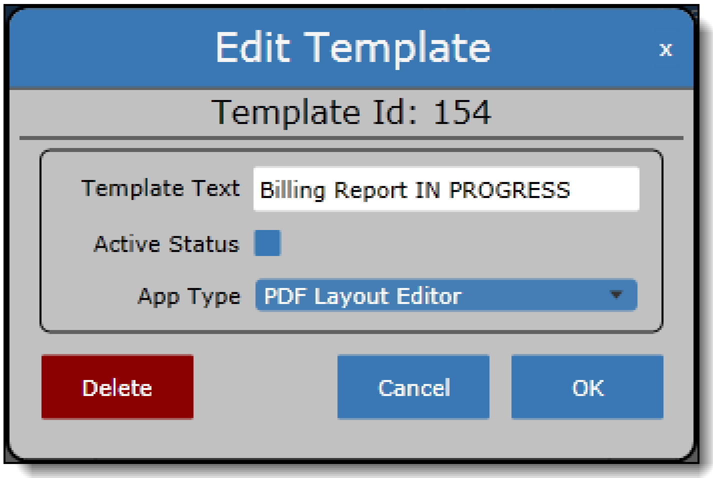
1. Open the Layout Editor.
   The *Layout Editor* page appears.

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

114.

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.



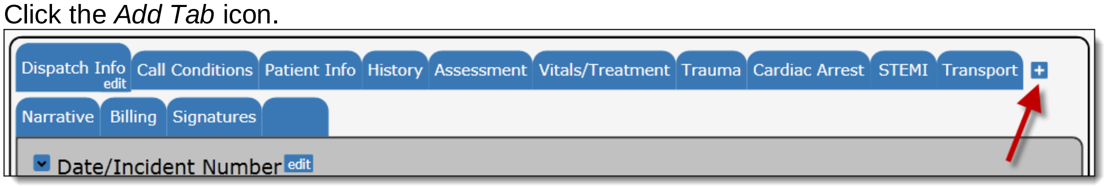
3. To indicate that this report is currently active and available for users, ensure that the *Active Status* checkbox is selected.
   OR
   To indicate that this report is currently inactive and not yet available for users, deselect the *Active Status* checkbox.
   HINT: We recommend that you do not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

3.13 Adding a Tab

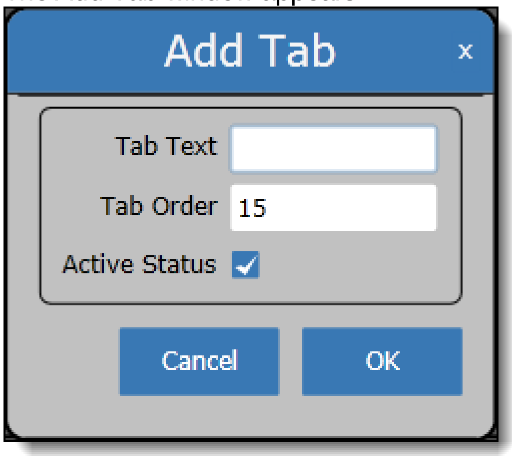
If necessary, you can add a new tab to any run form or PDF report template.

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 114.
   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.

3.14 Updating the Details of a Tab

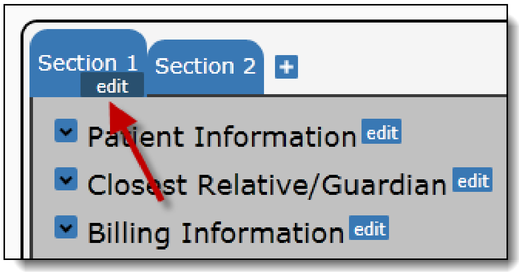
You can update the name or order of any tab in a template, as well as selecting whether that tab is active or inactive.

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

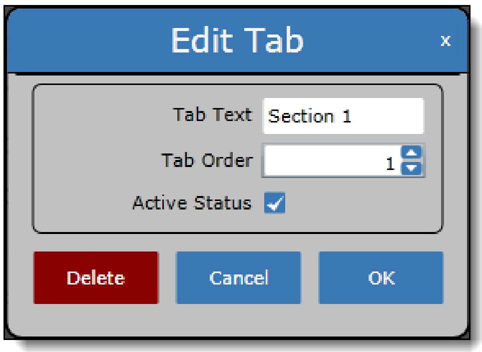
114.

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.

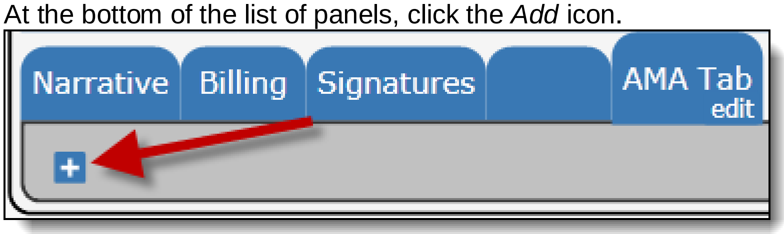
8. Click *OK.*
   The changes to the tab are saved.

3.15 Adding a Panel to a Template

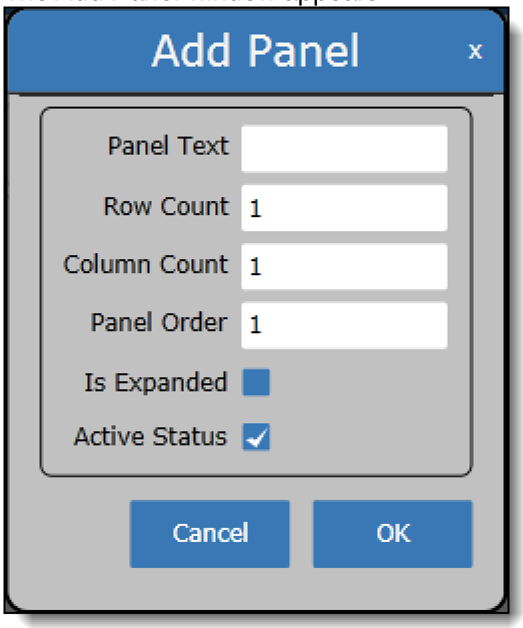
You can add a new panel to any tab in a template. When adding a panel, you may want to have some idea of how many controls you would like to include so that you can set a number of rows and columns for the panel.

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 114.
   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 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.
10. 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.

3.16 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.

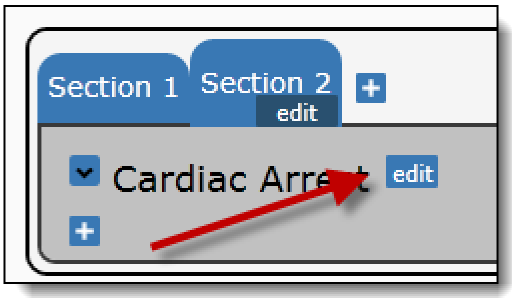
Editing Panel Details

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).

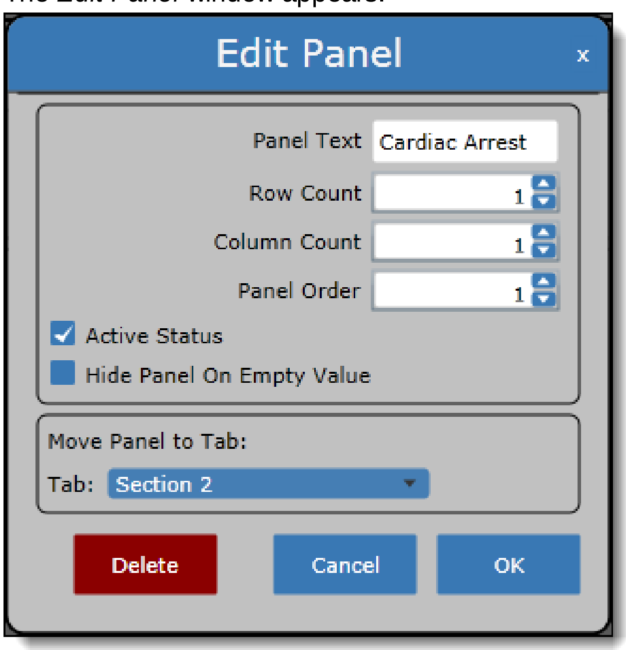
1. Open the Layout Editor.

   HINT: For more information, please refer to the *Opening the Layout Editor* section on page 114.

   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.

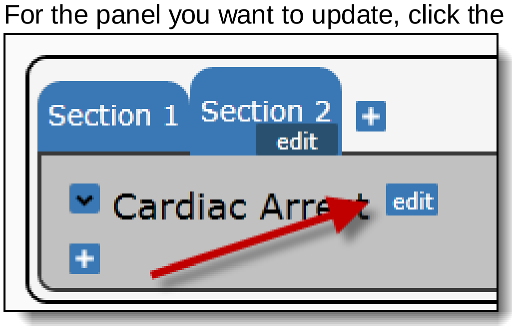
5. To change the header of the panel, in the *Panel Text* text box, type the appropriate name.
6. In the *Row Count* and *Column Count* text boxes, update the number or rows and columns that should appear in this panel, as needed.

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 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.
9. 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.
10. 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.
11. When finished, click *OK.*
    The changes are saved.

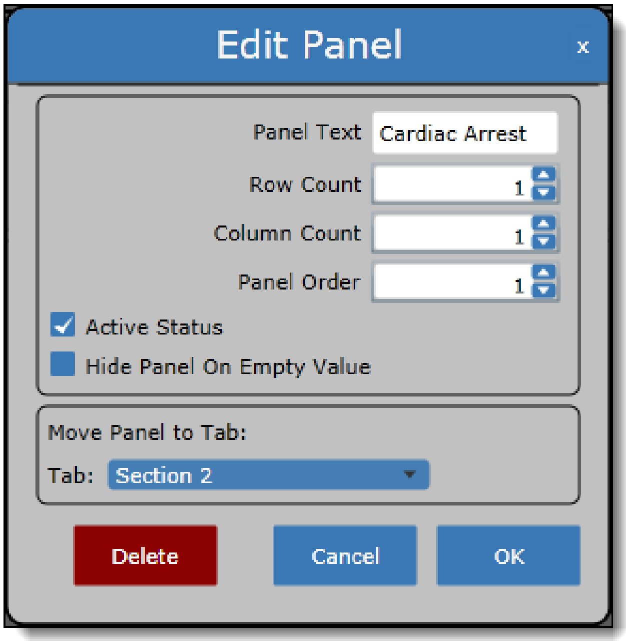
Moving a Panel to a Different Tab

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 114.
   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.



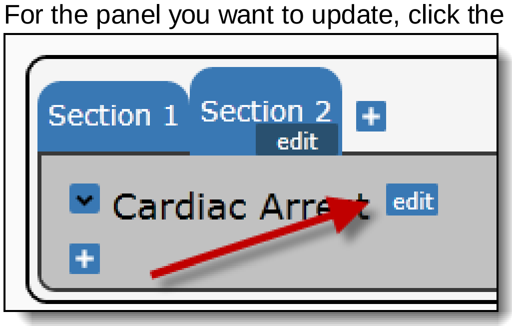
5. From the *Move Panel to Tab* drop down menu, select the tab that this panel should be moved to.
6. Click *OK.*
   The panel is moved.

Hiding a Panel with No Data

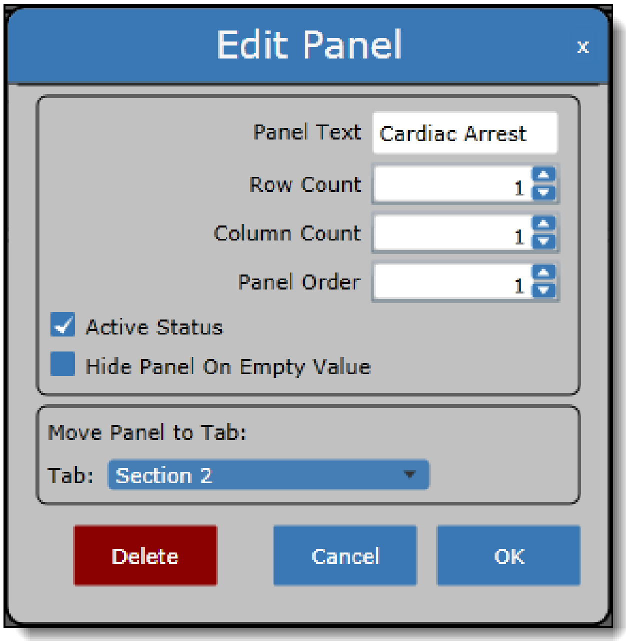
NOTE: This option is available only for PDF report templates.

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 114.
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.

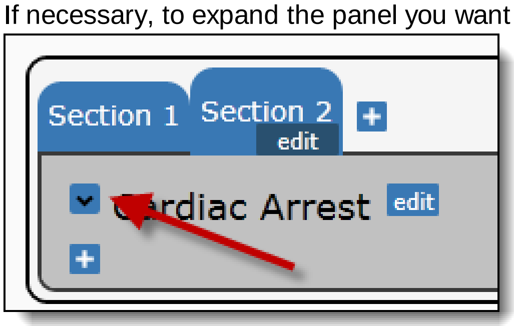


5. To hide this panel if none of the fields have data for the report being printed, select the *Hide Panel On Empty Value* checkbox.
6. When finished, click *OK.*
   The changes are saved.

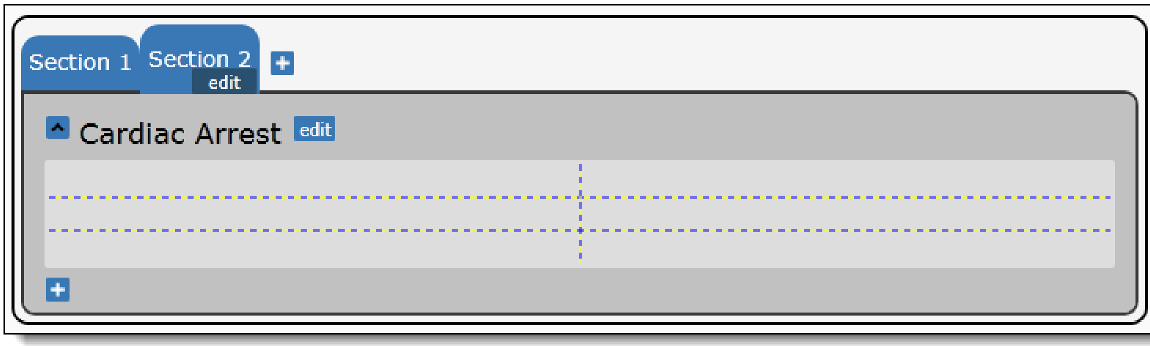
3.17 Adding a Control to a Template

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.

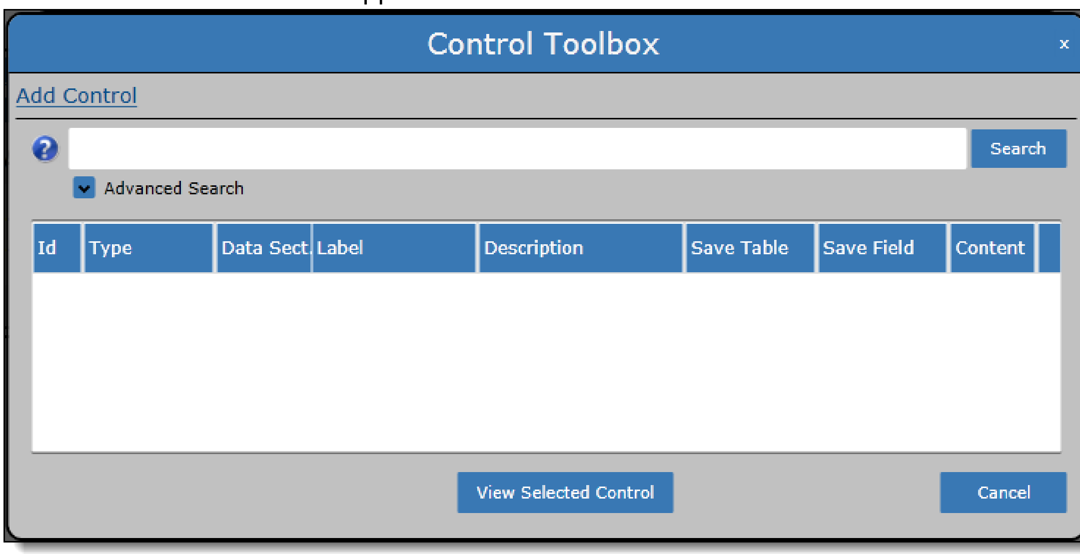
1. Open the Layout Editor.
   The *Layout Editor* page appears.
   HINT: For more information, please refer to the *Opening the Layout Editor* section on page 114.
   NOTE: If you are updating a PDF report template, open the PDF Layout Editor.
2. For the template you want to edit, click the *View Tabs* 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.



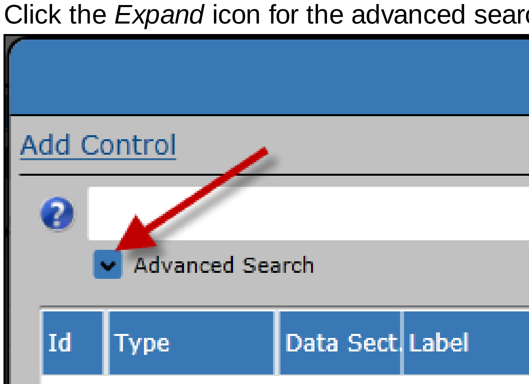
The panel opens.



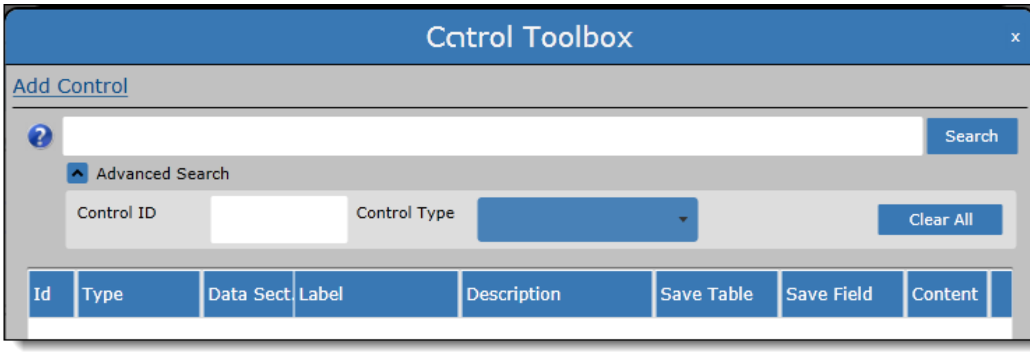
5. Hover your mouse above the empty cell you want to add the control to.
   The *Add Control* option appears.
6. Click the *Add Control* button.
   The *Control Toolbox* window appears.



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.

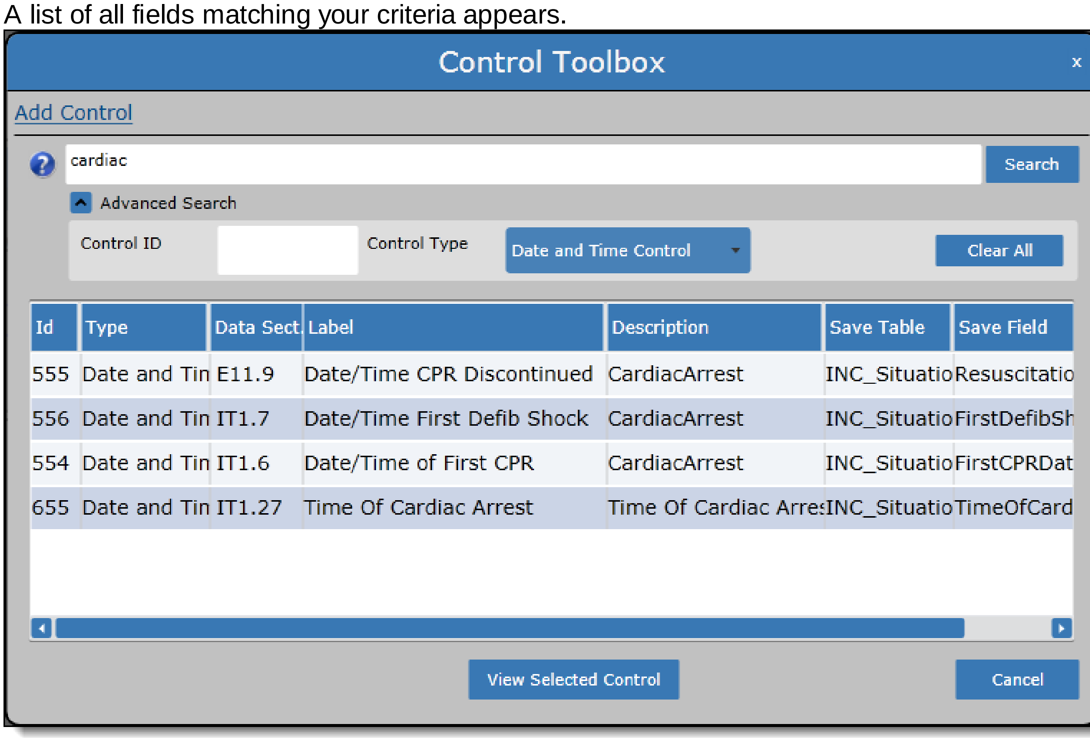


Additional search options appear.



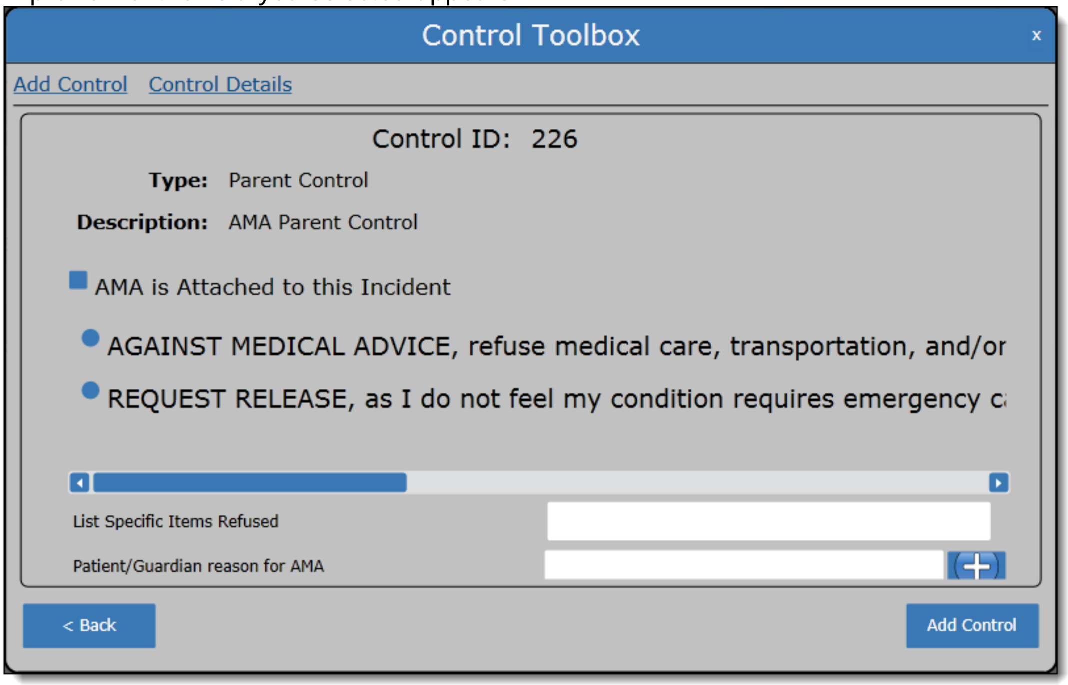
b. As needed, type a control ID or select a control type to search for.

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.

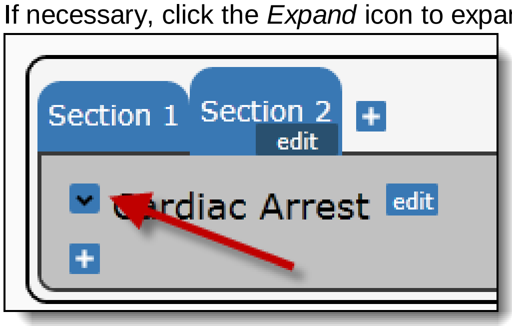


11. If this is the correct field, click *Add Control.*
    The field is added to the panel.
    OR
    If this is the incorrect field,
    a. Click *Back.*
       You are returned to the *Search* page.
    b. Repeat steps 7–11 until the desired field is added.

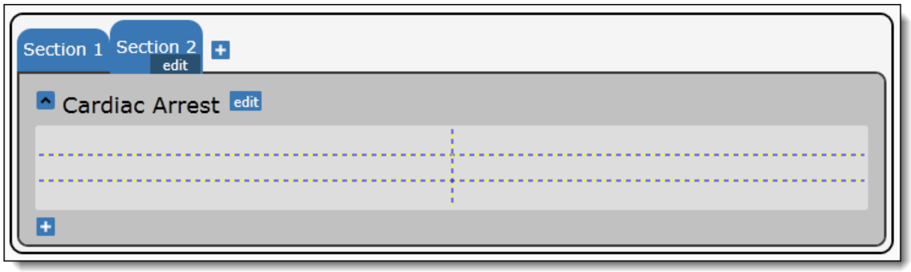
Adding a QA/QI Question

Adding a QA/QI question as a control to a template is very similar to adding any other control, although you will be able to select which question you want to insert.

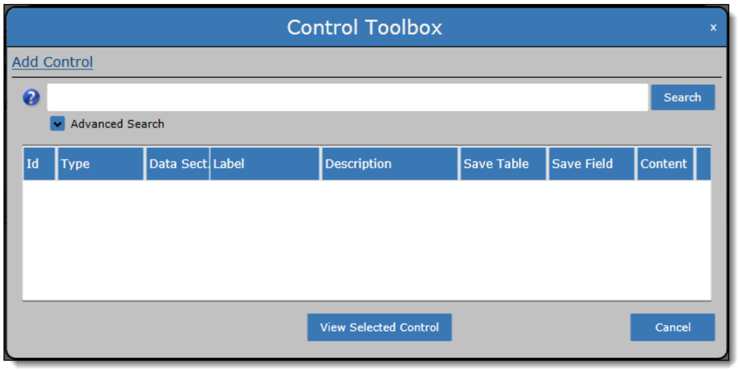
1. Open the Layout Editor.
   NOTE: If you are updating a PDF report template, open the PDF Layout Editor.
2. For the template you want to add a tab to, click the *View Tabs* button.
   A list of existing tabs for the template appears.
3. Click the tab containing the panel you want to update.
   The tab appears.
4. If necessary, click the *Expand* icon to expand the panel you want to add the control to.



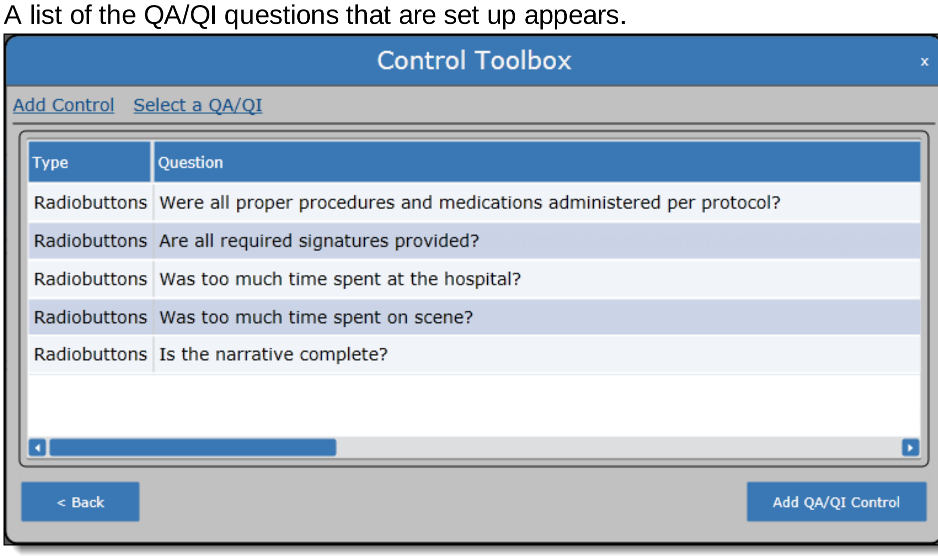
The panel opens.



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. Search for *QA.*
8. If you want to enter a system-level QA/QI question, select the *System QA/QI Question for QA/QI Review* control.
   OR
   If you want to enter a service-level QA/QI question, select the *Service QA/QI Question for QA/QI Review* control.
9. **NOTE:** You will not be able to add service-level QA/QI questions if you are working with a template in the *Admin* section.
10. Click *View Selected Control.*
    A list of the QA/QI questions that are set up appears.



11. Select the question you want to insert.
12. Click *Add QA/QI Control.*
    The selected question is added.

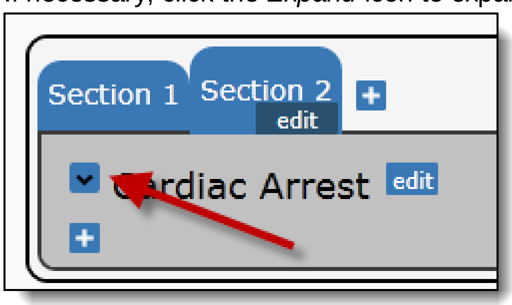
3.18 Updating Controls

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.

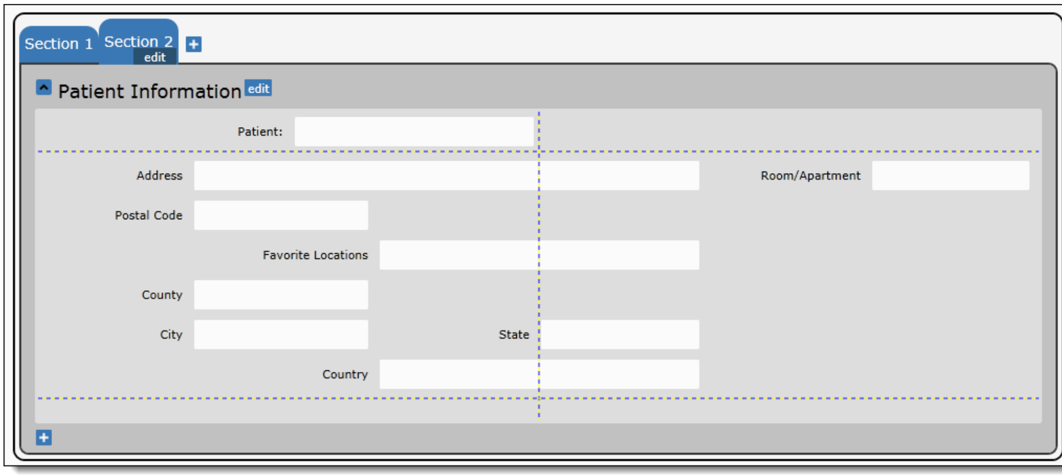
Working with Parent Controls

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.

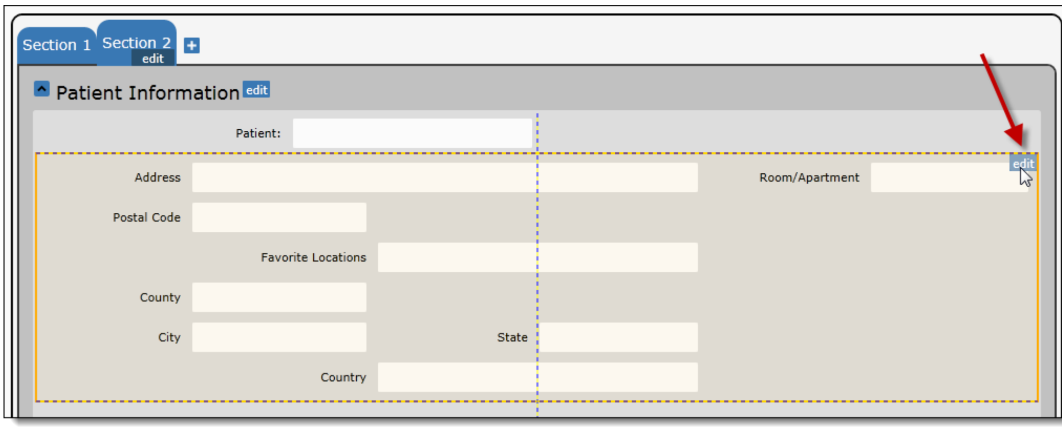
1. Open the Layout Editor.
   HINT: For more information, please refer to the *Opening the Layout Editor* section on page 114.
   NOTE: If you are updating a PDF report template, open the PDF Layout Editor.
2. For the template you want to add a tab to, click the *View Tabs* button.
   A list of existing 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.

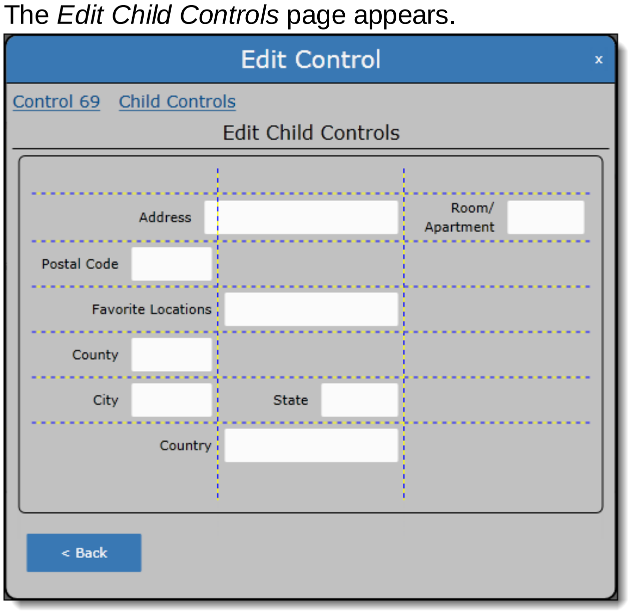


5. Hover your mouse above the parent control.
   The *Edit* button appears.
6. Click the *Edit* button.



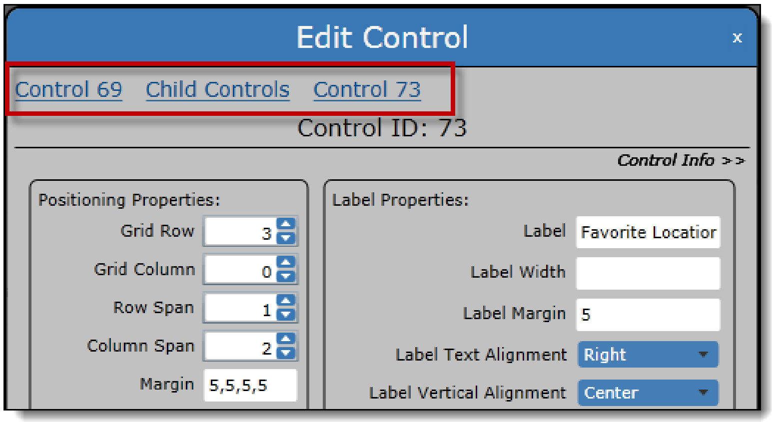
The *Edit Control* window for the parent control appears.

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.

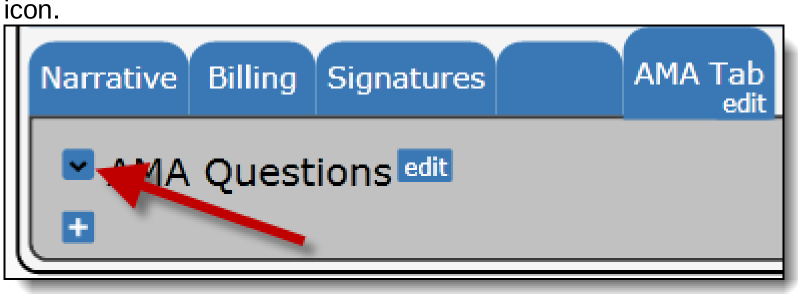


10. Make any needed changes to this child control.
11. When finished, click *Save & Back.*
    You are returned to the previous page.

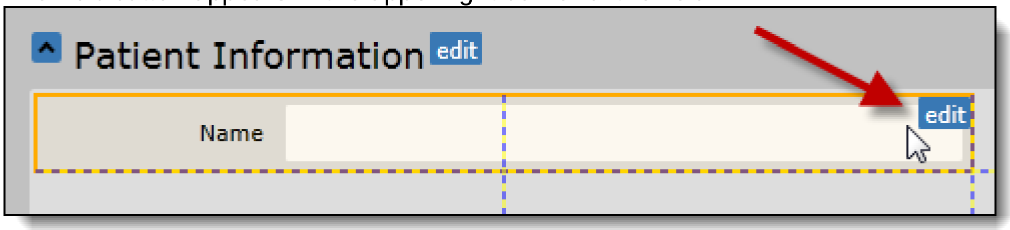
Editing the Details of a Control

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 114.
   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 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.
21. To add a value that should be selected by default,
    a. Click *Add Default Value.*

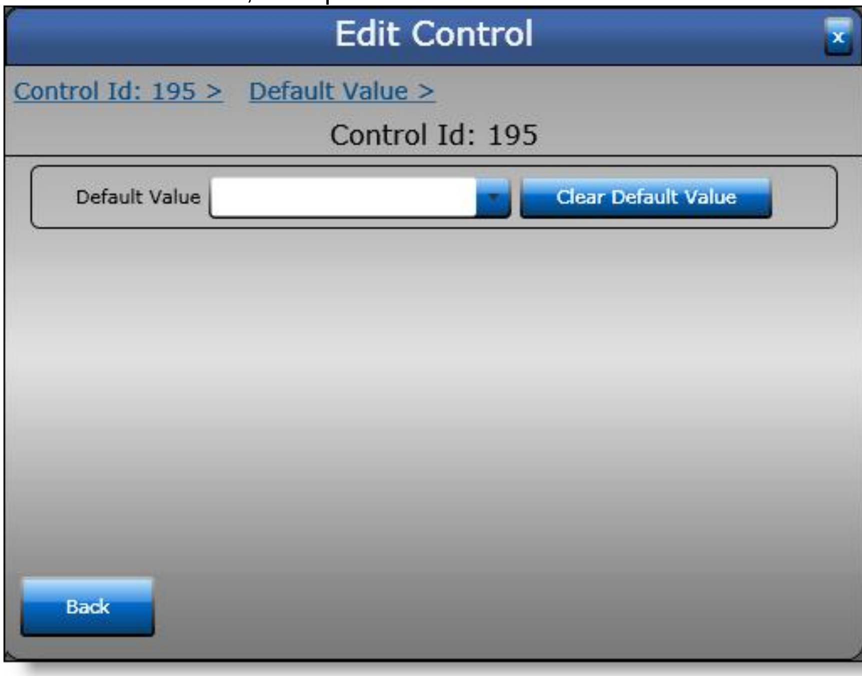
       The *Edit Control* dialog box appears.

       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.



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.*

22. To enable a spell check feature for this field, in the *Other Properties* section, select *Spell Check On.*

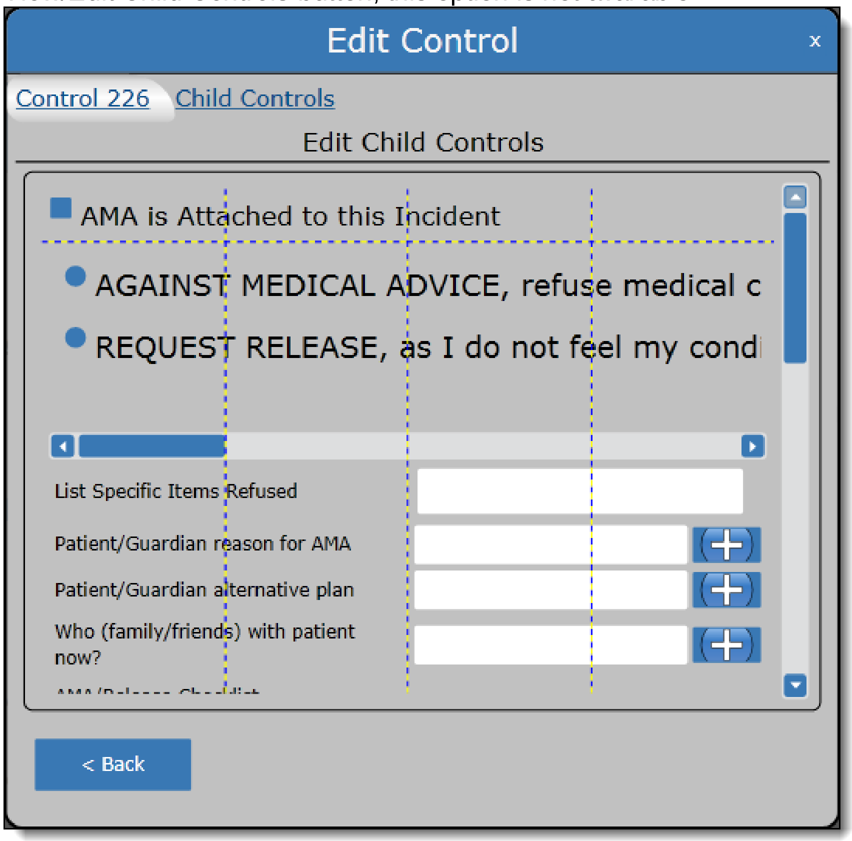
    NOTES:
    This option is available only for run form templates.
    Not all fields will allow you to enable spell check. If you do not see the *Spell Check On* checkbox, this option is not available.

23. 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.

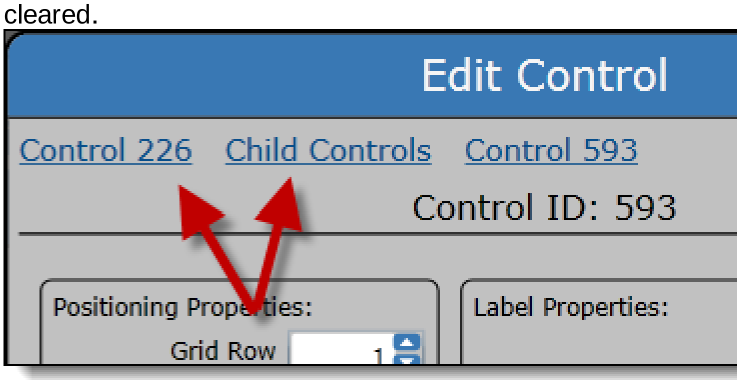
    NOTE: Not all fields contain multiple columns; this is commonly associated with parent controls. If you do not see the *Row Count* and *Column Count* text boxes within the *Other Properties* section, this option is not available.

24. 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 7–23 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.



25. When finished with all editing, click *Save & Close.*

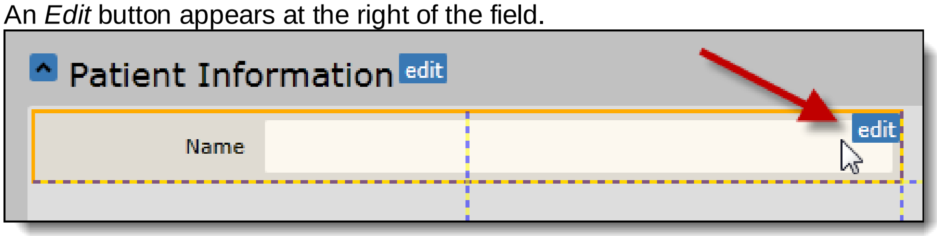
Moving a Control

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 114.
   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

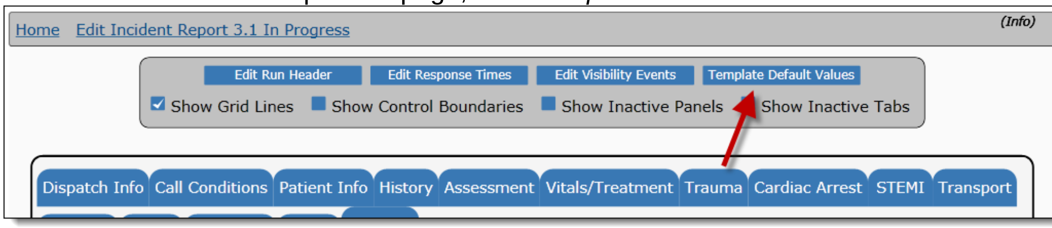
Setting Default Values for a Run Form Template

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

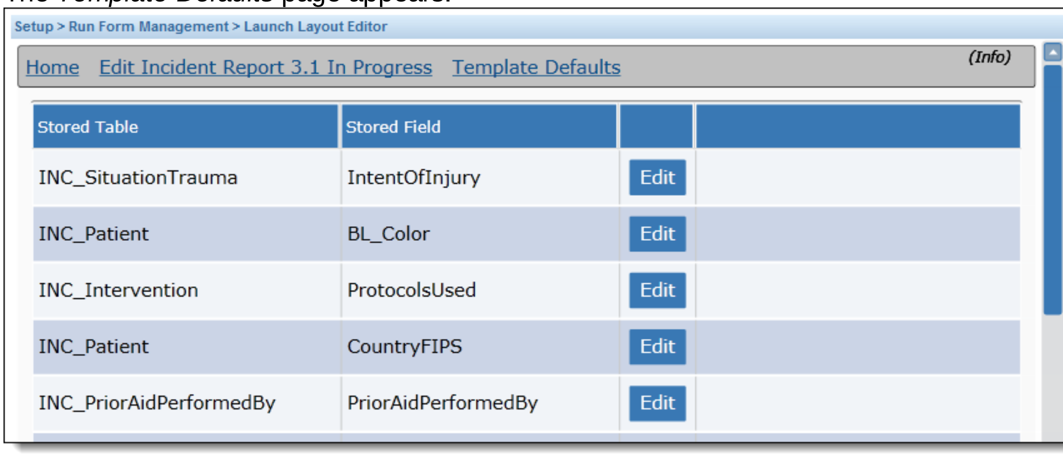
Default values will be automatically selected on run forms using the template that the value was set up in. You can assign default values individually by editing specific fields, or you can set defaults from a list of all fields that can contain default values. This section will examine how to set default 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 114.
2. For the template you want to edit, click the *View Tabs* button.
   A list of tabs for the run form appears.

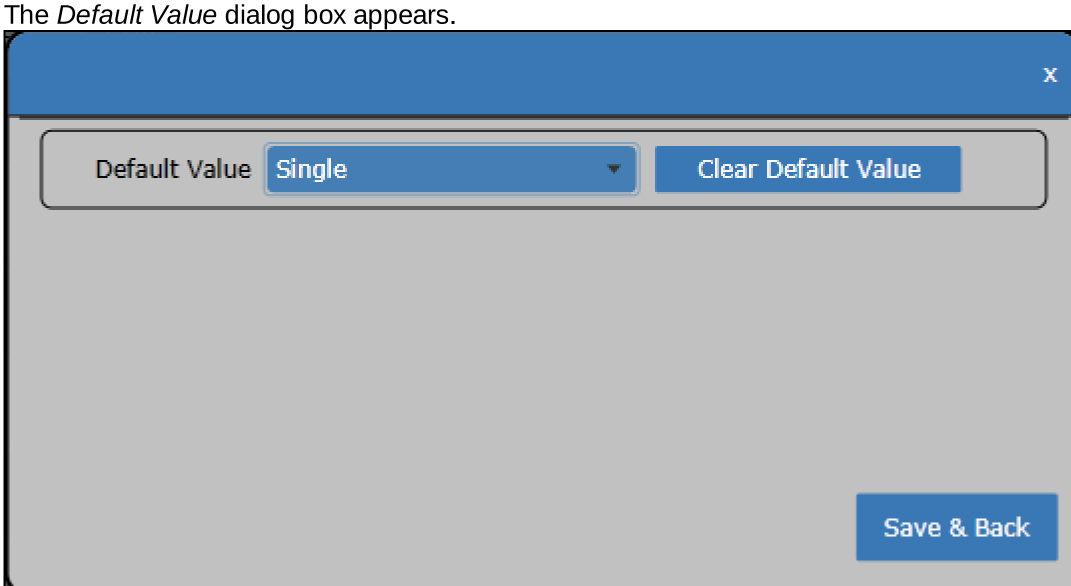
3. From the toolbar at the top of the page, click *Template Default Values.*



The *Template Defaults* page appears.



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



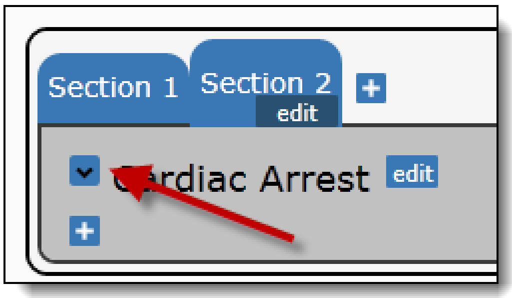
5. Select the desired default value.
   OR
   To remove a default value that is currently assigned, click *Clear Default Value.*
6. When finished, click *Save & Back.*
   The changes are saved.

Hiding a Control with No Data

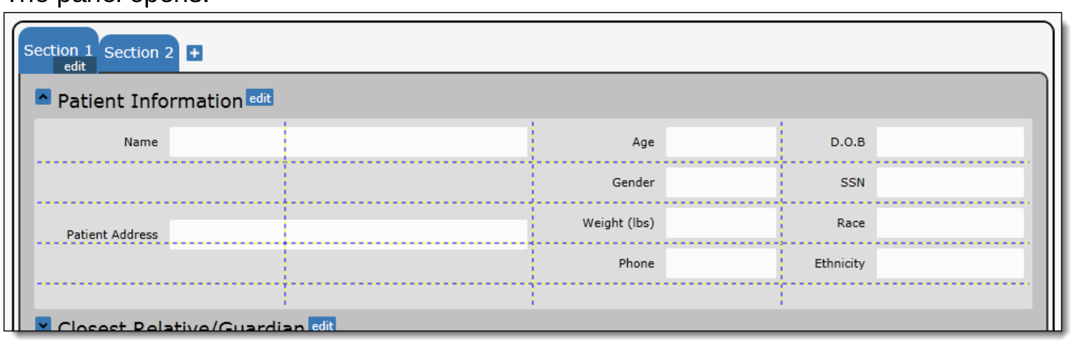
NOTE: This option is available only for controls on PDF report templates.

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.

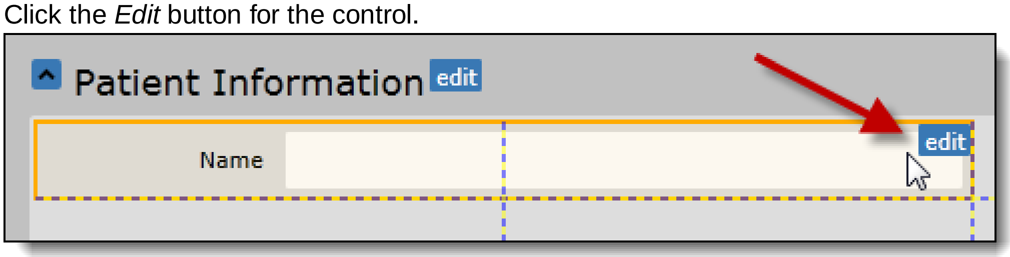
1. Open the PDF Layout Editor.
   HINT: For more information, please refer to the [Opening the Layout Editor](#) section on page 114.
2. For the template you want to add a tab to, click the *View Tabs* button.
   A list of existing tabs for the template appears.
3. Click the tab containing the control 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.

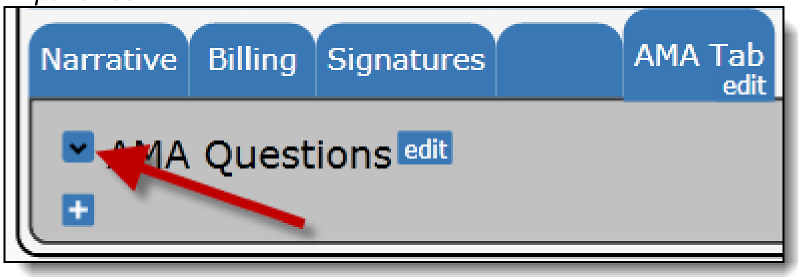
7. To hide this control if there is no appropriate data for the report being printed, select the *Hide Control On Empty Value* checkbox.
8. When finished, click *Save & Back.*
   The changes are saved.

Deleting a Control

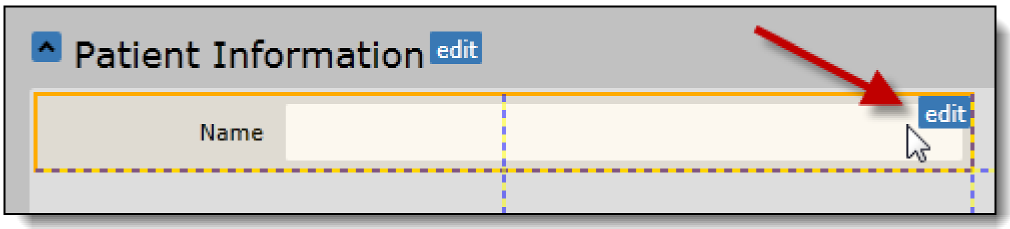
At times, you may need to delete a control in order to replace it with a different one. Be sure to pay attention to validation rules related to any fields you delete, as providers will not be able to complete a run form to 100% if you delete a required field.

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 114.
   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.

3.19 Additional Run Form Template Setup Options

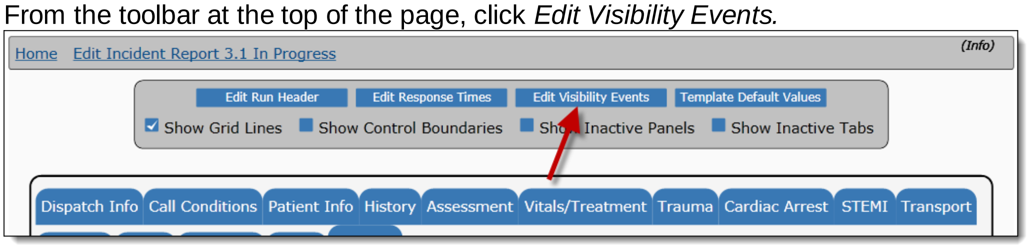
If you are working with the Layout Editor for run forms, you will have additional options for customizing your dynamic run forms. These options are not available when you are working with PDF report templates.

Adding an Event Visibility Rule for a Template

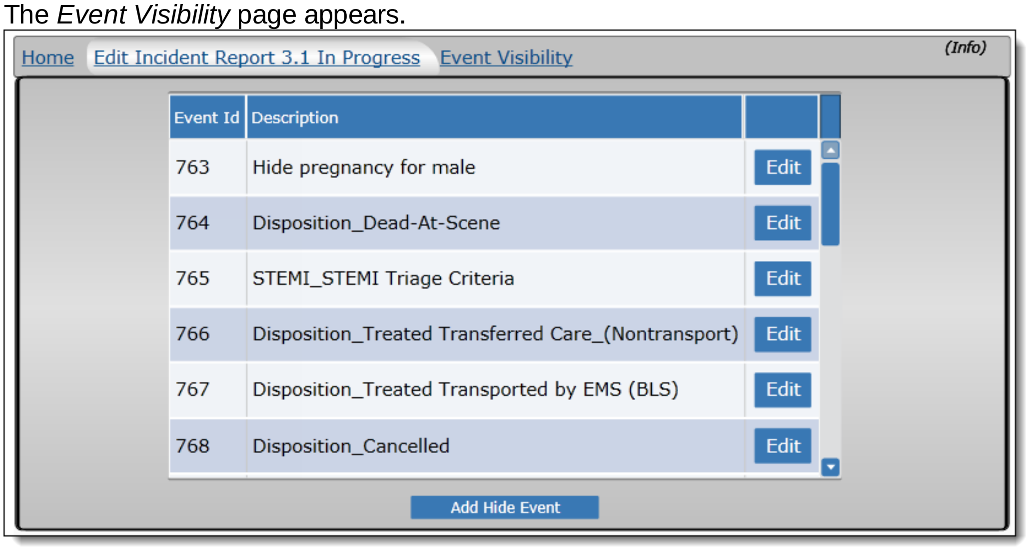
Event visibility rules allow you to show or hide specific parts of the run form template based on data entered into a run form. This reduces the number of unnecessary fields; for example, you could set a visibility event up to hide the *Pregnancy* field if the patient is male. Event visibility rules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

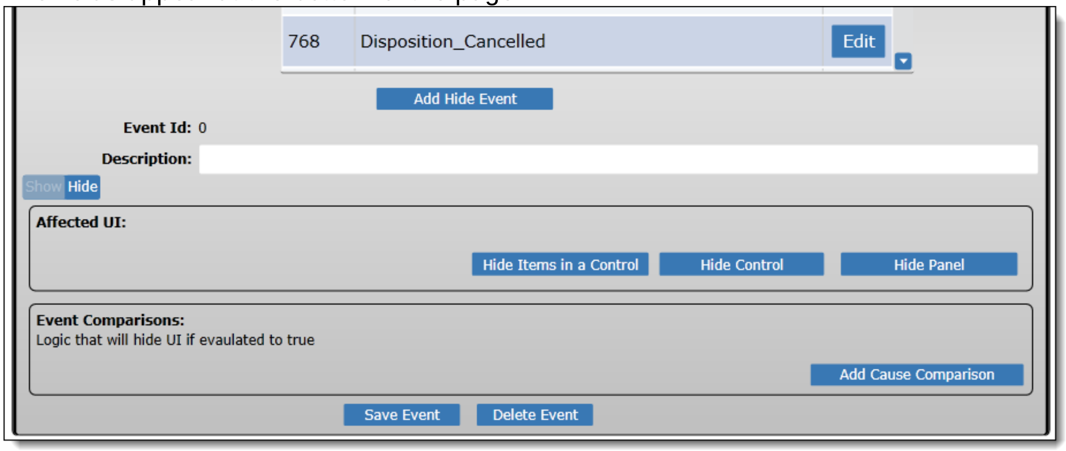
1. Open the Layout Editor.
   The *Layout Editor* page appears.
   HINT: For more information, please refer to the *Opening the Layout Editor* section on page 114.
2. For the template you want to edit, click the *View Tabs* button.
   A list of tabs for the run form appears.
3. From the toolbar at the top of the page, click *Edit Visibility Events.*



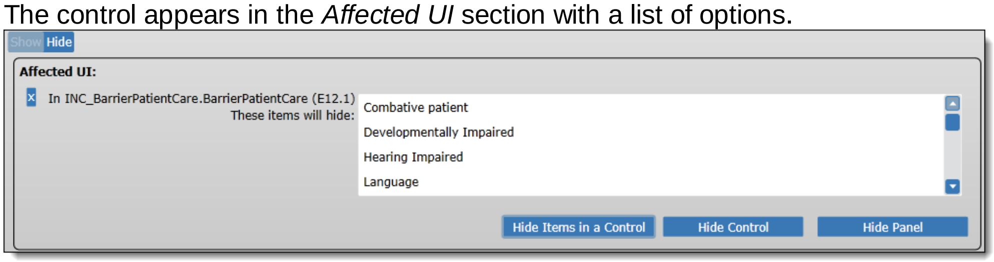
The *Event Visibility* page appears.



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

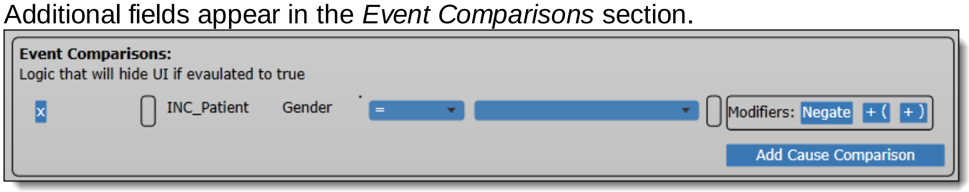


5. In the *Description* text box, type a descriptive name for this event.
   HINT: Providers will never see this name, but it can be a very helpful way to keep track of which visibility event is which in case you need to make changes later. Since the criteria set up with visibility events can become 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.

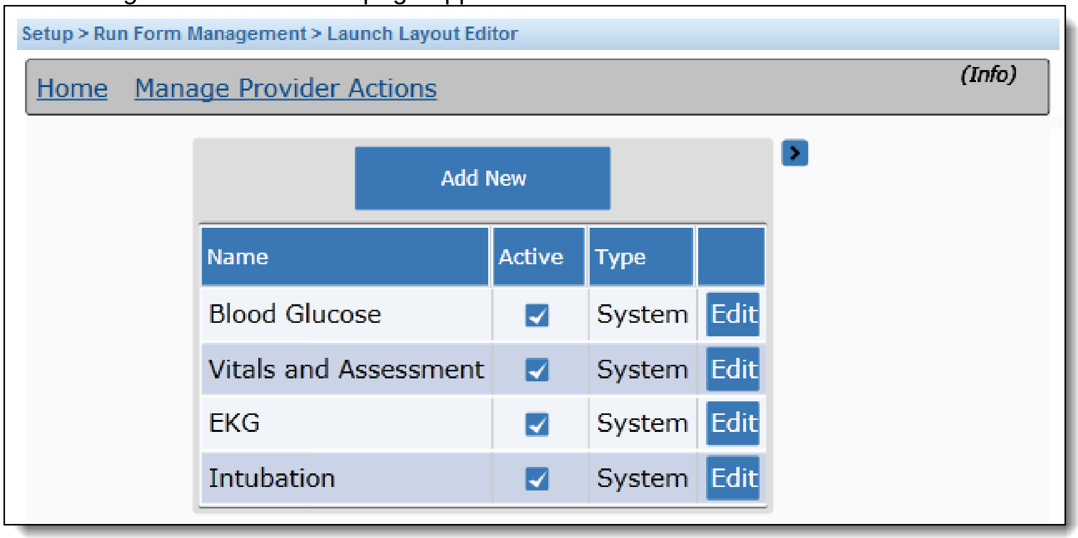
Setting Up Provider Actions

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.

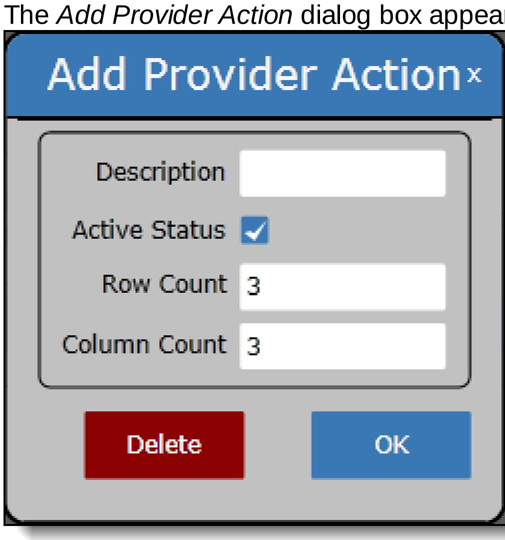
NOTE: In order to use provider actions, you will need to replace the *Activities* grid on your run forms with the *Provider Actions* grid (control ID 1242).

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 114.

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

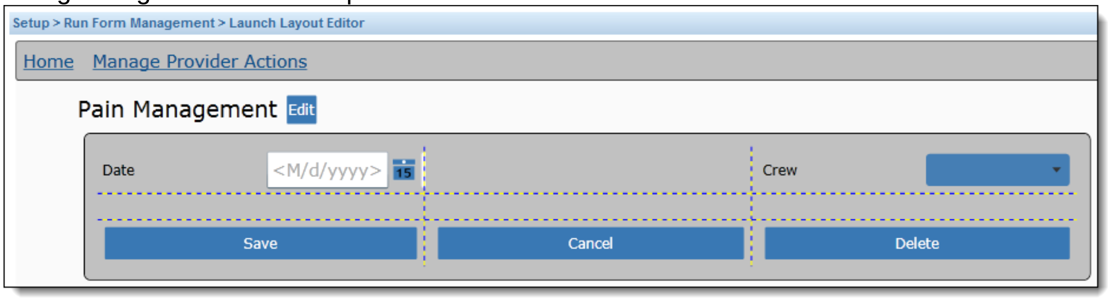


3. Click *Add New.* The *Add Provider Action* dialog box appears.



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.

Setting a Default Template for the Field Bridge

If your agency uses the Field Bridge, you can select a dynamic run form to be used as the default for the Field Bridge. The default template will automatically be used when any user clicks the *Create New Incident* button on the Field Bridge and does not select a template from the list.

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 114.
2. 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.
3. From the *Default Template* drop down menu, select the desired template.
4. Click *OK.*
   The changes are saved and will be applied when Field Bridge systems are next synced.

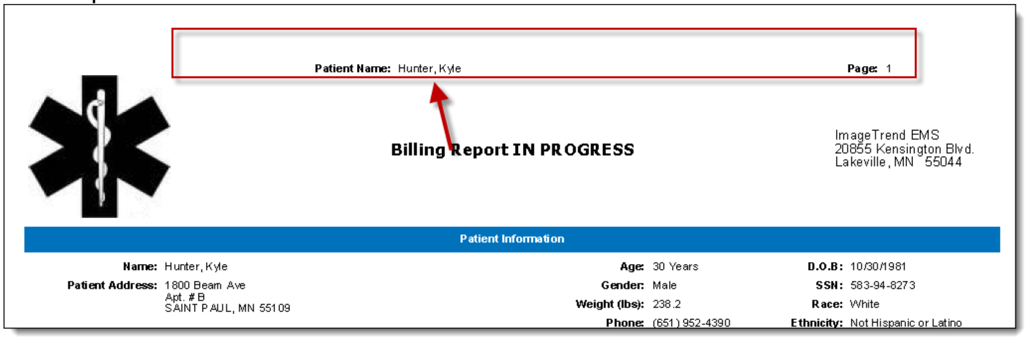
3.20 Additional Report Template Setup Options

If you are working with the PDF Layout Editor, you will have additional options for customizing your PDF reports and QA/QI report templates.

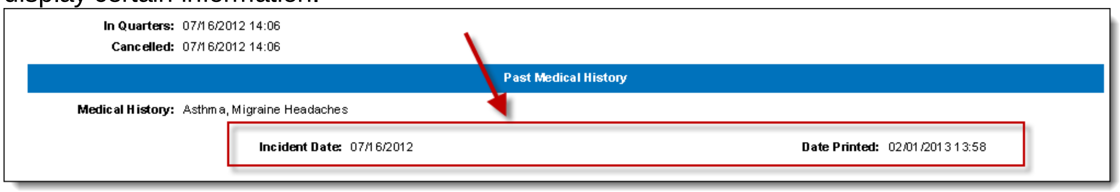
Editing the Header and Footer for your Reports

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.

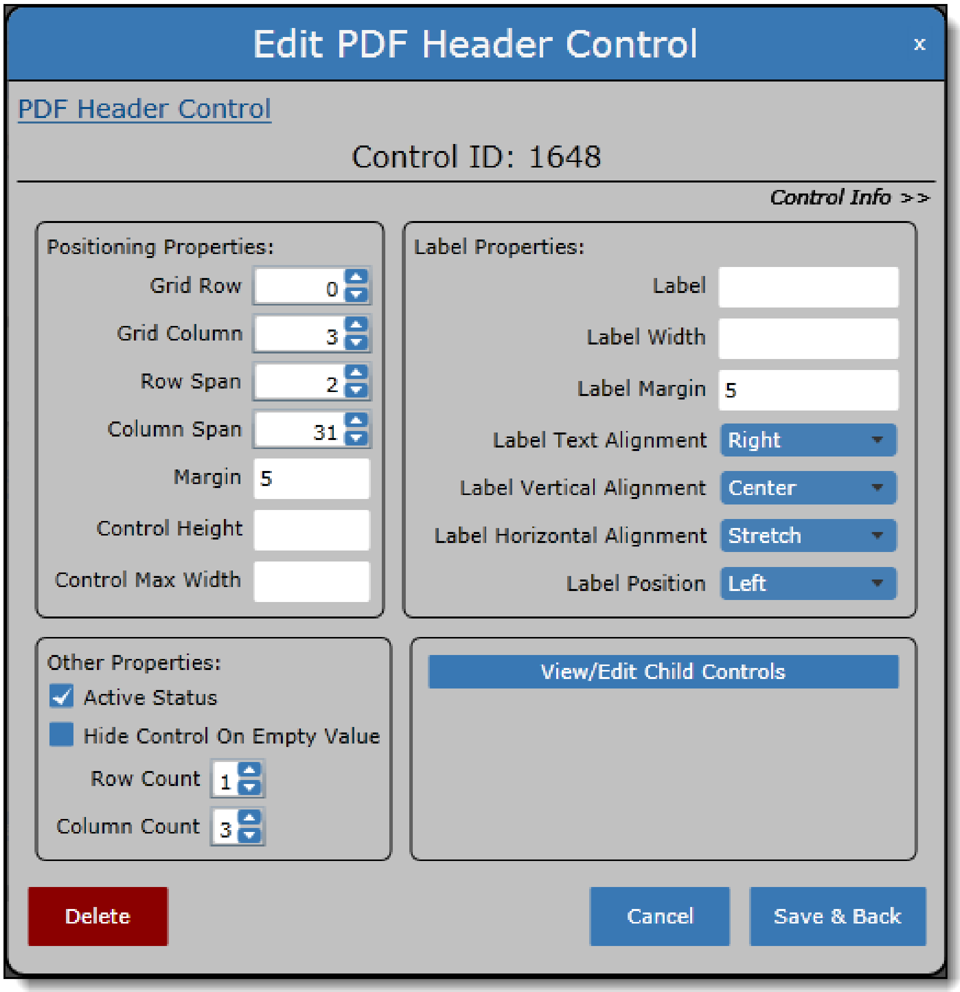


When you begin editing the header and footer, you will see all the same options that you would when editing any control on the run form. Many of these options will not generally be used, although they could be useful for specific situations. Most of the time when editing the header or footer, you will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

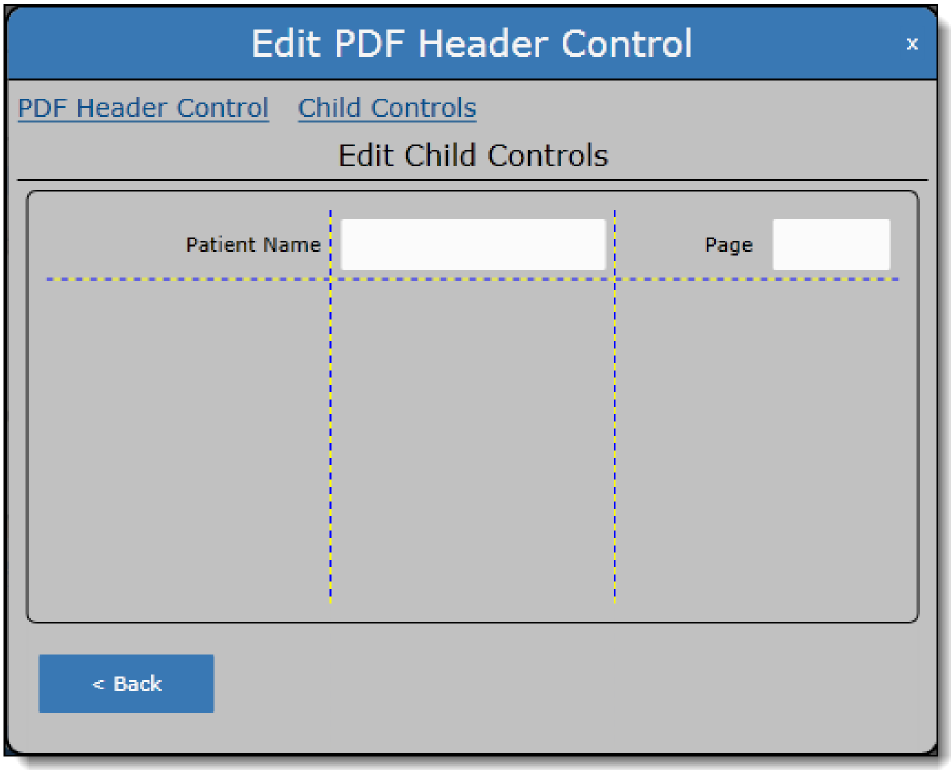
1. Open the PDF Layout Editor.
   HINT: For more information, please refer to the *Opening the Layout Editor* section on page 114.
2. For the report you want to edit the header for, click the *View Tabs* button.
   The *Edit (Report Name)* page appears.
3. From the toolbar at the top of the page, to 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.

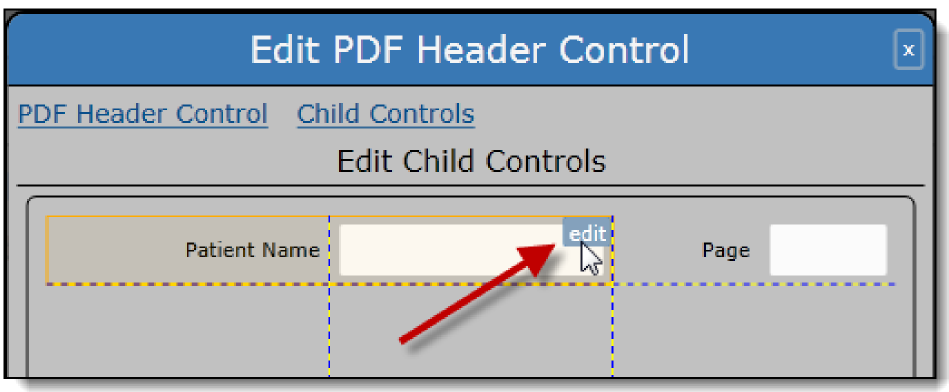


5. To change the number of rows or columns in the header or footer, in the *Row Count* and *Column Count* text boxes at the lower left, enter the desired number of rows and columns.

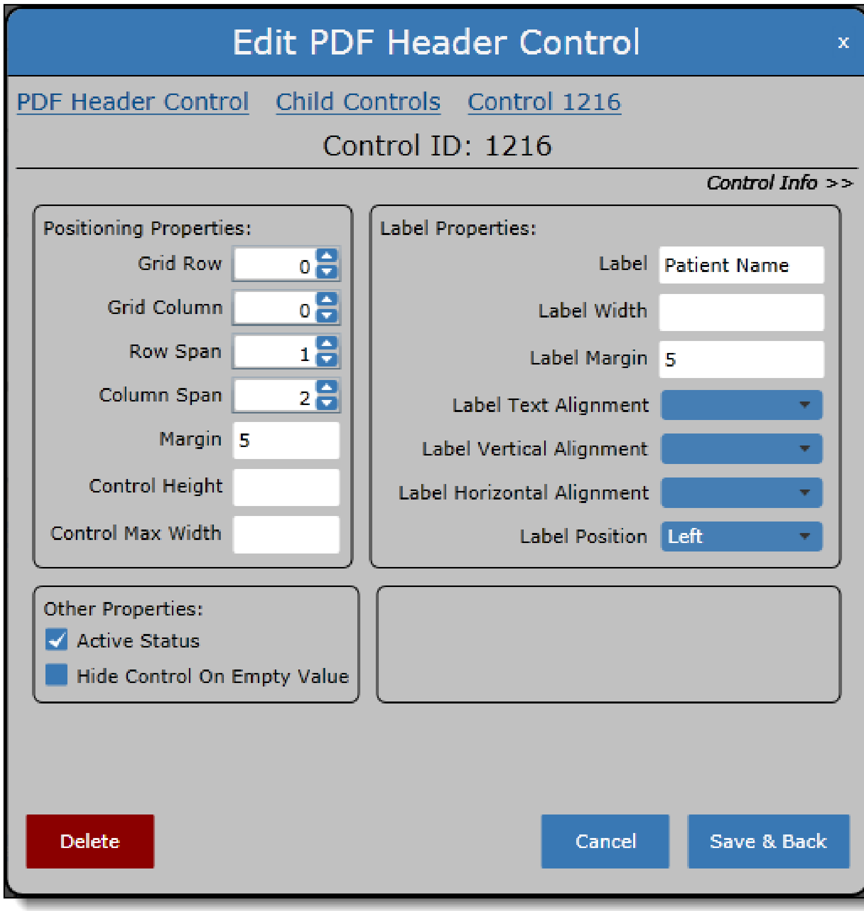
6. To update the controls contained in the header or footer, click *View/Edit Child Controls.* The *Edit Child Controls* page appears.



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.*

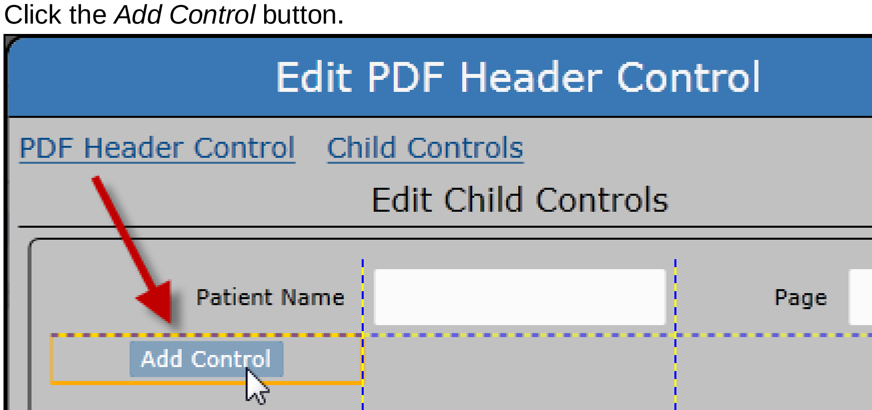
You are returned to the list of child controls.

8. To add a new control to the header or footer,

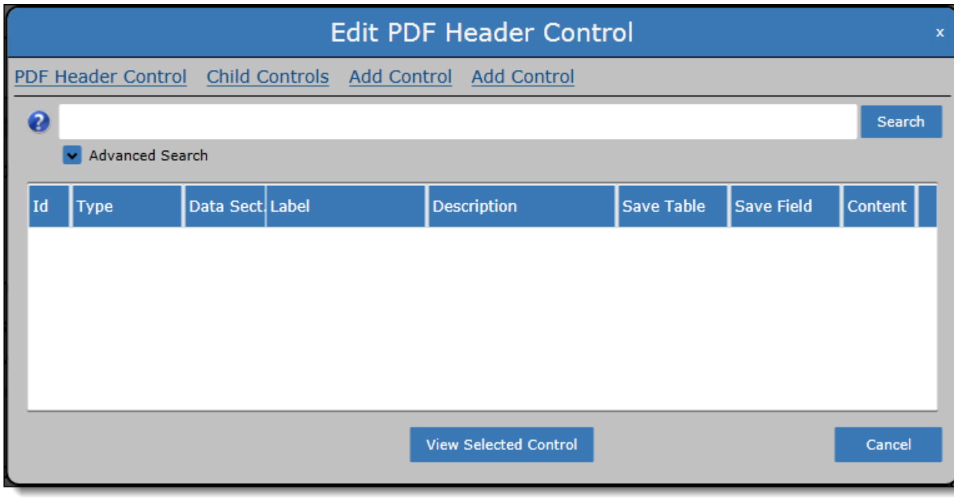
a. Hover your mouse above an empty space in the grid.

The *Add Control* option appears.

b. Click the *Add Control* button.



The *Add Control* page appears.

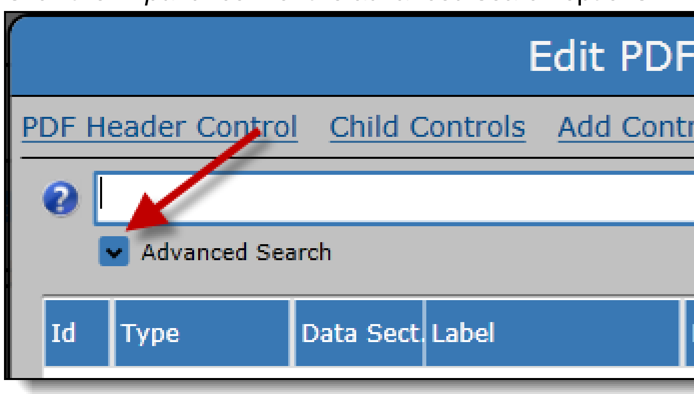


c. In the *Search* text box, type the name or part of the name of the control you want to add.

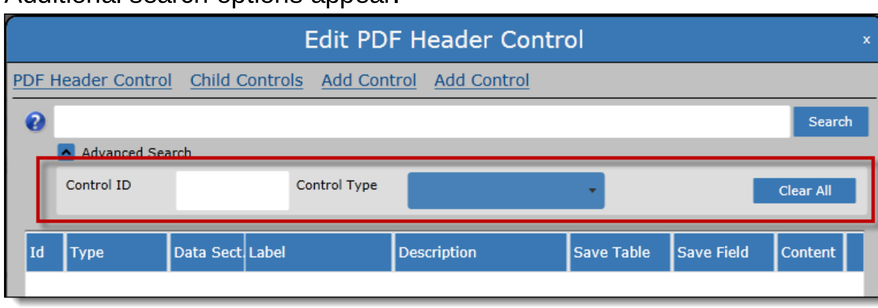
OR

To search by additional options,

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

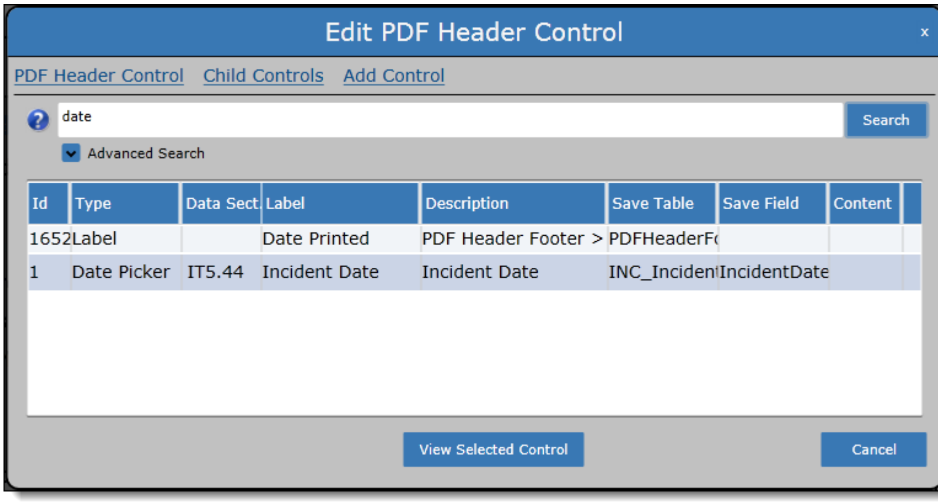


Additional search options appear.



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.



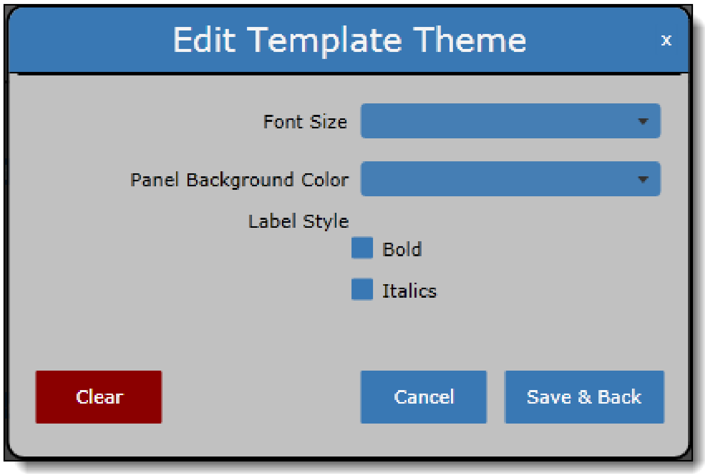
e. Select the control you want to add.
f. Click *View Selected Control.*
A preview of the control you selected appears.
g. To return to your search results, click *Back.*
OR
If this is the correct control, to add it to the selected space on the template, click *Add Control.*
The control is added.

Updating the Display Options for the Template

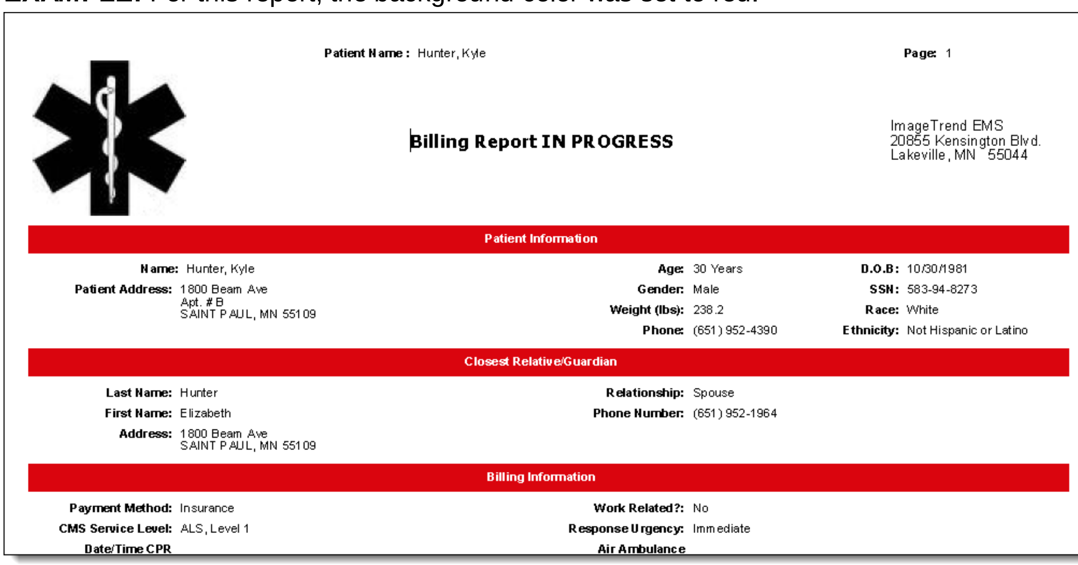
You can update specific display options for any PDF report template or QA/QI report template, including the font size, background color for panels and text style for the labels on controls.

1. Open the PDF Layout Editor.
   HINT: For more information, please refer to the *Opening the Layout Editor* section on page 114.
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.

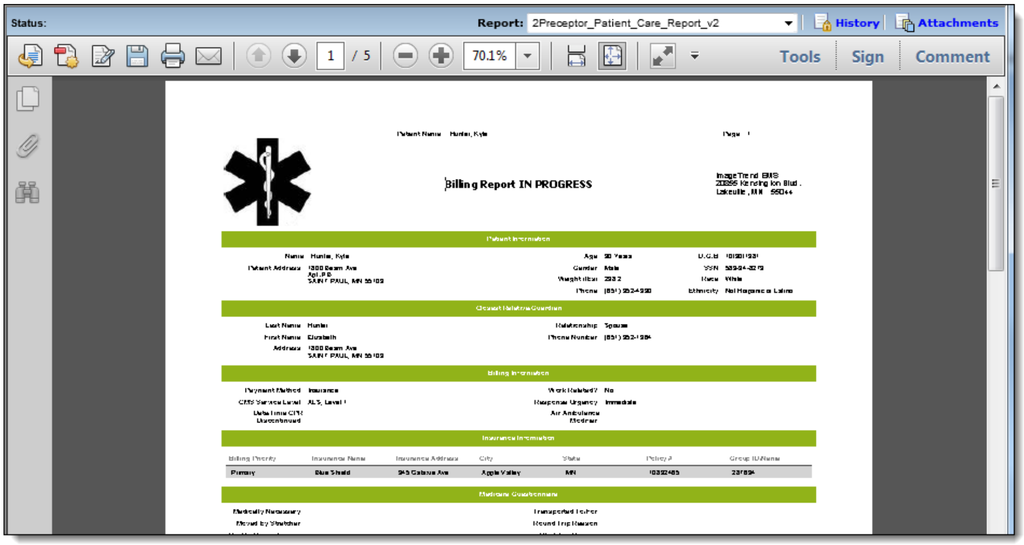


6. From the *Label Style* section, select whether you want the labels for each field to appear as bold or italics.
7. When finished, click *Save & Back.*
   The changes are applied.

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 114.
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 4

WORKING WITH TRAINING INFORMATION FOR SERVICES

4.1 Chapter Overview

This chapter provides an overview of the options available to service administrators for training, including information about setting up categories, templates, topics, time calculation options and individual training records.

Options for setting up categories, templates and topics may not always be available to you at the service level, depending on the permissions settings for your system. If these options are available, you may see some options that are already set up at the system level. You will not be able to edit system level items, but you can add your own items for your service.

4.2 Working with Training Categories

Categories allow administrators to sort templates based on the type of training for better organization. Administrators can create several levels of categories (e.g., a category for field work courses could be created under a main category of fire inspector coursework).

Options for setting up categories may not be available to you at the service level, depending on the permissions settings for your system. If these options are available, you may see some categories that are already set up at the system level. You will not be able to edit system level items, but you can add your own categories for your service and you can mark system categories that your service does not use as inactive.

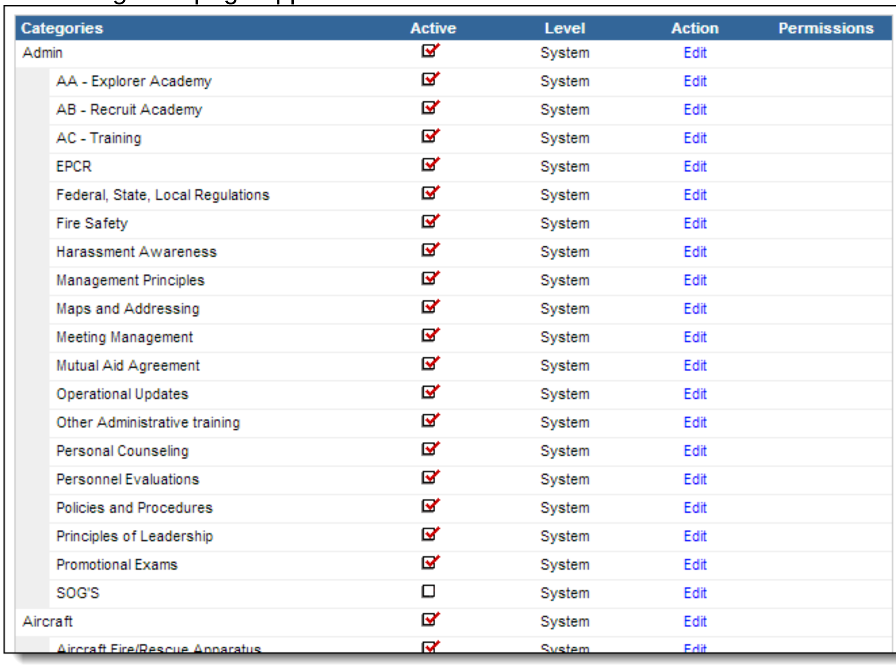
Viewing and Editing Categories

When editing a category that has subcategories, the sub-categories must be removed before editing is possible. Subcategories will appear below and slightly indented from their parent category. The *Manage Categories* page will display a list of categories and sub-categories, information about whether the category is active in the system or not.

Keep in mind that for service administrators working with system categories, you will only be able to change their status between being active or inactive.

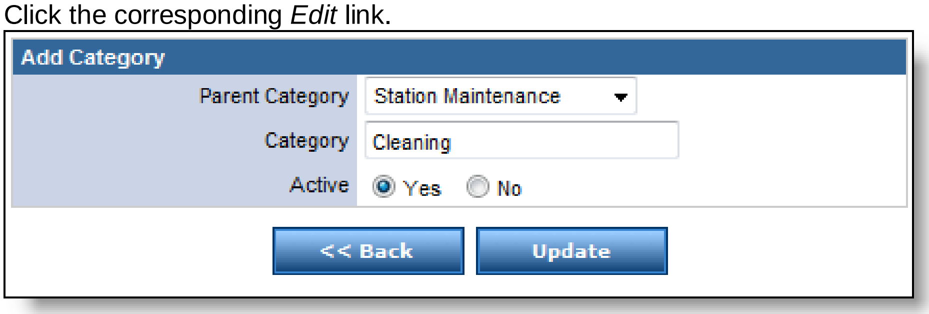
1. From the upper right, click *My Service.*
2. Under *Service Settings And Resources,* click *Activities and Training.*
   A sub-menu appears.

3. Under *Activities and Training,* click *Categories.*
   The *Categories* page appears.



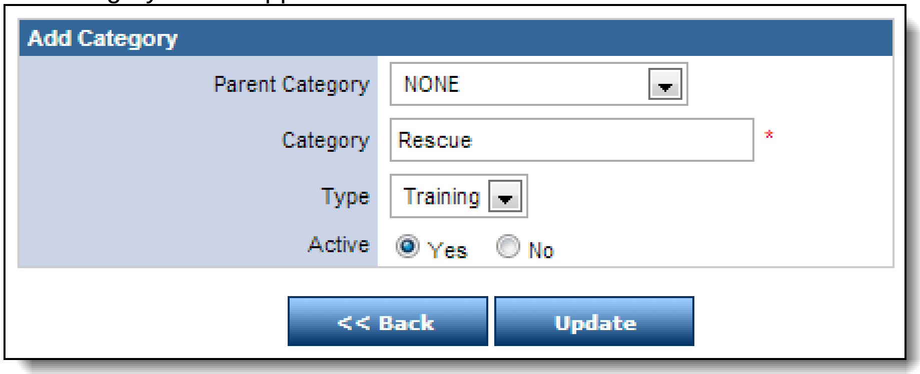
Categories	Active	Level	Action	Permissions
Admin	☑	System	Edit	
AA - Explorer Academy	☑	System	Edit	
AB - Recruit Academy	☑	System	Edit	
AC - Training	☑	System	Edit	
EPCR	☑	System	Edit	
Federal, State, Local Regulations	☑	System	Edit	
Fire Safety	☑	System	Edit	
Harassment Awareness	☑	System	Edit	
Management Principles	☑	System	Edit	
Maps and Addressing	☑	System	Edit	
Meeting Management	☑	System	Edit	
Mutual Aid Agreement	☑	System	Edit	
Operational Updates	☑	System	Edit	
Other Administrative training	☑	System	Edit	
Personal Counseling	☑	System	Edit	
Personnel Evaluations	☑	System	Edit	
Policies and Procedures	☑	System	Edit	
Principles of Leadership	☑	System	Edit	
Promotional Exams	☑	System	Edit	
SOG'S	☐	System	Edit	
Aircraft	☑	System	Edit	
Aircraft Fire/Rescue Apparatus	☑	System	Edit	

4. To edit a sub-category,
   a. Click the corresponding *Edit* link.



   b. Using the provided fields, make the desired changes.
      NOTE:
      Changing the parent category will move this sub-category to another main category.
      Changing the text in the *Category* field will change the name of the category.
      Changing the *Active* status will change whether the category can be used in the system or not.
   c. When finished, to keep the changes, click *Update.*
      To return to the list of categories without editing, click *Back.*
5. To edit a parent category,
   a. Edit all sub-categories and move them to another parent category.

b. For the category, click *Edit.*
   The category details appear.



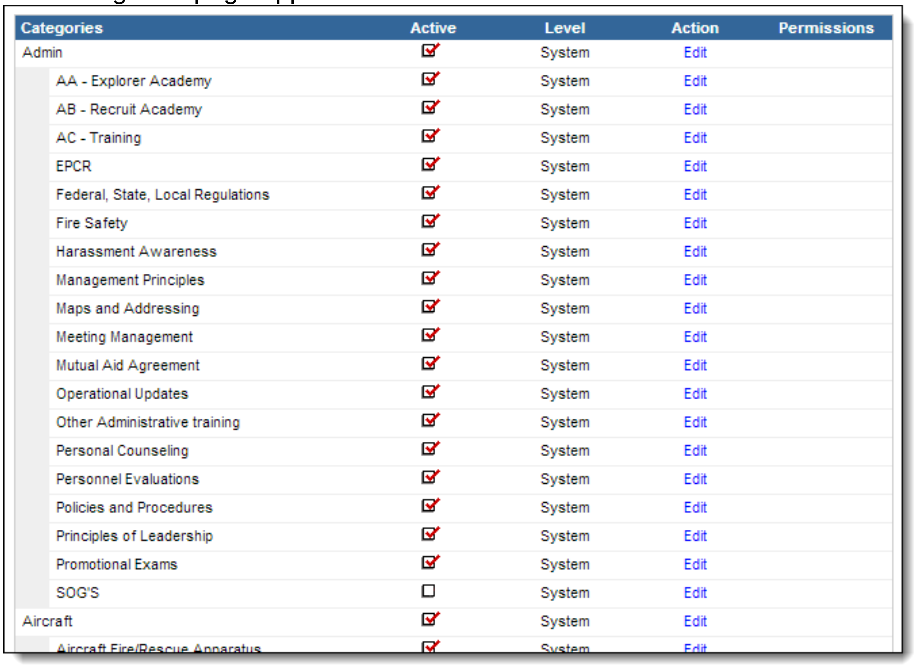
c. If this category will remain a parent category, from the *Parent Category* drop down menu, select *NONE.*
   If this category will become a sub-category, from the *Parent Category* drop down menu, select the desired parent category.
d. In the *Category* text field, make any changes to the category name.
e. From the *Type* drop down menu, select whether this category should apply to activities or training records.
f. In the *Active* section, select whether this category should be available for use in the system or unavailable but stored if necessary.
g. When finished, to keep the changes, click *Update.*
   To return to the list of categories without editing, click *Back.*

Adding Categories

Administrators can create new parent categories and sub-categories.

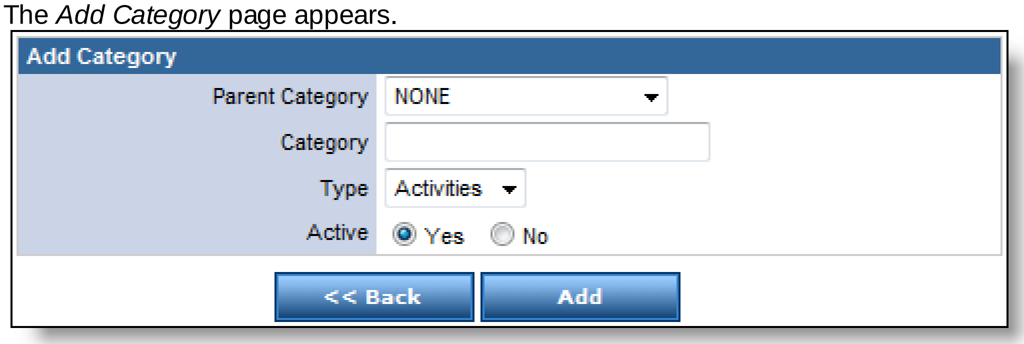
1. From the upper right, click *My Service.*
2. Under *Service Settings And Resources,* click *Activities and Training.*
   A sub-menu appears.

3. Under *Activities and Training,* click *Categories.*
   The *Categories* page appears.



Categories	Active	Level	Action	Permissions
Admin	☑	System	Edit	
AA - Explorer Academy	☑	System	Edit	
AB - Recruit Academy	☑	System	Edit	
AC - Training	☑	System	Edit	
EPCR	☑	System	Edit	
Federal, State, Local Regulations	☑	System	Edit	
Fire Safety	☑	System	Edit	
Harassment Awareness	☑	System	Edit	
Management Principles	☑	System	Edit	
Maps and Addressing	☑	System	Edit	
Meeting Management	☑	System	Edit	
Mutual Aid Agreement	☑	System	Edit	
Operational Updates	☑	System	Edit	
Other Administrative training	☑	System	Edit	
Personal Counseling	☑	System	Edit	
Personnel Evaluations	☑	System	Edit	
Policies and Procedures	☑	System	Edit	
Principles of Leadership	☑	System	Edit	
Promotional Exams	☑	System	Edit	
SOG'S	☐	System	Edit	
Aircraft	☑	System	Edit	
Aircraft Fire/Rescue Apparatus	☑	System	Edit	

4. Click *Add Training Category* or *Add Activities Category,* as appropriate.
   The *Add Category* page appears.



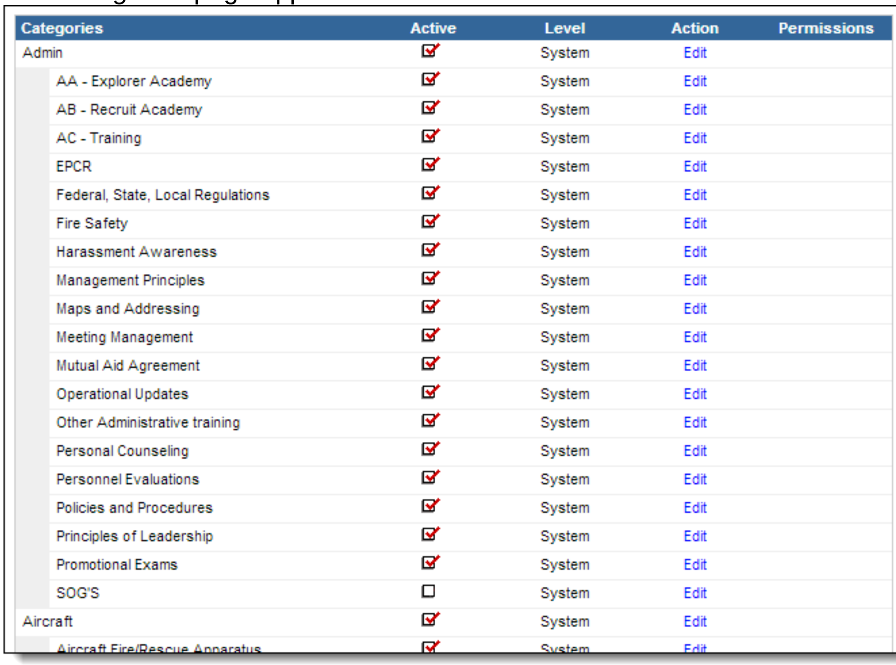
5. From the *Parent Category* drop down menu, select the desired option.
   HINT: If the new category will be a parent category, select *NONE.* If the new category will be a sub-category, select the category under which it should stored.
6. In the *Category* text box, type the name of the category.
7. From the *Type* drop down menu, select whether the category should be used for activities or training.
8. In the *Active* section, select whether this category should be available for use (*Yes*)or stored for future use or reference (*No*).
9. When finished, to save the category, click *Add.*
   To return to the list of categories without saving, click *Back.*

Setting Access to Categories

You will be able to control which permission groups will have access to categories and to templates within this category.

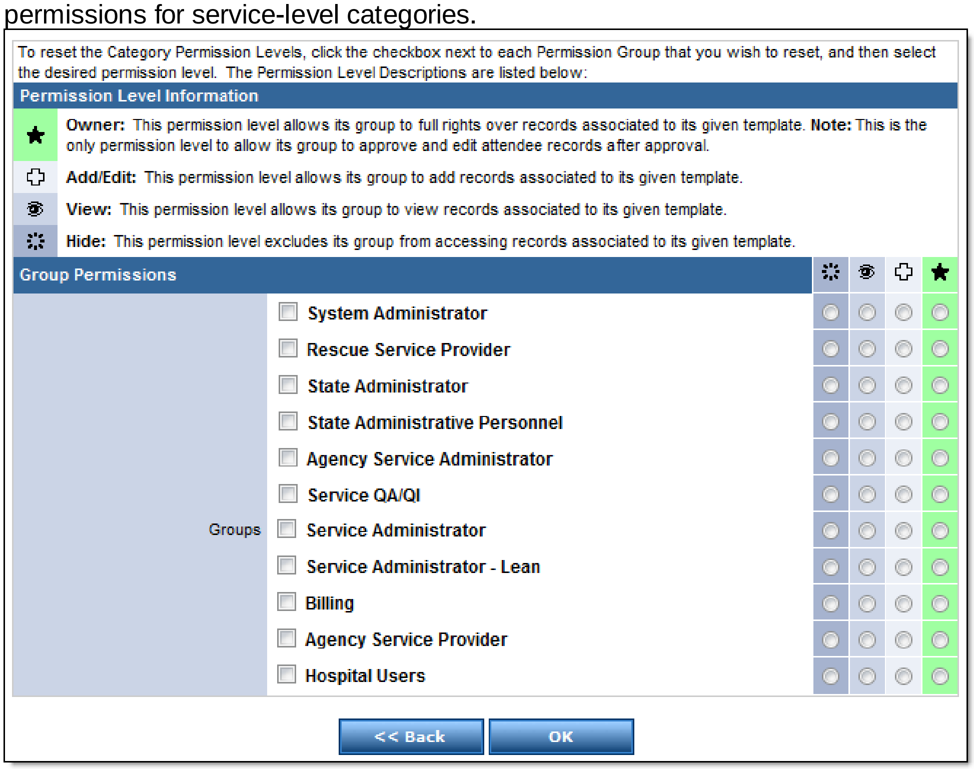
1. From the upper right, click *My Service.*
2. Under *Service Settings And Resources,* click *Activities and Training.*
   A sub-menu appears.

3. Under *Activities and Training,* click *Categories.*
   The *Categories* page appears.



Categories	Active	Level	Action	Permissions
Admin	☑	System	Edit	
AA - Explorer Academy	☑	System	Edit	
AB - Recruit Academy	☑	System	Edit	
AC - Training	☑	System	Edit	
EPCR	☑	System	Edit	
Federal, State, Local Regulations	☑	System	Edit	
Fire Safety	☑	System	Edit	
Harassment Awareness	☑	System	Edit	
Management Principles	☑	System	Edit	
Maps and Addressing	☑	System	Edit	
Meeting Management	☑	System	Edit	
Mutual Aid Agreement	☑	System	Edit	
Operational Updates	☑	System	Edit	
Other Administrative training	☑	System	Edit	
Personal Counseling	☑	System	Edit	
Personnel Evaluations	☑	System	Edit	
Policies and Procedures	☑	System	Edit	
Principles of Leadership	☑	System	Edit	
Promotional Exams	☑	System	Edit	
SOG'S	☐	System	Edit	
Aircraft	☑	System	Edit	
Aircraft Fire/Rescue Apparatus	☑	System	Edit	

4. Click the *Permissions* icon for the desired category.
   The *Permissions* page appears.
   NOTE: If you are working at a service level, you will only have the ability to update permissions for service-level categories.



5. To change a specific permission group's access to this category,
   a. Select the checkbox for the desired category.
   b. Select the desired level of access.

c. Click *OK.*

4.3 Working with Templates

Each training record that is added to the system must be based off a template, which will contain most of the information for that record. This information will be copied to the individual record, although based on the permissions the administrator sets some information may be editable in each record created from the template. Administrators can edit existing templates or create new ones.

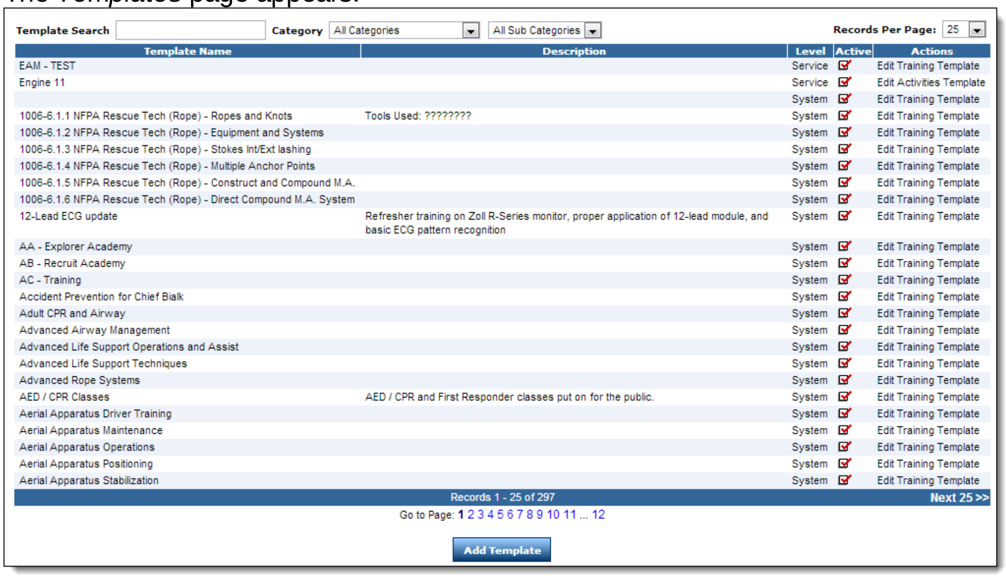
Options for setting up templates may not be available to you at the service level, depending on the permissions settings for your system. If these options are available, you may see some templates that are already set up at the system level. You will not be able to edit system level items, but you can add your own templates for your service and you can mark system templates that your service does not use as inactive.

Adding New Templates

Administrators can set up new templates for training records for your service or (for system administrators) for all services in your system.

When you create a new training template, you can assign permissions to each section of that template. If you choose to hide a section, that information will not be displayed for any trainings created from the template. If you choose *View* permissions for a section, that section will be read-only and so will be the same for all trainings created from this template. If you choose *Add/Edit* permissions for a section, that information can be added or changed for each individual training created from the template.

1. From the upper right, click *My Service.*
2. Click *Setup.*
3. Under *Service Settings And Resources,* click *Activities and Training.*
   A sub-menu appears.
4. Under *Activities and Training,* click *Templates.*
   The *Templates* page appears.


Template Search | Category: All Categories | All Sub Categories | Records Per Page: 25

Template Name	Description	Level	Active	Actions
EAM - TEST		Service		Edit Training Template
Engine 11		Service		Edit Activities Template
		System		Edit Training Template
1006-6.1.1 NFPA Rescue Tech (Rope) - Ropes and Knots	Tools Used: ????????	System		Edit Training Template
1006-6.1.2 NFPA Rescue Tech (Rope) - Equipment and Systems		System		Edit Training Template
1006-6.1.3 NFPA Rescue Tech (Rope) - Stokes Int/Ext lashing		System		Edit Training Template
1006-6.1.4 NFPA Rescue Tech (Rope) - Multiple Anchor Points		System		Edit Training Template
1006-6.1.5 NFPA Rescue Tech (Rope) - Construct and Compound M.A.		System		Edit Training Template
1006-6.1.6 NFPA Rescue Tech (Rope) - Direct Compound M.A. System		System		Edit Training Template
12-Lead ECG update	Refresher training on Zoll R-Series monitor, proper application of 12-lead module, and basic ECG pattern recognition	System		Edit Training Template
AA - Explorer Academy		System		Edit Training Template
AB - Recruit Academy		System		Edit Training Template
AC - Training		System		Edit Training Template
Accident Prevention for Chief Bialk		System		Edit Training Template
Adult CPR and Airway		System		Edit Training Template
Advanced Airway Management		System		Edit Training Template
Advanced Life Support Operations and Assist		System		Edit Training Template
Advanced Life Support Techniques		System		Edit Training Template
Advanced Rope Systems		System		Edit Training Template
AED / CPR Classes	AED / CPR and First Responder classes put on for the public.	System		Edit Training Template
Aerial Apparatus Driver Training		System		Edit Training Template
Aerial Apparatus Maintenance		System		Edit Training Template
Aerial Apparatus Operations		System		Edit Training Template
Aerial Apparatus Positioning		System		Edit Training Template
Aerial Apparatus Stabilization		System		Edit Training Template

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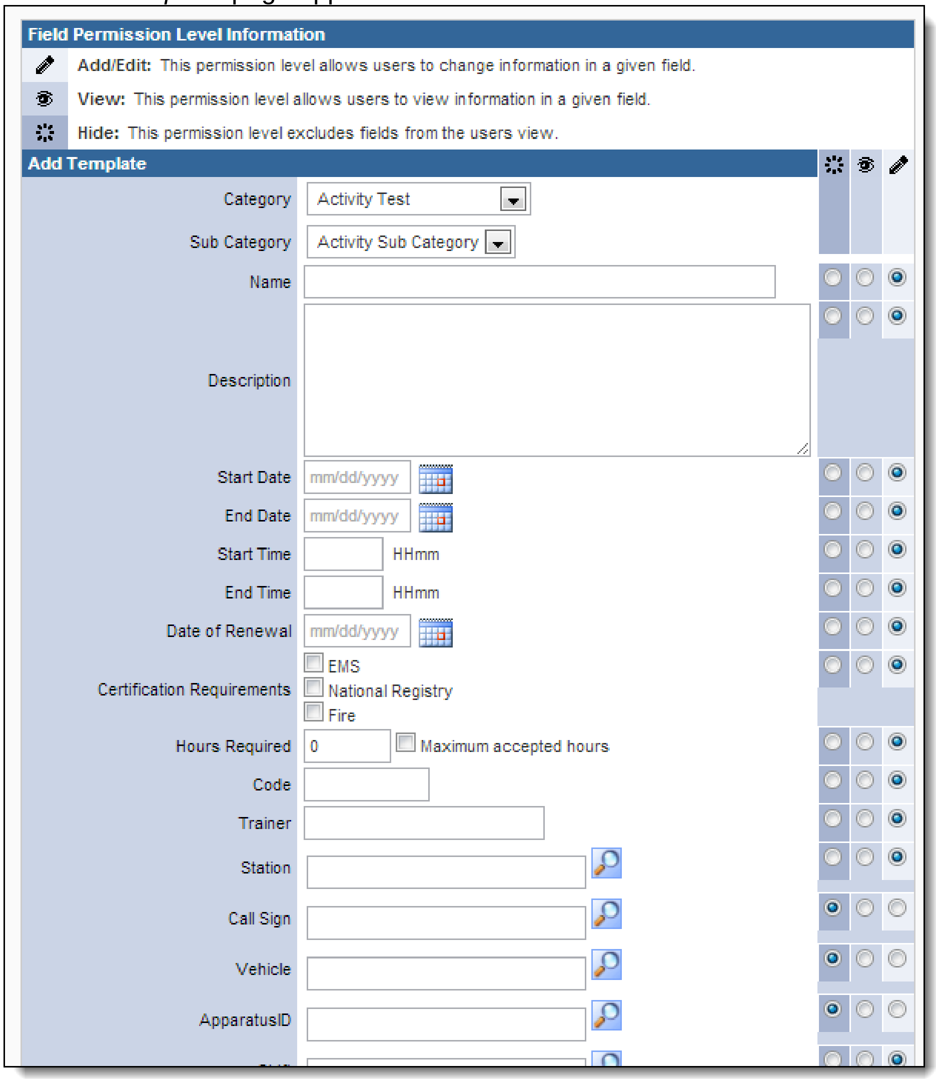
Add Template

5. Click *Add Template.*
   The *Add Template* page appears.



6. To designate access to each aspect of the template when records are created from it, select the correct level of permission for each aspect.
   NOTE: This will select whether this information will be available to view or edit when individual records are created.
7. To select which user groups will be able to make changes to the template or records created from the template, in the *Group Permissions* section, select the desired permissions for each group.
   NOTE: When permissions differ between group permissions and permissions for individual elements of the template, the lower level of permission will be applied.
8. From the *Category* and *Sub-Category* drop down menus, select the category and sub-category trainings/activities created from this template should be assigned to.
9. In the *Name* text box, type a name for trainings/activities created from this template.
10. In the *Description* text box, type any additional details about the trainings/activities.
11. In the *Start Date* and *End Date* text boxes, type the dates that trainings/activities created from this template should start and end.
    OR

    To select the date(s) from a calendar, click the *Calendar* icon and select the desired date.

HINT: For most templates, these fields are left blank and the permissions are set to *Add/Edit* so that the correct dates can be filled in for each individual training or activity record.

12. In the *Start Time* and *End Time* text boxes, type the times that trainings/activities created from this template should start and end.

    HINT: For most templates, these fields are left blank and the permissions are set to *Add/Edit* so that the correct dates can be filled in for each individual training or activity record.

13. In the *Date of Renewal* text box, type the date that trainings or activities based on this template will need to be renewed.

    OR

    To select the date from a calendar, click the *Calendar* icon and select the desired date.

    HINT: For most templates, this field is left blank and the permissions are set to *Add/Edit* so that the correct date can be filled in for each individual training or activity record.

14. In the *Certification Requirements* section, select the checkbox(es) for any certifications that trainings or activities created from this template will meet.
15. In the *Hours Required* text box, type the number of hours trainings or activities created from this template will be held for.
16. If the number of hours entered as required is the maximum number of hours allowed, select the *Maximum accepted hours* checkbox.
17. In the *Code* text box, type the code to be associated with any training or activity created from this template.
18. In the *Trainer* text box, type the name of the trainer who will be in charge of trainings or activities created from this template.
19. In the *Station, Call Sign, Vehicle, ApparatusID* and *Shift* text boxes, type the appropriate information to be associated with trainings or activities created from this template.

    OR

    To look the information up from the options that are set up for your service, click the *Look up* icon and select the appropriate option.

20. In the *Total Attendees* text box, type the number of attendees to be associated with any training or activity created from this template.
21. In the *Attendance Mandatory* section, select whether attendance for trainings and activities created from this template will be mandatory.
22. In the *Location* text box, type the location that should be assigned to any trainings or activities created from this template.
23. To add training certifications that trainings or activities created from this template will count towards,
    a. In the *Training Certifications* section, from the *Available* scroll list, select the desired certification(s).

       HINT: To select multiple options at the same time, press and hold the *Ctrl* key while clicking each desired option.

    b. Click the *Add* icon >.
24. To add training topics that trainings or activities created from this template will address,
    a. In the *Training Topics* section, from the *Available* scroll list, select the desired topic(s).

       HINT: To select multiple options at the same time, press and hold the *Ctrl* key while clicking each desired option.

    b. Click the *Add* icon >.

25. In the *ID to Display* section, select whether you want the payroll ID or the personnel ID for attendees of trainings or activities created from this template to be displayed.
26. In the *Active* section, select whether you want this template to be active and available for creating individual records from, or inactive and saved for reference only.
27. To set default values that will be applied to attendees who are assigned to trainings or activities created from this template,

    HINT: You may not use all these options, depending on what information your service tracks for attendees of training and activities and how much of this information you want to set up manually for each training/activity or even each attendee.

    a. In the *Approval Status* section, select whether attendees should be automatically marked as approved or pending.
    b. In the *Hours/Days* value, type the maximum number of hours or days that is allowable for attendees.
    c. In the *Hours Attended* text box, type the number of hours that should be assigned by default.
    d. In the *Score* text box, type any score that should be assigned by default.
    e. In the *Time Attended* section, select the beginning and ending time that should be assigned to attendees by default.
    f. In the *Paid* section, select whether attendees of trainings and activities created from this template should be paid by default.
    g. If you chose for attendees to be paid, from the *Pay Rate* drop down menu, select the pay rate for attendees.
    h. In the *Pass/Fail* section, select whether attendees should be marked as passing or failing by default for trainings or activities created from this template.
    i. To set positions for this training,
        i. In the *Positions* section, from the *Available* scroll list, select the desired position(s).

            HINT: To select multiple options at the same time, press and hold the *Ctrl* key while clicking each desired option.

        ii. Click the *Add* icon >.
28. To set the level of access that each permission group will have to individual templates and activities created from this record, for each group, select the appropriate level of permissions.

Owner

Groups with this permission level will have full control over training and activity records created from this template.

NOTE: In order for someone to edit attendee records and mark them as approved or pending, they must have Owner level rights to the template.

Add/Edit

Groups with this permission level will be able to add new trainings or activities based on this template and will be able to edit those records, but will not be able to approve or edit attendee records.

View

Groups with this permission level will be able to view training and activity records created from this template but will not be able to change or add them.

Hide

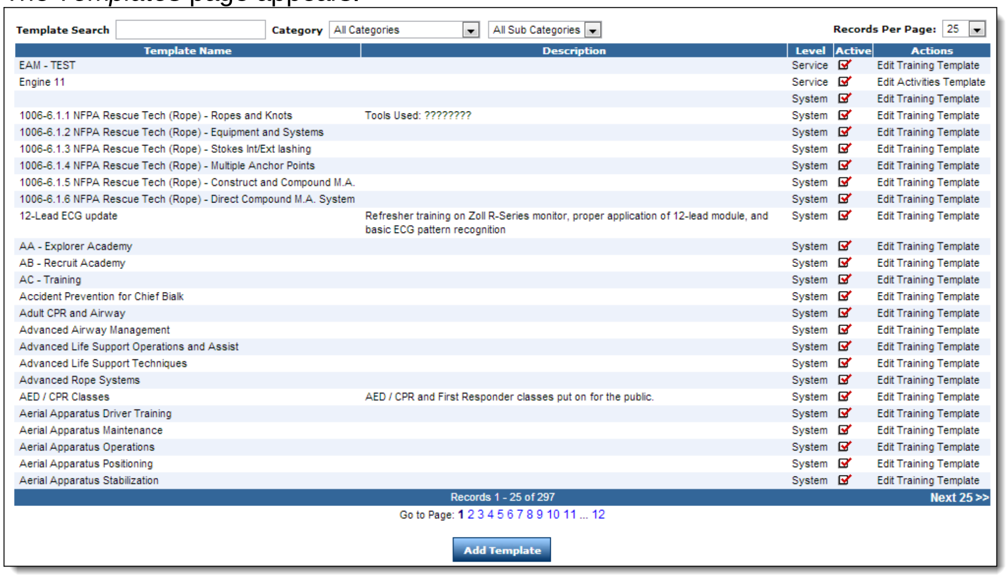
This permission level will hide any training and activity records created from this template.

29. When finished, to keep the template, click *OK.*
    To return to the list of templates without saving, click *Back.*

Viewing and Editing Templates

Administrators can view detailed information about a template and make any changes. Changes can be made to information about the template itself (e.g., the name and category, time and date or certifications fulfilled) and the permissions access to the template (i.e., what information can be changed when creating an individual record from the template and who can edit the template).

1. From the upper right, click *My Service.*
2. Under *Service Settings And Resources,* click *Activities and Training.*
   A sub-menu appears.
3. Under *Activities and Training,* click *Templates.*
   The *Templates* page appears.



Template Search | Category: All Categories | All Sub Categories | Records Per Page: 25

Template Name	Description	Level	Active	Actions
EAM - TEST		Service	☑	Edit Training Template
Engine 11		Service	☑	Edit Activities Template
		System	☑	Edit Training Template
1006-6.1.1 NFPA Rescue Tech (Rope) - Ropes and Knots	Tools Used: ????????	System	☑	Edit Training Template
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1006-6.1.3 NFPA Rescue Tech (Rope) - Stokes Int/Ext lashing		System	☑	Edit Training Template
1006-6.1.4 NFPA Rescue Tech (Rope) - Multiple Anchor Points		System	☑	Edit Training Template
1006-6.1.5 NFPA Rescue Tech (Rope) - Construct and Compound M.A.		System	☑	Edit Training Template
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AC - Training		System	☑	Edit Training Template
Accident Prevention for Chief Bialk		System	☑	Edit Training Template
Adult CPR and Airway		System	☑	Edit Training Template
Advanced Airway Management		System	☑	Edit Training Template
Advanced Life Support Operations and Assist		System	☑	Edit Training Template
Advanced Life Support Techniques		System	☑	Edit Training Template
Advanced Rope Systems		System	☑	Edit Training Template
AED / CPR Classes	AED / CPR and First Responder classes put on for the public.	System	☑	Edit Training Template
Aerial Apparatus Driver Training		System	☑	Edit Training Template
Aerial Apparatus Maintenance		System	☑	Edit Training Template
Aerial Apparatus Operations		System	☑	Edit Training Template
Aerial Apparatus Positioning		System	☑	Edit Training Template
Aerial Apparatus Stabilization		System	☑	Edit Training Template

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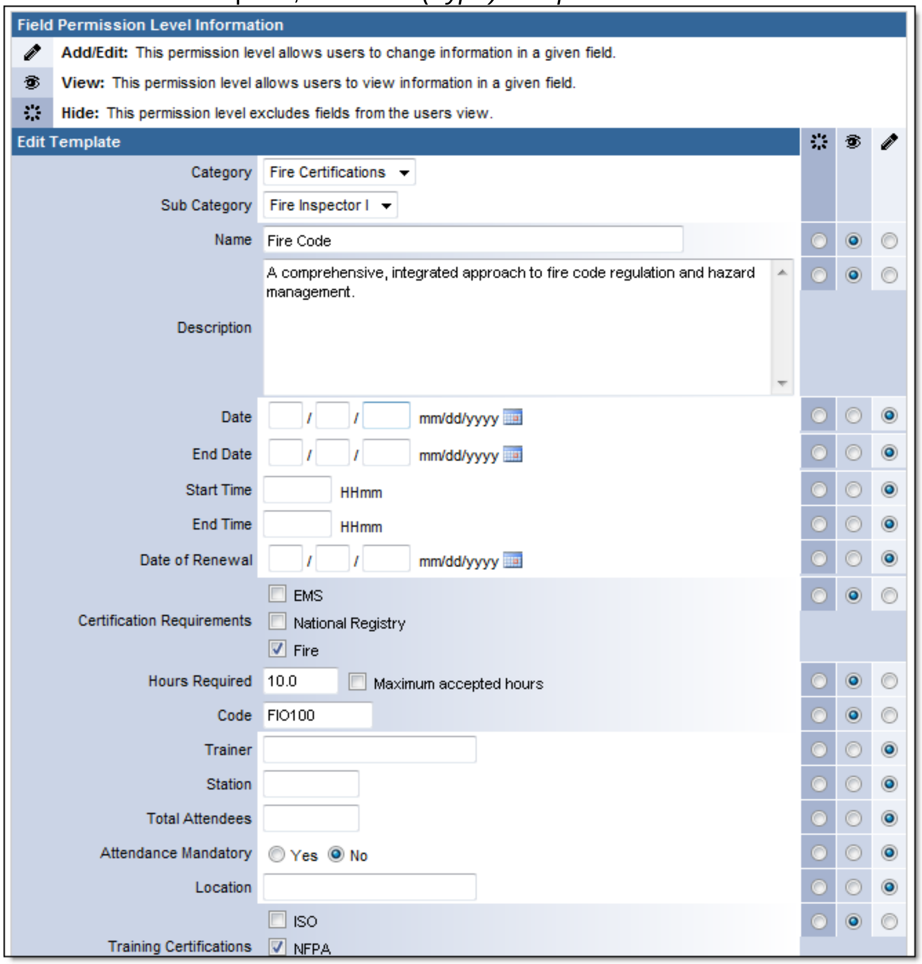
Add Template

4. For the desired template, click *Edit (Type) Template.*



5. To designate access to each aspect of the template when records are created from it, select the correct level of permission for each aspect.
   NOTE: This will select whether this information will be available to view or edit when individual records are created.
6. To change information within the template, use the provided fields to make any changes.
7. To select which user groups will be able to make changes to the template or records created from the template, in the *Group Permissions* section, select the desired permissions for each group.
   NOTE: When permissions differ between group permissions and permissions for individual elements of the template, the lower level of permission will be applied.
8. When finished, to keep the changes, click *OK.*
   To return to the list of templates, click *Back.*

4.4 Setting Up Training Topics

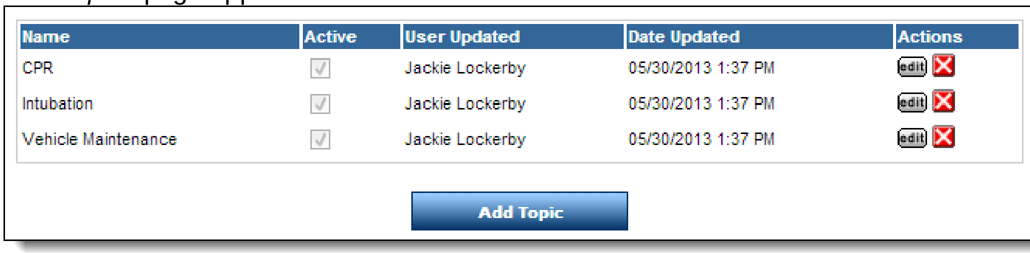
You can create a collection of topics that can be covered during your trainings. Each template and event can then be associated with the topics covered. Training topics can only be set up at the service level.

Creating a New Topic

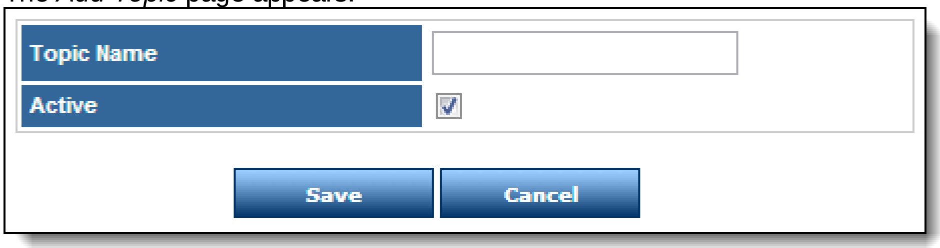
You can create a new topic to be available for trainings and activities at any time.

1. From the upper right, click *My Service.*

2. Under *Service Settings And Resources,* click *Activities and Training.*
   A sub-menu appears.
3. Under *Activities and Training,* click *Topics.*
   The *Topics* page appears.



4. Click *Add Topic.*
   The *Add Topic* page appears.

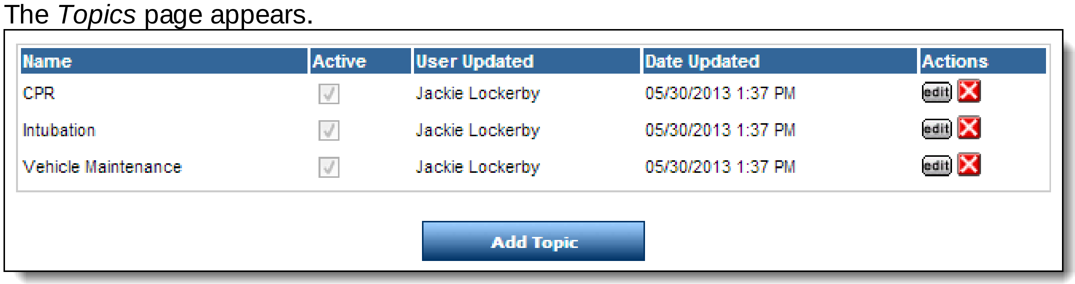


5. In the *Topic Name* text box, type the name of the topic.
6. To mark this topic as active and available to be used on templates and training/activity records, select the *Active* checkbox.
   OR
   To mark this topic as inactive and available only for reference, deselect the *Active* checkbox.
7. Click *OK.*
   The new topic is added.

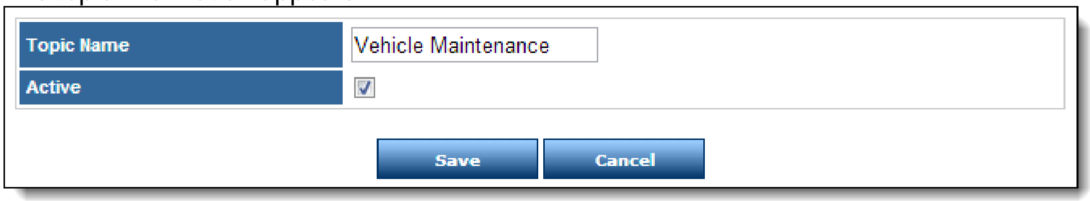
Editing a Training/Activity Topic

You can make updates to an existing topic that is used for classifying trainings and activities if needed.

1. From the upper right, click *My Service.*
2. Under *Service Settings And Resources,* click *Activities and Training.*
   A sub-menu appears.
3. Under *Activities and Training,* click *Topics.*
   The *Topics* page appears.



4. For the topic you want to update, from the *Actions* column, click *Edit.*
   The topic information appears.

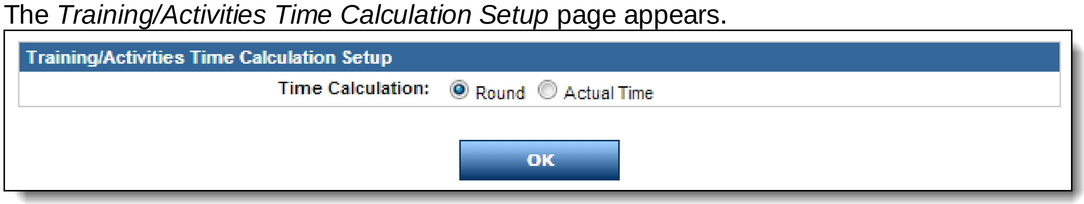


5. In the *Topic Name* text box, make any desired changes to the name of the topic.
6. To mark this topic as active and available to be used on templates and training/activity records, select the *Active* checkbox.
   OR
   To mark this topic as inactive and available only for reference, deselect the *Active* checkbox.
7. Click *OK.*
   The topic is updated.

4.5 Setting Training and Activity Time Calculations

A service administrator can control whether the system provides credits for the exact amount of time assigned to a training or activity or rounds to the nearest tenth (e.g., with rounding, a 1 hour and 15 minute class will be rounded to 1.3 hours while with exact time, the same class will be recorded as 1.25 hours).

1. From the top left, click *My Service.*
2. Select the *Setup* tab.
3. Under the *Service Settings and Resources* section, select *Activities and Training.*
   A sub-menu appears.
4. Under the *Activities and Training* section, select *Time Calculation.*
   The *Training/Activities Time Calculation Setup* page appears.



5. To round training and activity hours to the nearest hour, select *Round.*
   OR
   To track the exact minutes and hours, select *Actual Time.*
6. Click *OK.*
   The settings are applied.

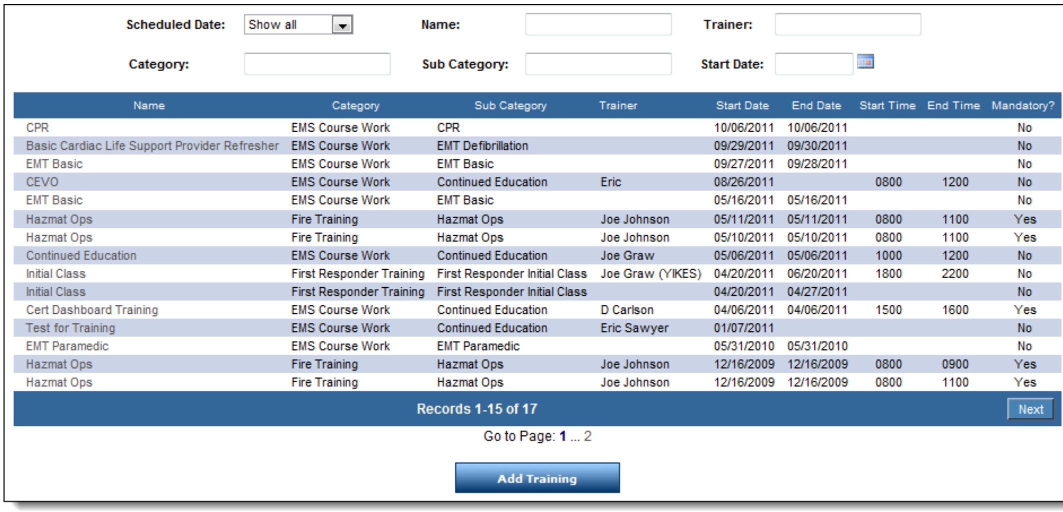
4.6 Working with Training Records

Administrators can view records of training events that are stored in the system, or may create or edit records. These records can contain information about the course itself, including the information covered, times and location of the training and certifications towards which it counts, information about attendees and documents that may be relevant to the course. Training records are based on templates, which contain information that can be copied into each course record.

Viewing and Editing Training Records

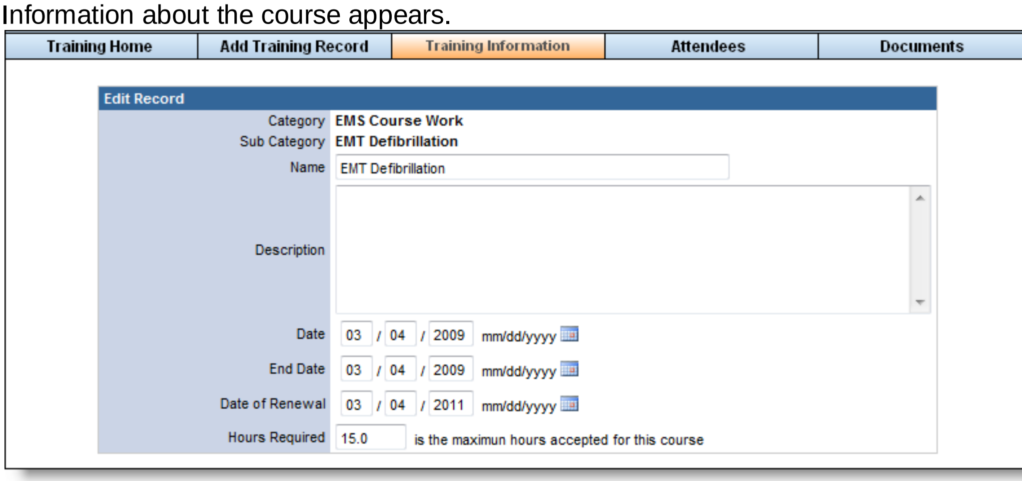
Administrators can view a list of training records currently in the system or can edit the information. When editing a training record, administrators can also add information about the attendees and the information about the course added to their record, or can add documents related to the course.

1. From the top left, click *My Service.*
2. Under the *Modules* tab, click *Training.*
   A list of training records appears.
   HINT: To see more records, from the *Scheduled Date* drop down menu, select *Show all*.



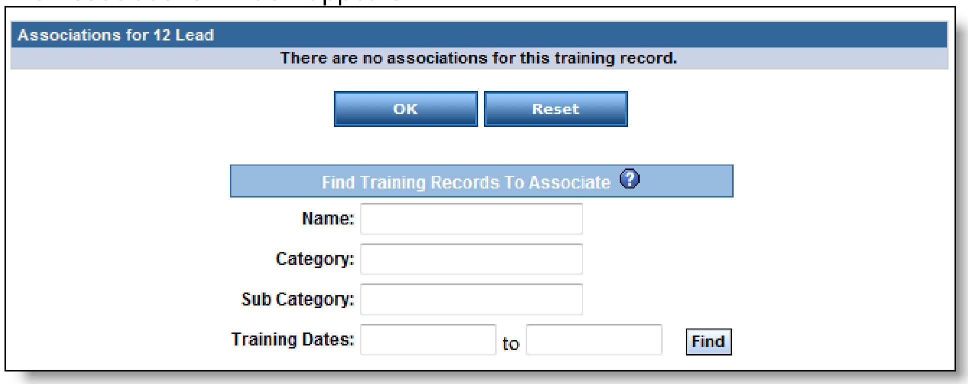
Name	Category	Sub Category	Trainer	Start Date	End Date	Start Time	End Time	Mandatory?
CPR	EMS Course Work	CPR		10/06/2011	10/06/2011			No
Basic Cardiac Life Support Provider Refresher	EMS Course Work	EMT Defibrillation		09/29/2011	09/30/2011			No
EMT Basic	EMS Course Work	EMT Basic		09/27/2011	09/28/2011			No
CEVO	EMS Course Work	Continued Education	Eric	08/26/2011		0800	1200	No
EMT Basic	EMS Course Work	EMT Basic		05/16/2011	05/16/2011			No
Hazmat Ops	Fire Training	Hazmat Ops	Joe Johnson	05/11/2011	05/11/2011	0800	1100	Yes
Hazmat Ops	Fire Training	Hazmat Ops	Joe Johnson	05/10/2011	05/10/2011	0800	1100	Yes
Continued Education	EMS Course Work	Continued Education	Joe Graw	05/06/2011	05/06/2011	1000	1200	No
Initial Class	First Responder Training	First Responder Initial Class	Joe Graw (YIKES)	04/20/2011	06/20/2011	1800	2200	No
Initial Class	First Responder Training	First Responder Initial Class		04/20/2011	04/27/2011			No
Cert Dashboard Training	EMS Course Work	Continued Education	D Carlson	04/06/2011	04/06/2011	1500	1600	Yes
Test for Training	EMS Course Work	Continued Education	Eric Sawyer	01/07/2011				No
EMT Paramedic	EMS Course Work	EMT Paramedic		05/31/2010	05/31/2010			No
Hazmat Ops	Fire Training	Hazmat Ops	Joe Johnson	12/16/2009	12/16/2009	0800	0900	Yes
Hazmat Ops	Fire Training	Hazmat Ops	Joe Johnson	12/16/2009	12/16/2009	0800	1100	Yes

3. From the list, click the name of the desired course.
   Information about the course appears.



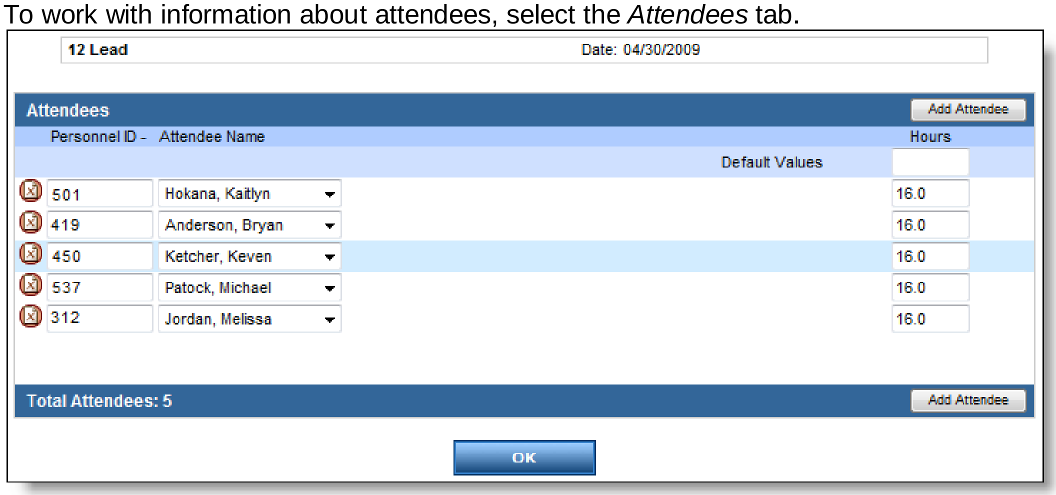
4. To change any information about the course, from the *Training Information* tab, use the provided fields to make the desired changes and click *OK.*
   NOTE: The information available to edit will depend on the setup of the template off of which this record was created.
5. To add an association for this course,

a. Click *View/Add Associations*.
The *Associations* window appears.



b. Using the provided fields, enter search terms to locate the desired record.
c. Click *Find.*
A list of courses meeting the criteria appears.
d. Select the checkbox(e)s for the course(s) to associate.
e. Click *Add Associations.*
The association is added.

6. To work with information about attendees, select the *Attendees* tab.

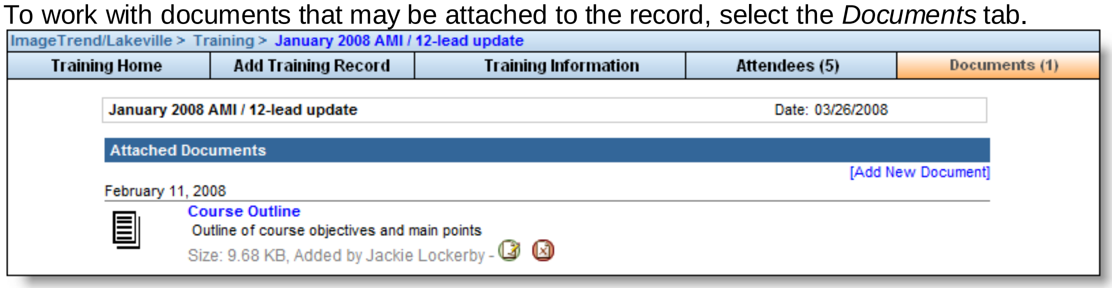


7. To edit information about the attendees, use the provided fields for each attendee to make changes and click *OK.*

NOTE: The information available to edit will depend on the setup of the template off of which this record was created.

HINT: To set information that will be the same for all attendees, type the information in the *Default Values* row. This information will be copied to all attendees unless individual changes are made.

8. To work with documents that may be attached to the record, select the *Documents* tab.



9. To add a new document,
a. Click *Add New Document.*

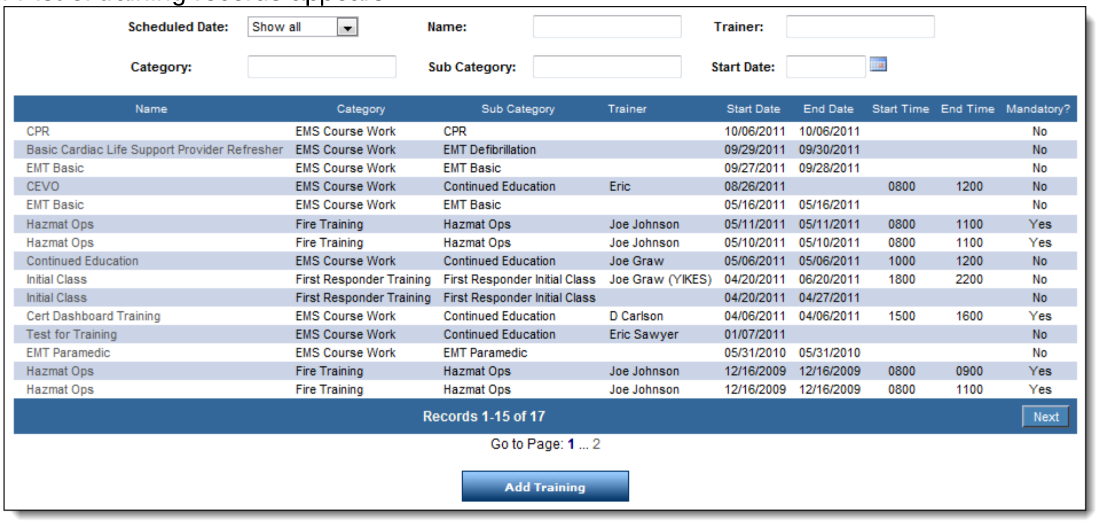
b. In the *Title* text box, type a name for the document.
c. In the *Description* text box, type additional information about the document.
d. Click *Browse…*
e. Navigate to and select the document to be attached to the record.
f. Click *Open.*
g. Click *Submit.*
The document is attached to the record.

10. To edit the name or description of an existing document,
    a. Click the corresponding *Edit* icon.
    b. In the *Title* text box, make any changes to the document's name.
    c. In the *Description* text box, make any changes to the additional information about the document.
    d. When finished, click *Submit.*
11. To return to the list of training records, select the *Training Home* tab.

Adding Training Records

Administrators can create new training records based on the templates available in the system. Based on the setup of the template, these records can be configured to apply to the specific course or training event.

1. From the top left, click *My Service.*
2. Under the *Modules* tab, click *Training.*
   A list of training records appears.

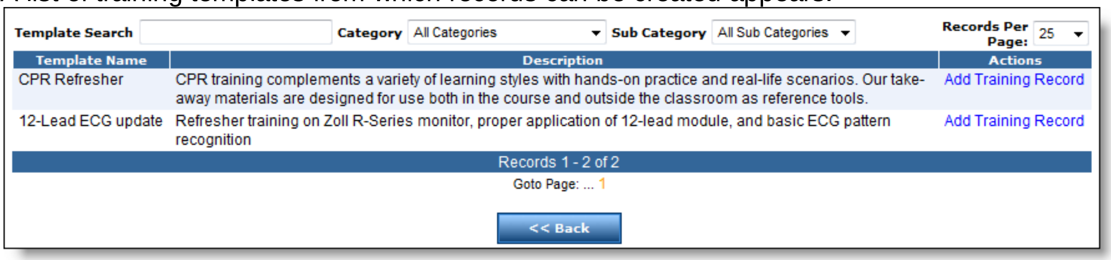


Scheduled Date: Show all | Name: | Trainer:
Category: | Sub Category: | Start Date:

Name	Category	Sub Category	Trainer	Start Date	End Date	Start Time	End Time	Mandatory?
CPR	EMS Course Work	CPR		10/06/2011	10/06/2011			No
Basic Cardiac Life Support Provider Refresher	EMS Course Work	EMT Defibrillation		09/29/2011	09/30/2011			No
EMT Basic	EMS Course Work	EMT Basic		09/27/2011	09/28/2011			No
CEVO	EMS Course Work	Continued Education	Eric	08/26/2011		0800	1200	No
EMT Basic	EMS Course Work	EMT Basic		05/16/2011	05/16/2011			No
Hazmat Ops	Fire Training	Hazmat Ops	Joe Johnson	05/11/2011	05/11/2011	0800	1100	Yes
Hazmat Ops	Fire Training	Hazmat Ops	Joe Johnson	05/10/2011	05/10/2011	0800	1100	Yes
Continued Education	EMS Course Work	Continued Education	Joe Graw	05/06/2011	05/06/2011	1000	1200	No
Initial Class	First Responder Training	First Responder Initial Class	Joe Graw (YIKES)	04/20/2011	06/20/2011	1800	2200	No
Initial Class	First Responder Training	First Responder Initial Class		04/20/2011	04/27/2011			No
Cert Dashboard Training	EMS Course Work	Continued Education	D Carlson	04/06/2011	04/06/2011	1500	1600	Yes
Test for Training	EMS Course Work	Continued Education	Eric Sawyer	01/07/2011				No
EMT Paramedic	EMS Course Work	EMT Paramedic		05/31/2010	05/31/2010			No
Hazmat Ops	Fire Training	Hazmat Ops	Joe Johnson	12/16/2009	12/16/2009	0800	0900	Yes
Hazmat Ops	Fire Training	Hazmat Ops	Joe Johnson	12/16/2009	12/16/2009	0800	1100	Yes

Records 1-15 of 17 Next
Go to Page: 1 ... 2
Add Training

3. Click *Add Training.*
   A list of training templates from which records can be created appears.

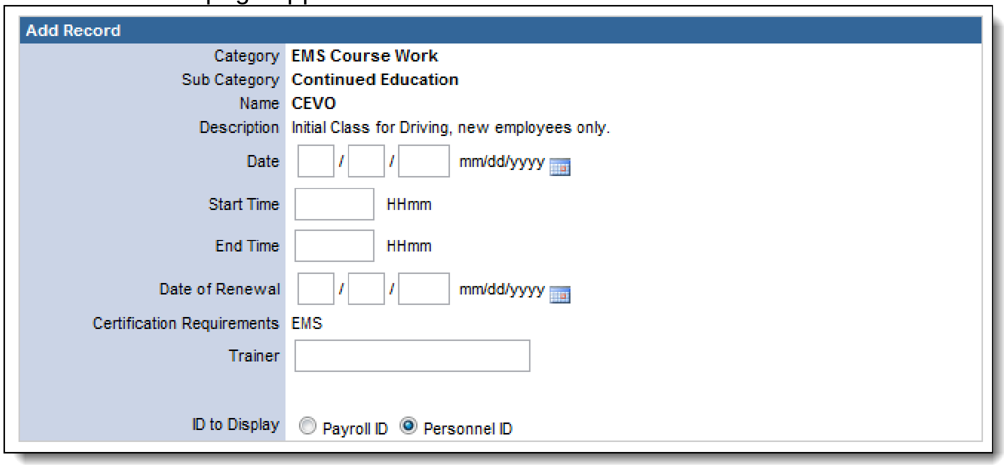


Template Search | Category: All Categories | Sub Category: All Sub Categories | Records Per Page: 25

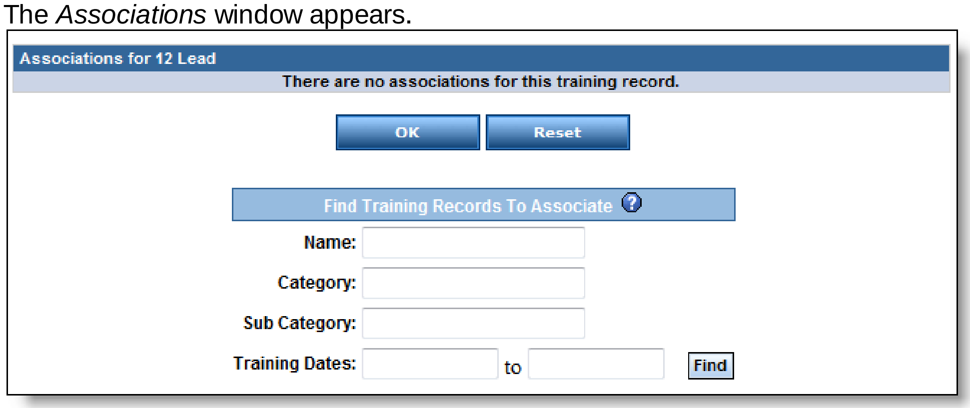
Template Name	Description	Actions
CPR Refresher	CPR training complements a variety of learning styles with hands-on practice and real-life scenarios. Our take-away materials are designed for use both in the course and outside the classroom as reference tools.	Add Training Record
12-Lead ECG update	Refresher training on Zoll R-Series monitor, proper application of 12-lead module, and basic ECG pattern recognition	Add Training Record

Records 1 - 2 of 2
Goto Page: ... 1
<< Back

4. For the template from which the record should be created, click *Add Training Record.* The *Add Record* page appears.

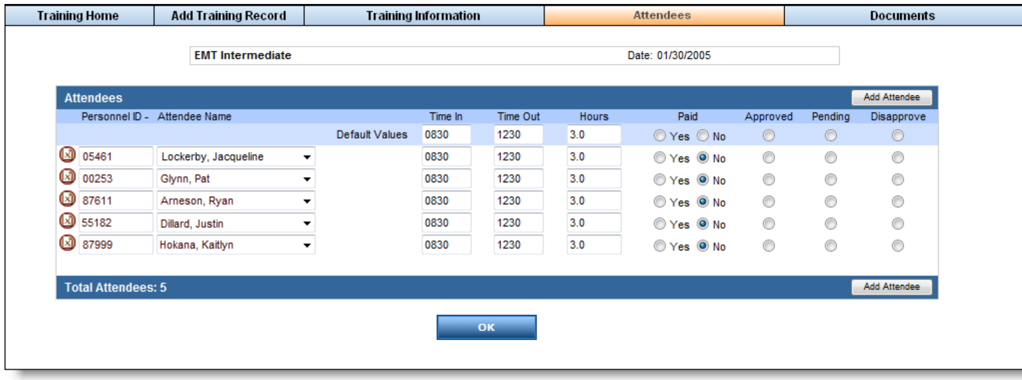


5. Using the provided fields, add or change any information to complete the record.
   NOTE: The fields available for editing will differ based on the setup of the template on which this record is based.
6. When finished, click *OK.*
   Additional tabs appear to complete more information about the course.
7. To add an association for this course,
   a. Click *View/Add Associations*.
      The *Associations* window appears.



   b. Using the provided fields, enter search terms to locate the desired record.
   c. Click *Find.*
      A list of courses meeting the criteria appears.
   d. Select the checkbox(e)s for the course(s) to associate.
   e. Click *Add Associations.*
      The association is added.
8. To add information about attendees,

a. Select the *Attendees* tab.



b. From the *Attendees* drop down menus, select the names of the staff members who will be attending the course.

NOTE: Users can also type a personnel ID into the *Personnel ID* fields to select the correct staff members.

c. **OPTIONAL:** To enter information that will be the same for all attendees, enter information into the fields in the *Default Values* row.
This information will be copied into the fields for all attendees but can be changed for specific attendees if necessary.

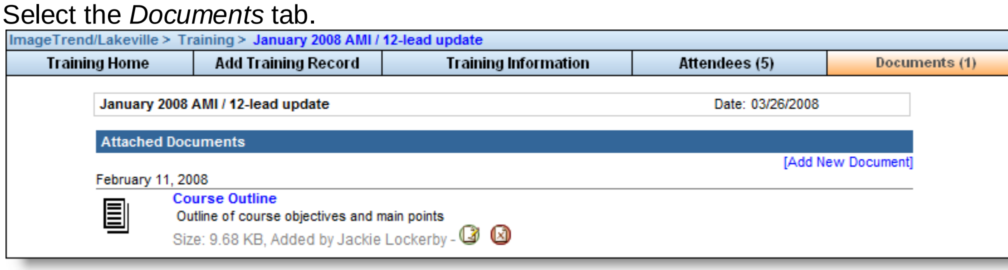
d. To change information for specific attendees, enter the correct information in the corresponding fields.

e. To add a new attendee, click *Add Attendee* and enter information into the resulting new row.

f. When finished, click *OK.*

9. To attach documents to the record,

a. Select the *Documents* tab.



b. Click *Add New Document.*

c. In the *Title* text box, type a name for the document.

d. In the *Description* text box, type additional information about the document.

e. Click *Browse…*

f. Navigate to and select the document to be attached to the record.

g. Click *Open.*

h. Click *Submit.*
The document is attached to the record.

CHAPTER 5

STAFF INFORMATION AND SETUP

5.1 Chapter Overview

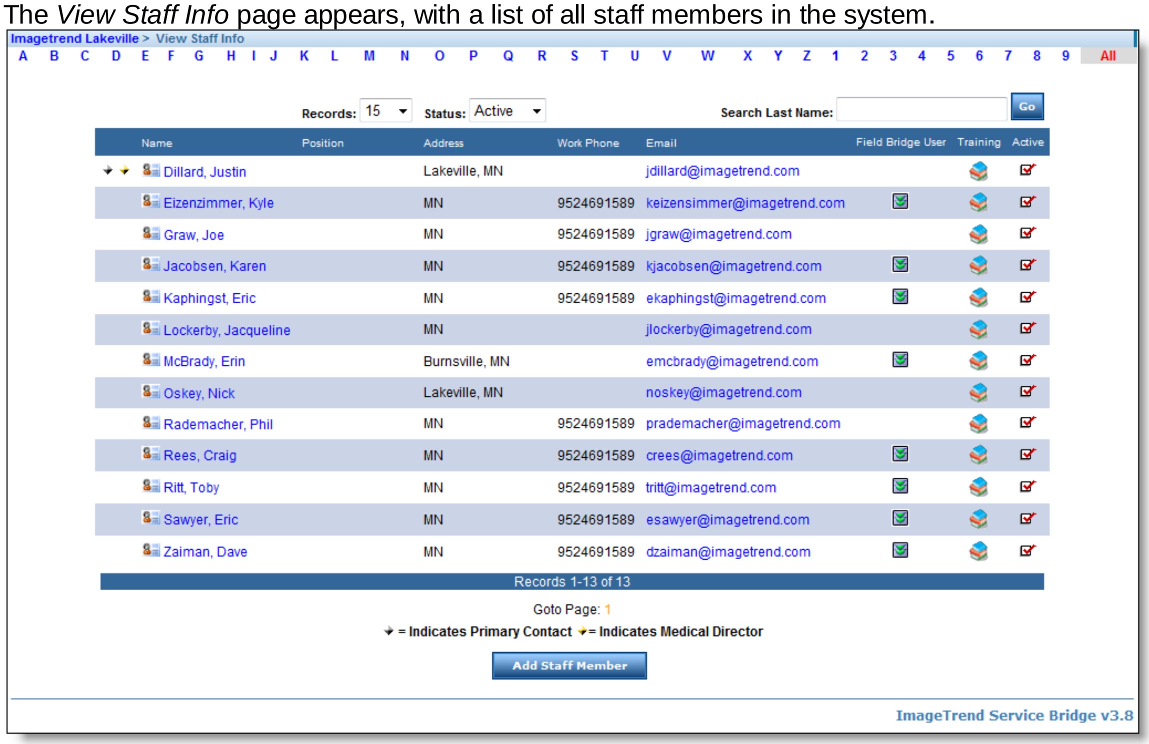
This chapter explains how administrators can view, change or add information for staff profiles. If this information remains current in the State Bridge, data entry for incident reports will be considerably more efficient and easy.

5.2 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 State Bridge and store contact and demographic information. Staff profiles also give staff members a username and password to sign in to the State Bridge. This information is organized into tabs in the editable profile. Each staff member of a service who has access to the State 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.*
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 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.*

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.

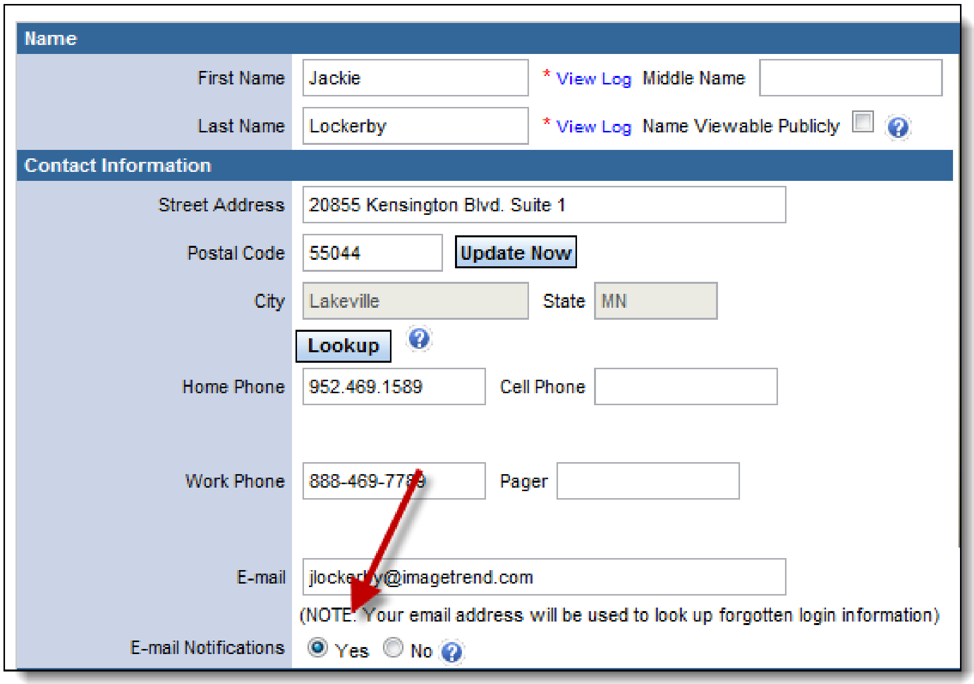
3. From the *Demographics* tab, use the provided fields to enter or change any information.
   NOTE: The driver's license number and social security number available on this page will be available only to that staff member and the service administrator(s).

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 State 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.

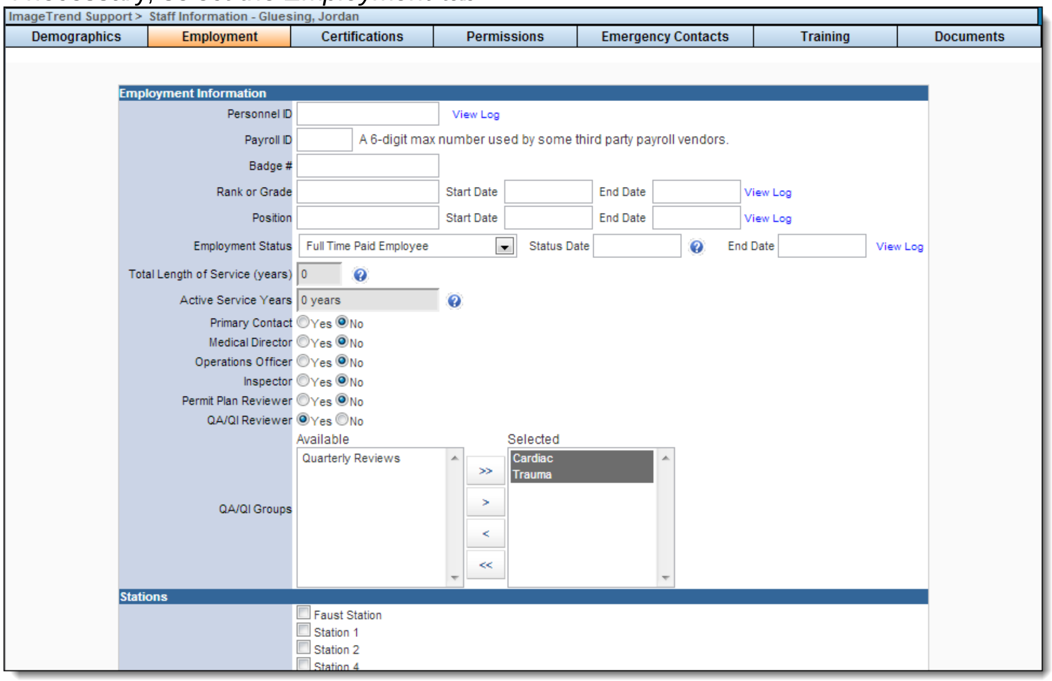
The Employment Tab

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

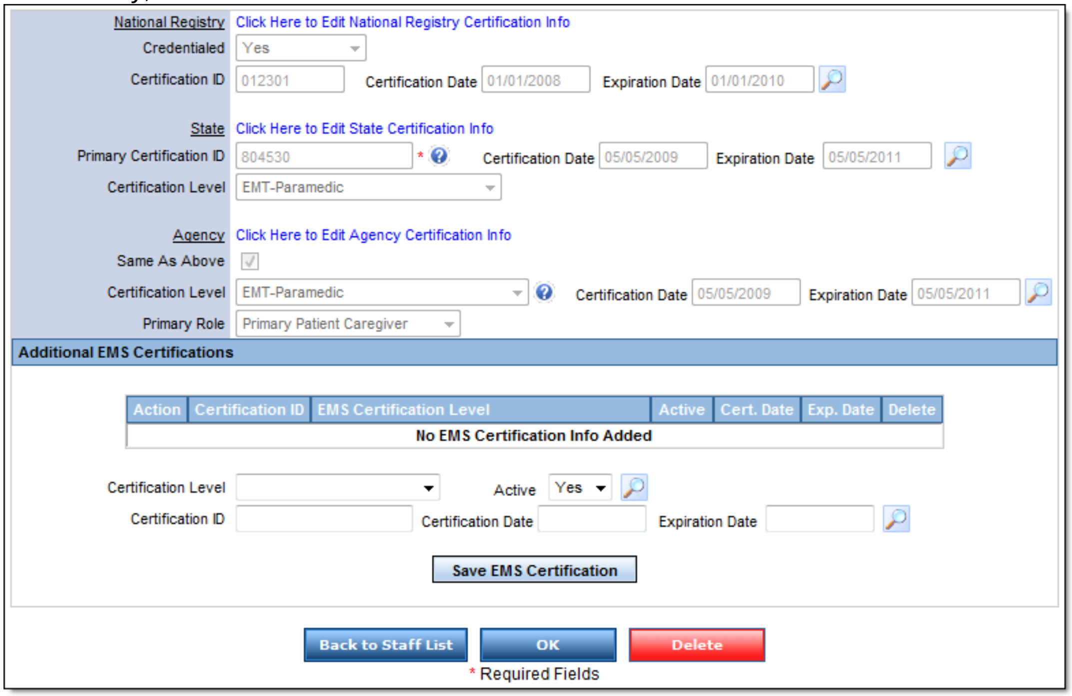
   HINT: The user will be able to access information designated to all stations to which they are assigned, and will be available in all lists of staff by station for those selected stations.
5. In the *Leave of Absence* section, enter all information to be documented for a leave of absence for this staff member and click *Save Leave of Absence Info*.

The Certifications Tab

The *Certifications* tab keeps track of staff members' certifications and their respective dates. In order for any staff member to appear on run forms as a possible provider, a state certification ID must be entered in this section.

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.*

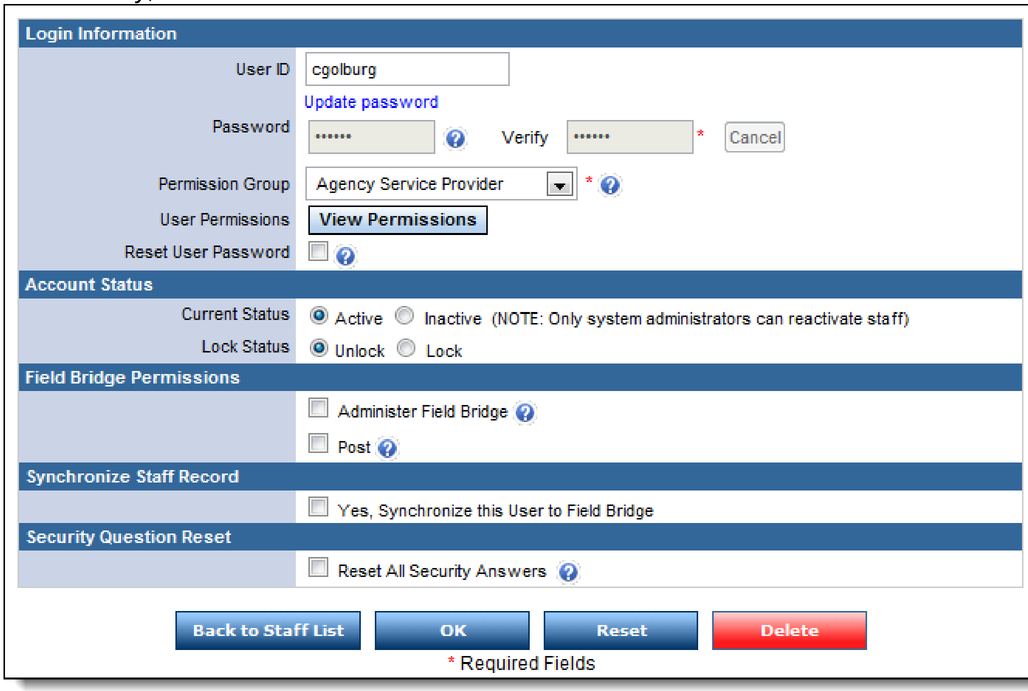
The Permissions Tab

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

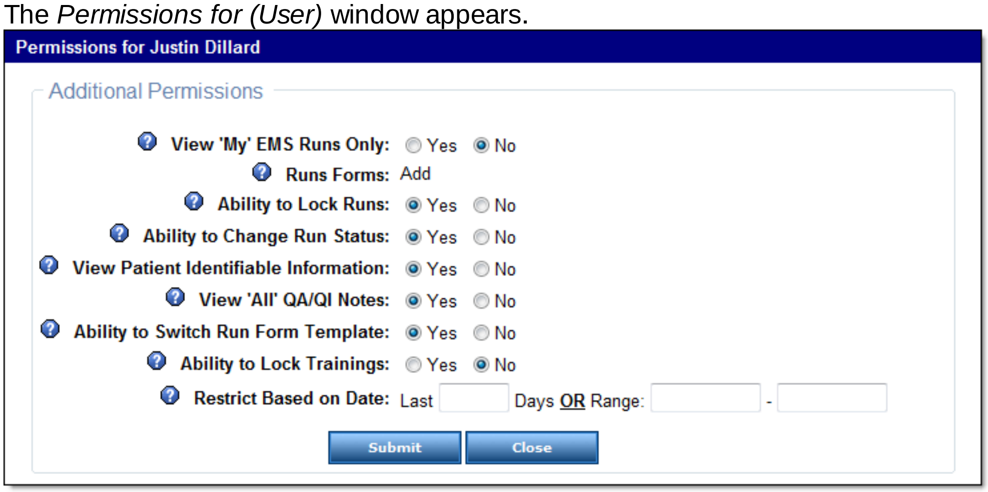
To work with this information:

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.
   NOTE: 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.
   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 change specific access rights,
   a. Click *View Permissions.*
      The *Permissions for (User)* window appears.



   b. Select and deselect checkboxes to allow and prevent access to particular functions.

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

View My Runs Only
Gives the user access to past run reports submitted only from his or her account.

Runs Forms
Determines the level of access the user will have to run forms that they are allows to access. If the user is denied access to specific run forms (e.g., if they are allowed to view run forms only they have submitted or only within a certain time frame), that will take priority over the level of access given here.

Ability to Lock Runs
Determines whether this user will have the authority to prevent changes from being made to run forms after they are submitted.

Ability to Change Run Status
Determines whether this user will have the authority to change the status assigned to a run form (e.g., in progress, reviewed, billed).

View PDF Reports for EMS Runs
Determines whether this user will be able to generate PDF reports for a run form.

View Patient Identifiable Information
Determines whether this user will be allowed to view patient identifiable information on run forms.

View 'All' QA/QI Notes
Determines whether the user will be able to work with all QA/QI notes submitted through the system or only with which he or she was associated.

View Unified PDF
Determines whether this user will be able to generate the Unified PDF report.

Ability to switch run form template
Determines whether this user will be able to change run form templates after a run form is started.

Ability to Lock Trainings
Determines whether this user will be able to lock training records to prevent them from being edited.

Restrict Based on Date
Allows the user to view run forms submitted in only the specified time frame.

c. When finished, click *Submit.*

6. To activate or deactivate the account, in the *Current Status* section, select the desired option.
7. If the EMS Field Bridge system is used in addition to the State Bridge, to determine whether the user has access to specific 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
Determines whether this user can see the *Admin Options* section of the Field Bridge.

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

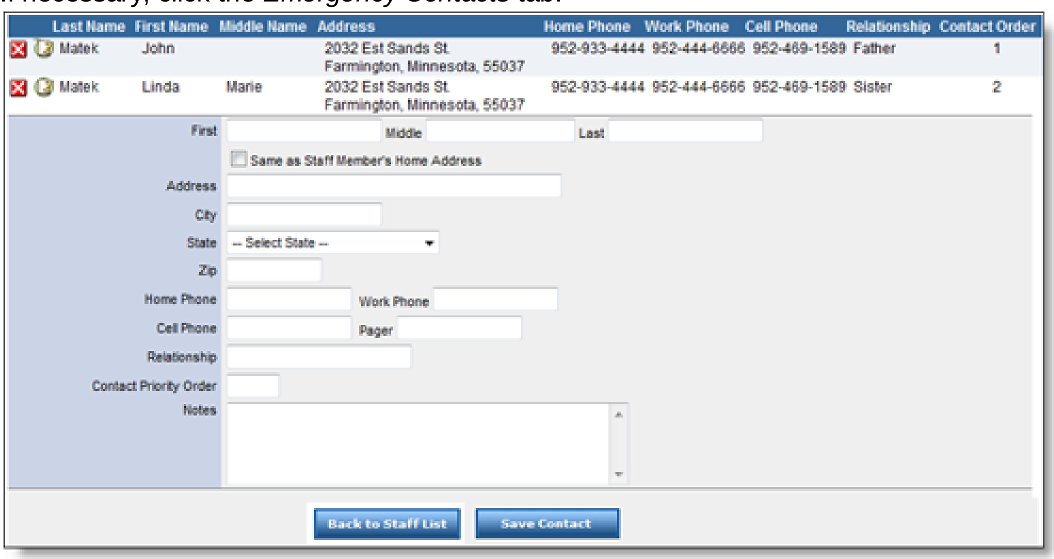
8. To copy all information from the user's State Bridge profile to the user's Field Bridge profile, select the *Yes, Synchronize this User to Field Bridge* checkbox.
9. If using security questions, to force the user to re-enter the answers for those questions, select the *Reset All Security Answers* checkbox.
   NOTE: If editing your own profile, the security questions and answers will appear on this page for editing.
10. 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.



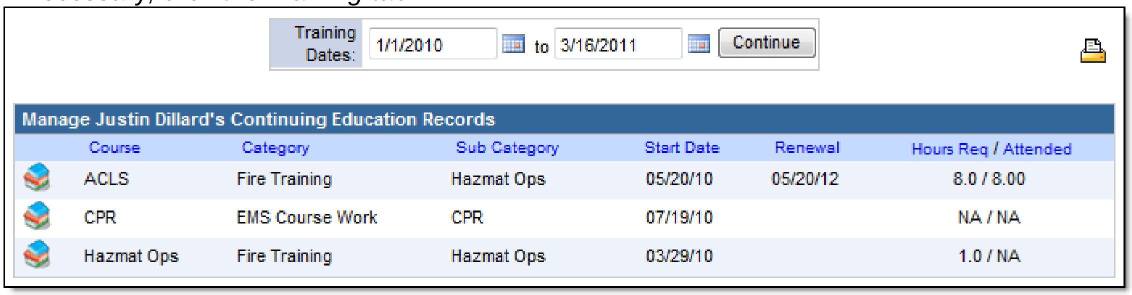
3. To edit a contact's information or view additional notes, click the *Edit* icon and make any changes in the updated text boxes below.

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.



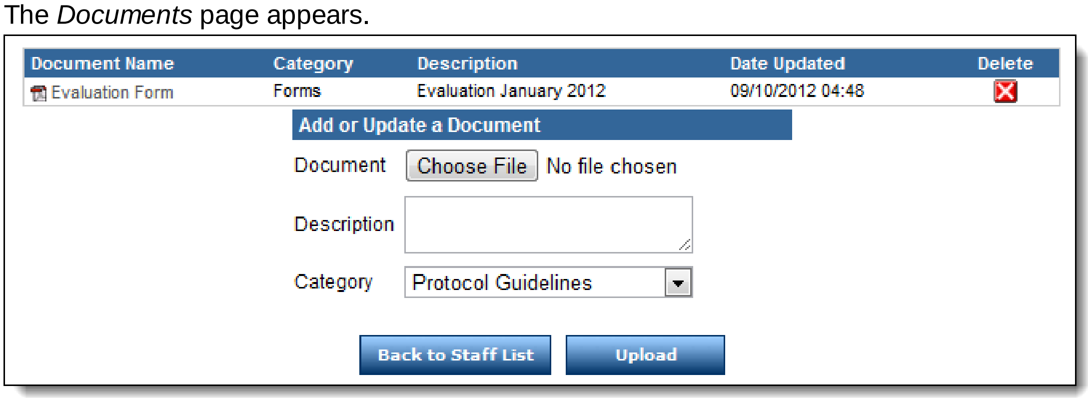
3. To select a date range for the training you want to view, in the *Training Dates* text boxes, type the desired date range.
   OR
   To select the dates from a calendar, click the *Calendar* icons and select the desired dates.
4. To view more complete information about a particular record, click the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

The Documents Tab

The *Documents* tab can track any files that you want to upload and keep with this staff member's profile. Documents can be categories based on the categories set up for your service, which will also determine which people can view each document.

To work with staff documents,

1. From the staff member's profile, click *Edit.*
2. If necessary, click the *Documents* tab.
   The *Documents* page appears.



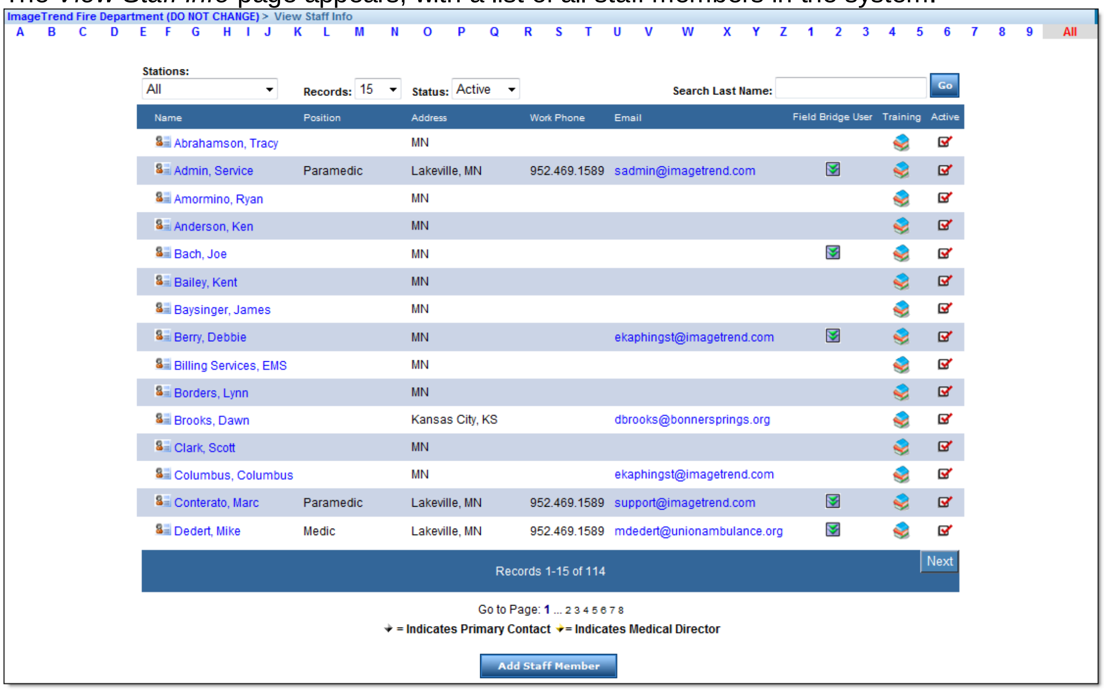
3. To add a new document,
   a. In the *Document* section, click *Choose File.*
      The *Choose File* dialog box appears.
   b. Navigate to and select the file you want to add.
   c. Click *Open.*
      The file is selected and the *Choose File* dialog box closes.

d. In the *Description* text box, type any additional details about this document.
e. From the *Category* drop down menu, select the desired category.
f. Click *Upload.*
The document is added to the staff member's profile.

5.3 Adding Staff Profiles

Administrators can add staff profiles to allow new staff members to access the system or simply to keep their information in the system.

1. From the top left, click *My Service.*
2. Select the *Staff* tab.
The *View Staff Info* page appears, with a list of all staff members in the system.



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.*

CHAPTER 6

DATA COLLECTION AND ANALYSIS

6.1 Chapter Overview

One primary purpose of the State Bridge is to collect and analyze data about EMS incidents. This chapter explains how to create and view incident reports, view the history of incident reports and create specified reports for analyzing incident data.

6.2 Adding a New Incident Report with Dynamic Run Forms

Users with the correct permission rights can complete run forms using the State Bridge. Services may choose to set up templates for common occurrences with a different layout. Dynamic run forms may not be used in your system, but provide additional features if they are available.

The dynamic run form requires Silverlight, a free download from Microsoft, to function properly.

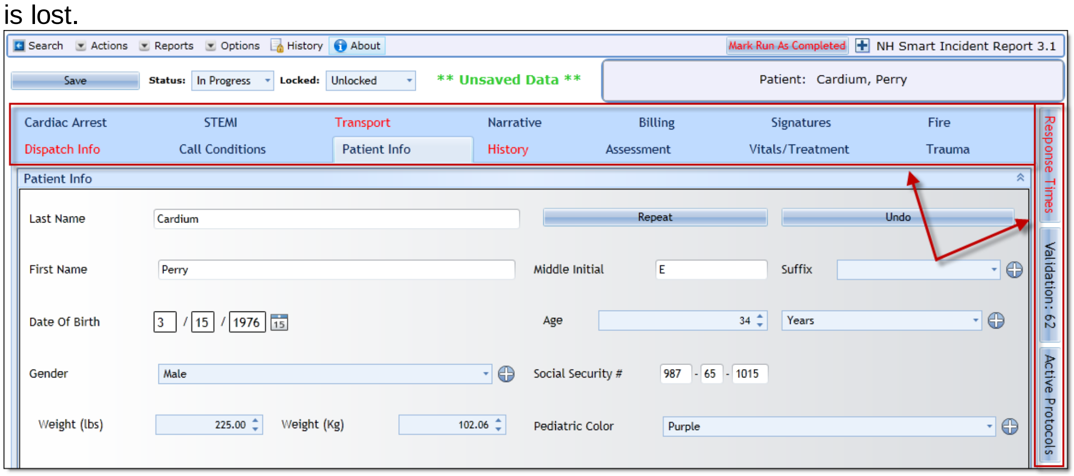
Incident Report Tips

Dynamic run forms can be customized by system administrators, so keep in mind that your dynamic run form may have different features, layout or tabs than the run forms pictured here.

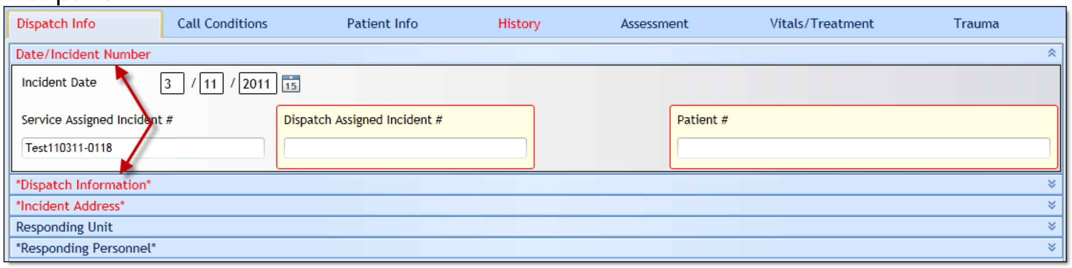
To Open a New Dynamic Run Form

1. From the top left, click *My Service.*
2. Under the *Incidents* tab, click *Add Run.*
   The *Run Form Template Selection* page appears.
3. From the *EMS Dynamic Run Templates* section, select the appropriate template for the incident.
   The appropriate report appears.

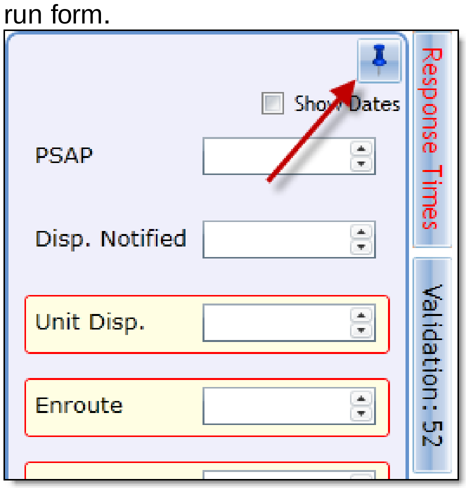
The dynamic run form is organized into multiple tabs and panels. Tabs are displayed at the top of the run form and along the right side. Any top and right side tab can be opened by clicking on it. We recommend that you save your run form before opening a new top tab to make sure no data is lost.



Each tab contains multiple panels. A panel can be opened or closed by clicking on the header of that panel.

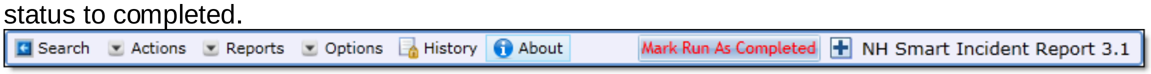


The tabs on the right side can be opened at the same time as any tab that is listed across the top, allowing you to refer to information there while working on the rest of your run form. The tabs on the right side will automatically be hidden when you move your mouse away from them, although you can click the *Pin to Side* icon to keep this panel displayed while you work on the rest of the run form.



There are two toolbars at the top of the dynamic run form to provide additional information and options. The toolbar immediately above the run form informs you when there is unsaved data in the run form, allows you to save at any time and allows individuals with the correct permissions to change the status or lock the run. In addition, as information is completed in the run form, this toolbar contains a summary of the patient's information.

Another toolbar is available above the page, which provides options for adding additional components to the run form (e.g., addendums, attachments or new patients), viewing reports that can be printed regarding this run report, viewing the history of this run form or changing your preferences for viewing the run form. The *Mark Run As Completed* button also appears on the right side of this toolbar. This allows you to mark this run as completed for audit tracking at any time. Depending on your service's setup, this may also lock the run for editing and change its status to completed.



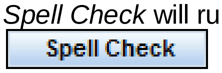
Run Form Tools

The State Bridge run form provides you with some tools to make it easier for you to complete your run forms.

- *Lookup* buttons allow you to search for and select information from a list.
  

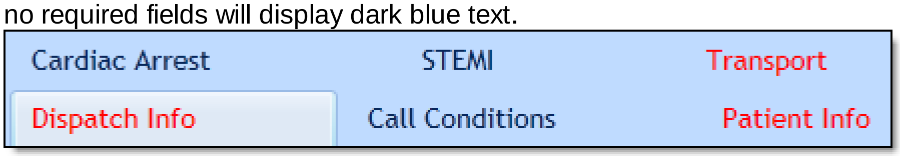
- *Set From* checkboxes will automatically complete some information based on what you have already filled in (e.g., completing the city and state information based on a zip code).
  

- *Calendar* icons will help you select a date by opening a window with a calendar.
  

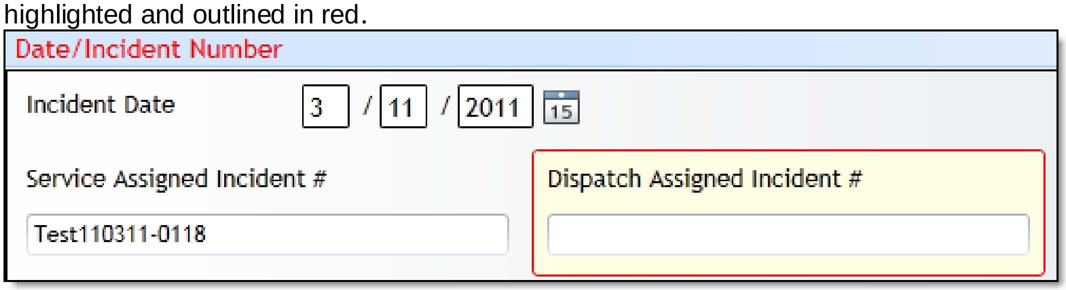
- *Spell Check* will run a spell checker on your narratives or other text fields with the feature,
  

Working with Run Validation

The tabs for each form are coded to inform users about their status. Tabs that have required information missing will display red text and tabs that have all required fields completed or have no required fields will display dark blue text.



Within red tabs, panels with incomplete fields will display red text and the individual fields will be highlighted and outlined in red.



A summary of all required fields that are incomplete is available from the *Validation* tab on the right. Each field displays the number of validation points that were subtracted as well as a *Go* link to jump to that field.

	Rule	Value
Go	**Incident Identifier: PCR Number** PCR Number is missing	-1
Go	**Odometer 1: Starting Odometer** Starting Odometer is invalid	-1
Go	**Incident Identifier: Incident Numl** Incident Number is missing	-1
Go	**Call Info: Response Disposition** Response Disposition is missing	-1
Go	**Incident Info: Dispatch Reason** Dispatch Reason is missing	-1
Go	**History: Onset Date** Onset Date is missing	-1
Go	**Times 3.1: Unit Dispatched** Unit Dispatched date/time is missing	-1

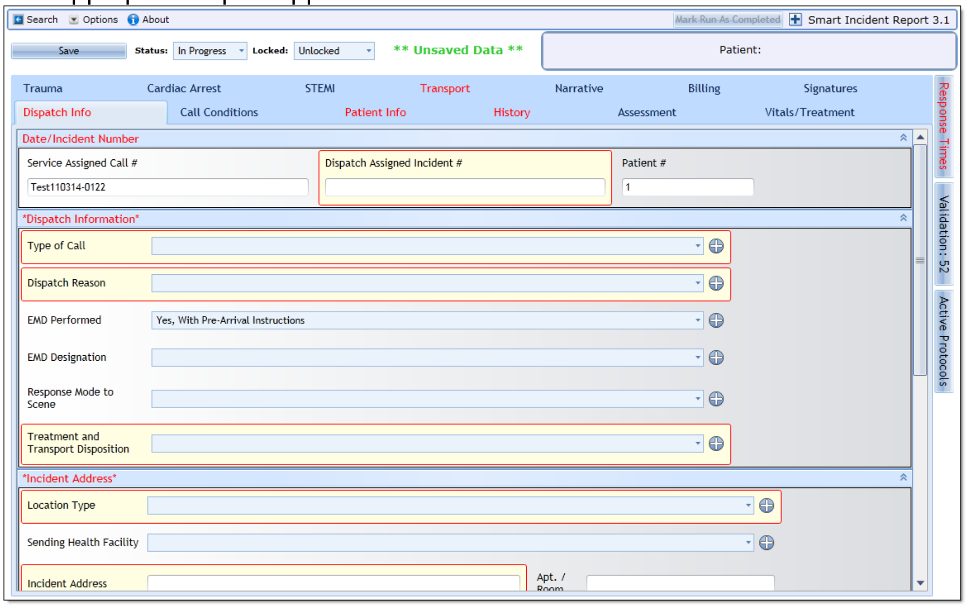
Administrators with the correct permissions can set up validation rules to designate which fields are important and how much will be taken off of the form’s validity score when they are left incomplete.

Completing a New Incident Report

The dynamic run form used by your service may differ from those displayed in these instructions. Tabs in the dynamic run form can be filled out in any order, although it is recommended that you save each tab before switching to a new tab to ensure that no data is lost.

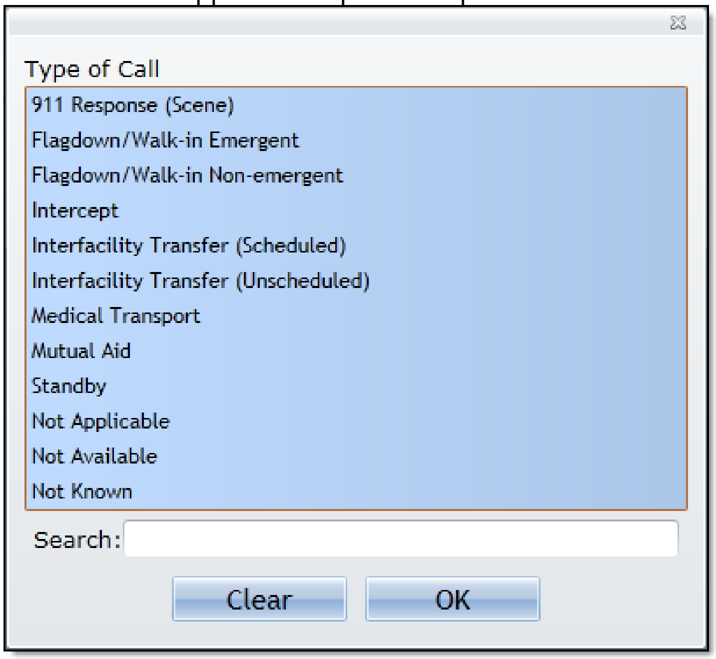
1. From the top left, click *My Service.*
2. Under the *Incidents* tab, click *Add Run.*
   The *Run Form Template Selection* page appears.
3. From the *EMS Dynamic Run Templates* section, select the appropriate template for the incident.

The appropriate report appears.



4. Using the provided fields and tabs, enter all information pertaining to the EMS incident.
   NOTE: Be sure to click *Save* before opening a new tab to prevent data from being lost.
5. To open a specific tab, click the name of the tab.
   NOTES:
   Be sure to click *Save* before opening a new tab to prevent data from being lost.
   The tabs on the right side will expand to display a panel on the right. When this panel is first displayed, it will cover up part of the main portion of the run form, and will be hidden as soon as your mouse moves away from the panel.
6. **OPTIONAL:** To keep the panel containing the tabs on the right side open and to adjust the main portion of the run form so it is not hidden behind the right panel,
   a. Click one of the tabs on the right side.
   b. Click the *Pin* icon .
      HINT: This can be useful if you need to refer to the information in the right panel at the same time as the main run form, such as when you are working with an active protocol or working with validation issues.
   c. At any point, to unpin the panel, click the *Pin* icon again.
7. To expand a panel that is hidden, click the name of the panel.
   OR
   To hide a specific panel that is displayed, click the name of the panel.
8. To enter text into a field, click the field and type.
9. To enter a response from a list of possible responses, in fields with a *Look up* icon,

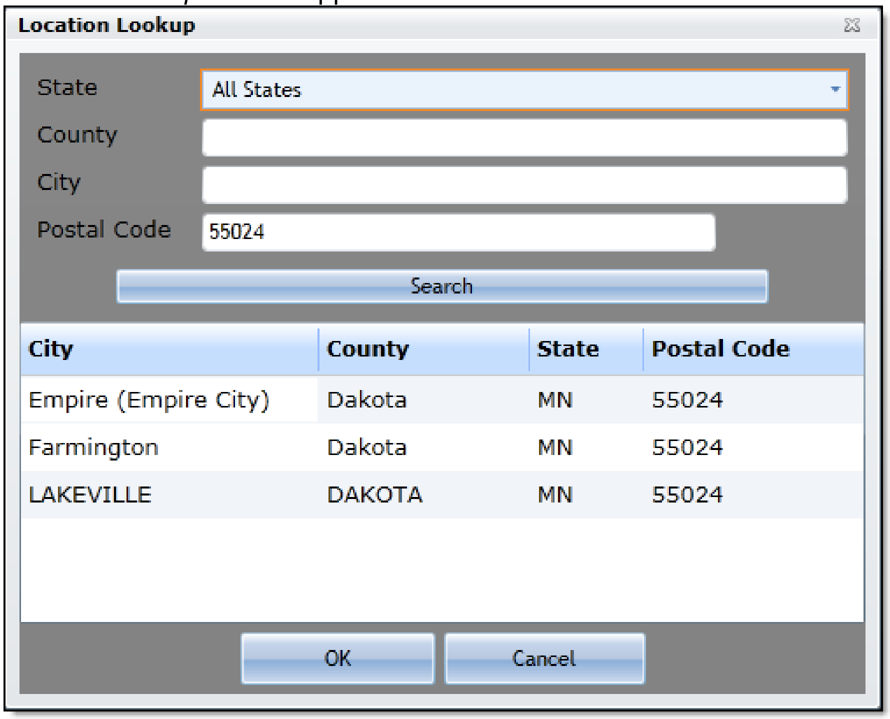
a. Click the *Look Up* icon .
A new window appears with possible options to enter.



b. Navigate to and select the desired option.
HINT: Depending on the field, you may be able to use a *Search* text box or filters to help locate the desired option.
c. Click *OK.*
The option is inserted into the field.

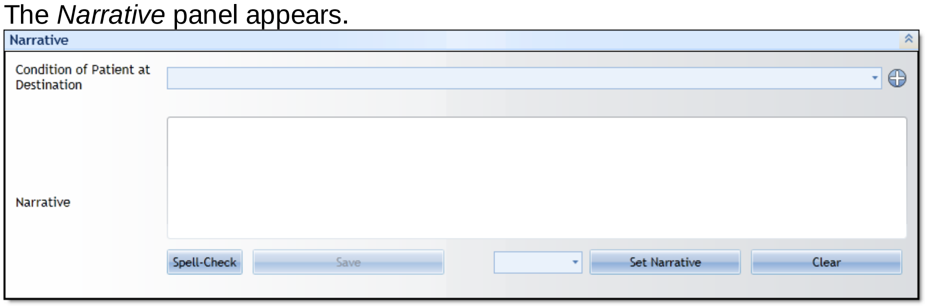
10. For address fields, to complete the city, state and county information,
    a. In the *Postal Code* text box, type the zip code for the address.
    b. Click *Set from Postal Code.*
    The information is entered. If there are multiple locations for this zip code, the

Location Lookup window appears.



c. Click the desired location information.
d. Click *OK.*
   The information is entered.

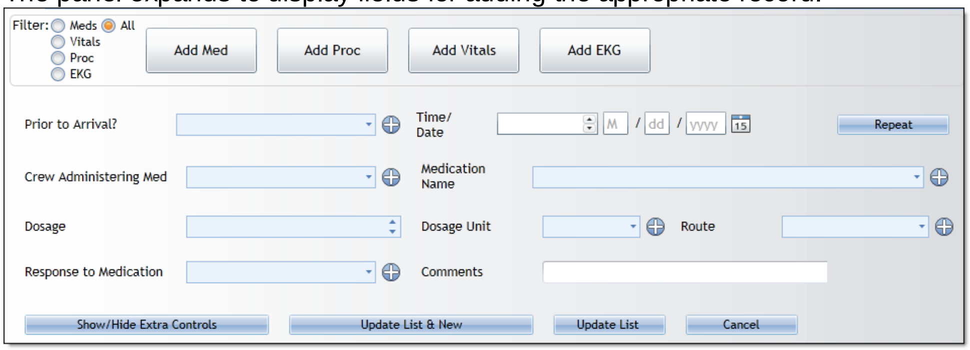
11. For date fields, to select the date from a calendar, click the *Calendar* icon.
12. To use the automatic narrative feature,
    a. In the *Narrative* tab, if necessary, click the *Narrative* panel to open the panel.
       The *Narrative* panel appears.



    b. From the drop down menu, select the type of narrative to enter.
       HINT: The automatic narrative feature completes the narrative based on details you have previously entered into the run form. Because of this, it is most helpful to complete the narrative after filling in the rest of the run form.
    c. Click *Set Narrative.*
       WARNING: If you have already typed into the *Narrative* text box, inserting an automatic narrative will delete your text and replace it with the automatic narrative text.
    d. Make any desired changes to the narrative.
    e. Click *Save.*
13. To add medication, procedure, vitals, EKG or provider assessment records,
    a. In the *Vitals/Treatment* tab, if necessary, click the *Medication/Procedure/Vitals* panel to open it.

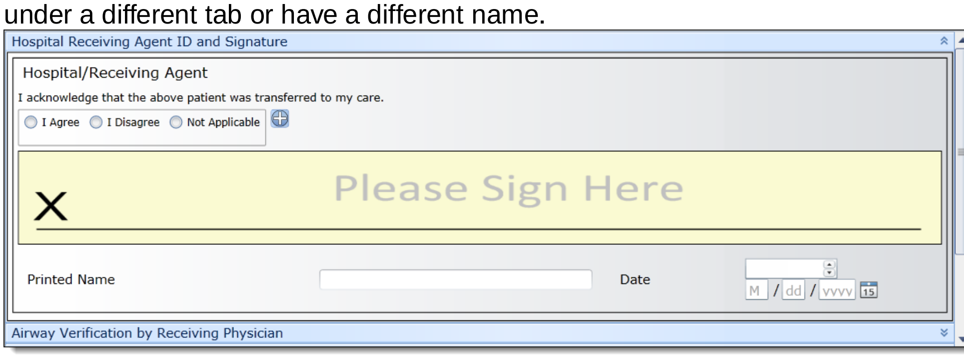
NOTE: If your service is using a different template, this section may appear under a different tab.

b. At the bottom of the panel, click the appropriate button (e.g., to add a medication record, click *Add Med*).
   The panel expands to display fields for adding the appropriate record.



c. Complete the fields for this record.
d. To view additional fields to input more information, click *Show/Hide Extra Controls.*
e. When finished, to save this record and move on, click *Update List.*
   OR
   To save this record and begin a new record, click *Update List & New.*

14. To collect signatures,
    a. In the *Signatures* tab, click the header for the first signature to add.
       The signature panel expands.
       NOTE: If your service is using a different template, this section may appear under a different tab or have a different name.



    b. Select the appropriate answers to the questions.
    c. Using the mouse, sign in or ask the appropriate person sign in the *Please Sign Here* section of the panel.
    d. In the *Printed Name* text box, type the name of the signatory.
    e. In the *Date* section, type or select the appropriate date and time that this signature was collected.
    f. When finished collecting signatures, click *Save* in the upper left to save the run form.

15. To add additional information to the run form, from the run form's toolbar, click *Form Options* and the selected option.
    HINT: For more information, please refer to *Additional Run Form Options.*

6.3 Additional Dynamic Run Form Options

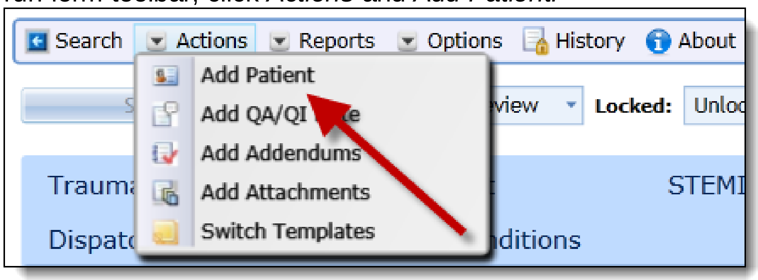
Once a run form is completed, system users can add additional information, including QA/QI notes, addendums or attachments. In addition, a new patient can be added to the incident, which will create a patient care report attached to the initial incident report. If you have previously used these features with the standard run form, you will find that the process is nearly identical when working with the dynamic run form.

NOTE: Be sure to complete the first run form before adding a new patient.

Adding a Patient to a Run Report

When a patient is added to an existing run form, a new patient care report will be created for the patient and attached to the original incident report. Patient-specific information can be recorded in this new patient care report. This option should not be completed until the run form is otherwise finished.

1. From the existing run form to which the patient care report should be attached, from the run form toolbar, click *Actions* and *Add Patient.*

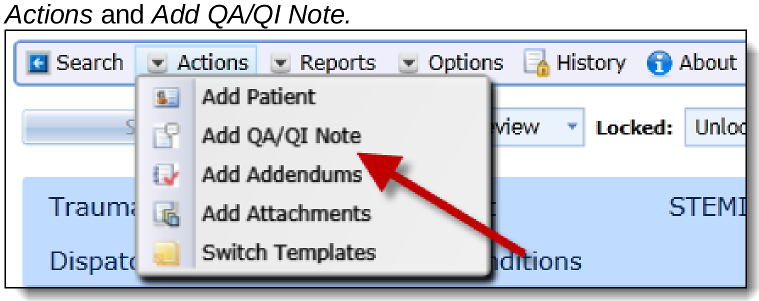


2. In the *New Patient Care #* text box, type the number for this patient care report.
   NOTE: These numbers will differ depending on your service's requirements.
3. Click *Add New Patient To this Incident.*
   A new patient care report appears.
4. Using the provided fields, complete the patient care report for the new patient as indicated in *Adding a New Incident Report.*

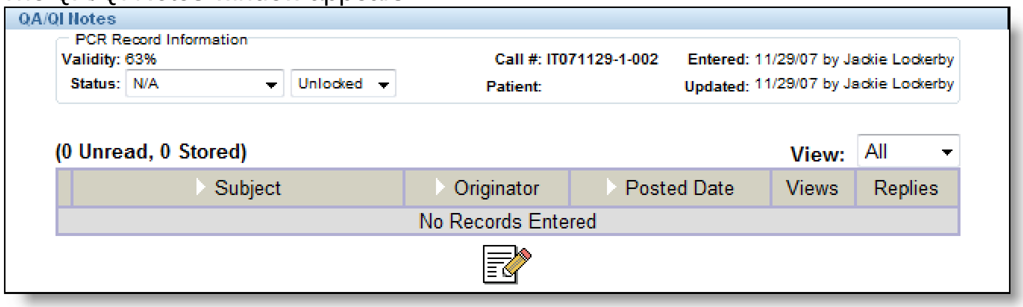
Adding QA/QI Notes to a Run Report

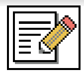
Administrators can add notes to completed run reports with comments for the personnel included in the incident. These notes will be attached to the incident and sent to the inboxes of any personnel included.

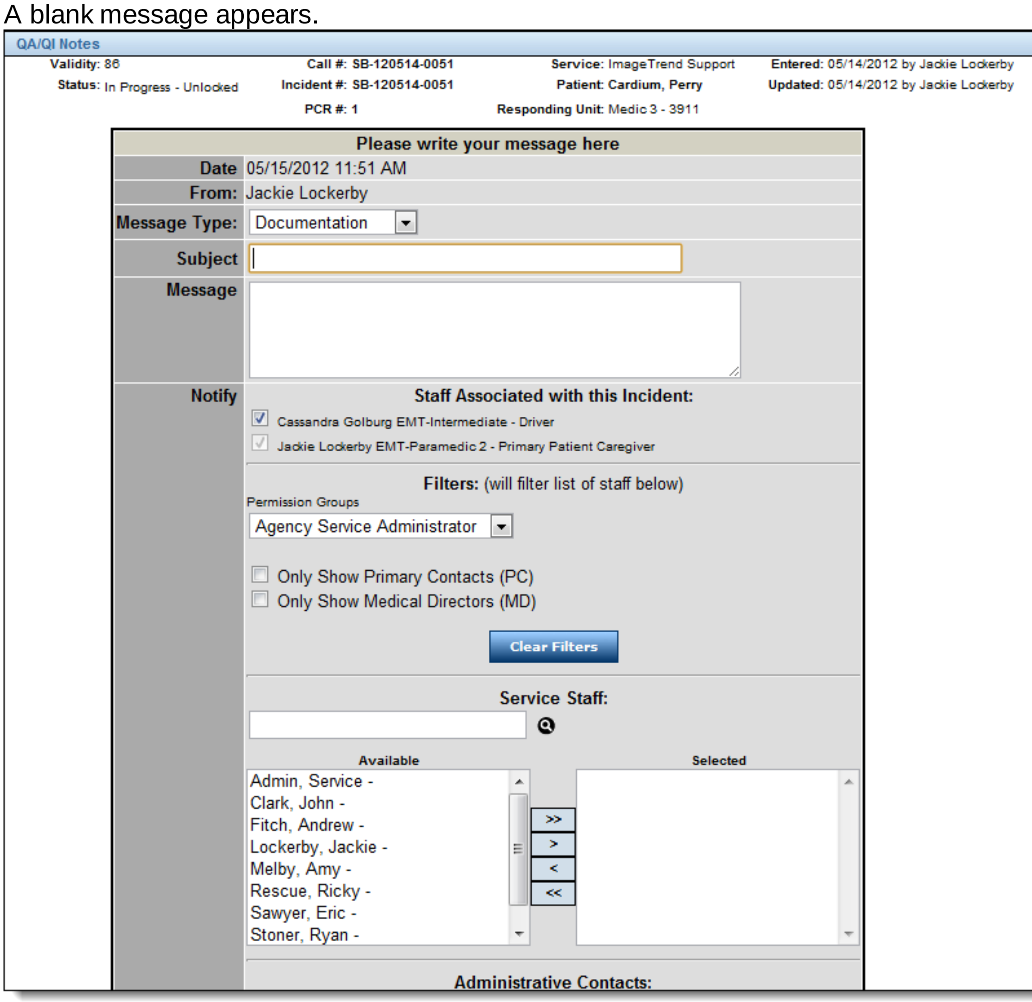
1. From the existing run form to which the note will pertain, from the run form toolbar, click *Actions* and *Add QA/QI Note.*



The *QA/QI Notes* window appears.

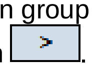
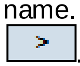


2. Click the *New Message* icon .
   A blank message appears.



3. From the *Message Type* drop down menu, select the category for this message.
4. In the *Subject* text box, type a name for the message.
5. In the *Message* text box, type the body of the note.
   NOTE: Information must be typed in the *Message* text box before the message can be sent.
6. In the *Notify* section, select the names of staff who should receive this message in their State Bridge inbox.
   NOTES:
   Staff already associated with the incident will be selected in the *Staff Associated with this*

Incident section.
Other staff for the service will be listed in the *Service Staff* scroll list. You can use the fields in the *Filters* section to narrow down which staff should be displayed in the *Service Staff* section.
System administrators will be listed in the *Administrative Contacts* section.
Multiple staff members can be selected from this section by pressing and holding *Ctrl* while clicking each name.
A link to the incident report will also be included in the message.

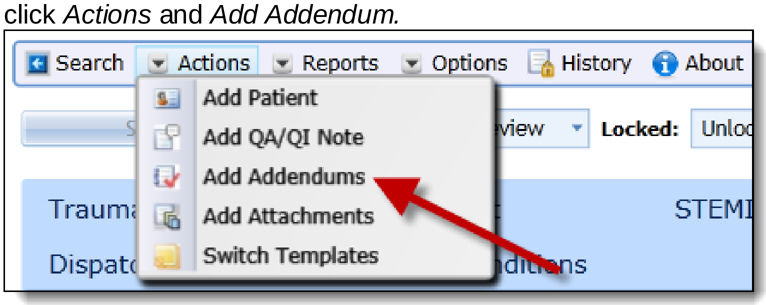
a. To add staff from the service associated with this run form,
    i. From the *Available* scroll list for the *Service Staff* section, select the staff members
    ii. Click the *Add* icon .
    NOTE: Multiple staff members can be selected from this section by pressing and holding *Ctrl* while clicking each name.
b. To add all staff from this service who are in a specific permission group,
    i. From the *Available* scroll list in the *Permission Groups* section, select the desired permission group.
    ii. Click the *Add* icon .
    NOTE: Multiple permission groups can be selected from this section by pressing and holding *Ctrl* while clicking each group name.
c. To include an administrative contact for the system in this message,
    i. From the *Available* scroll list in the *Administrative Contacts* section, select the desired name.
    ii. Click the *Add* icon .
    NOTE: Multiple names can be selected from this section by pressing and holding *Ctrl* while clicking each name.

7. To send emails with the message to all selected staff at the email address listed in their profile, select the *Send an email in addition to the Inbox, if available* checkbox.
8. To post the note, click *Submit.*

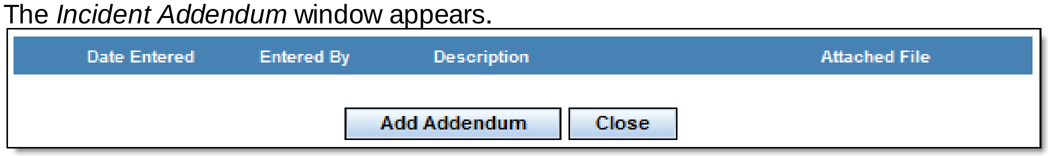
Adding Addendums

Run reports are locked after a specific amount of time to prevent additional changes from being made. In the case that additional information must be added, however, personnel with permissions can attach a separate file containing that information. This file could be a Word or Excel document, or any other document type preferred by the service.

1. From the run report to which the addendum should be added, from the run form toolbar, click *Actions* and *Add Addendum.*



The *Incident Addendum* window appears.

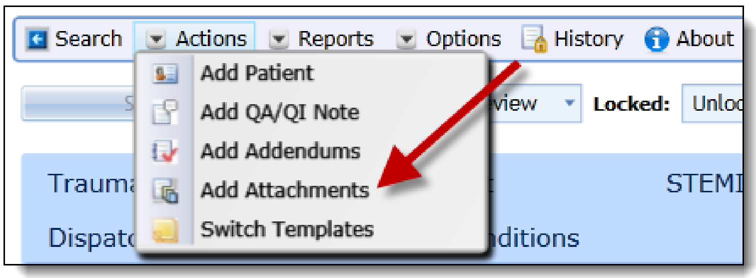


2. Click *Add Addendum.*
3. In the *Description* text box, type any additional important information about the addendum.
4. **OPTIONAL:** From the *File* section, type the path to the file or click *Browse* to locate and select the file.
5. When finished, click *Submit.*

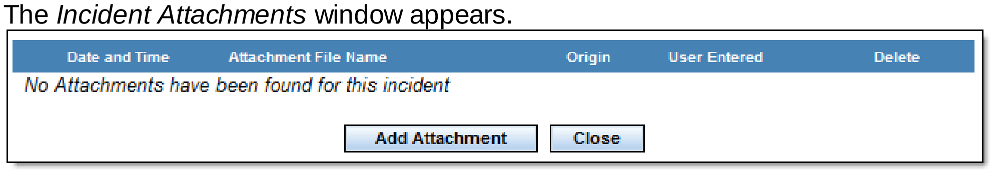
Adding Attachments

Additional files can assist with the complete documentation of incidents, including photographs or scanned documents. System users can attach files to the run report.

1. From the run report to which the file should be attached, from the run form toolbar, click *Actions* and *Add Attachment.*



The *Incident Attachments* window appears.



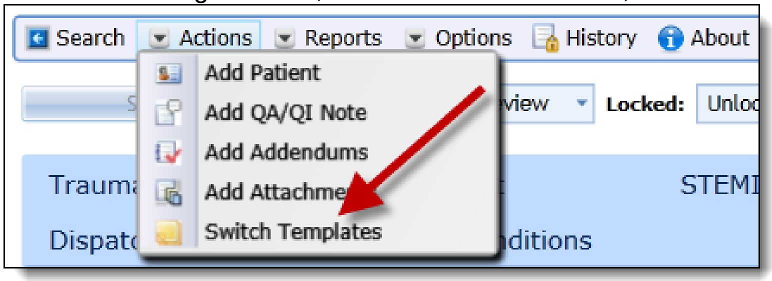
2. Click *Add Attachment.*
3. Click *Choose File.*
   The *Choose File* dialog box appears.
4. Navigate to and select the desired file.
5. Click *Open.*
   The file is selected and the *Choose File* dialog box closes.
6. When finished, click *Submit.*
   The file is added as an attachment.

Switching Templates

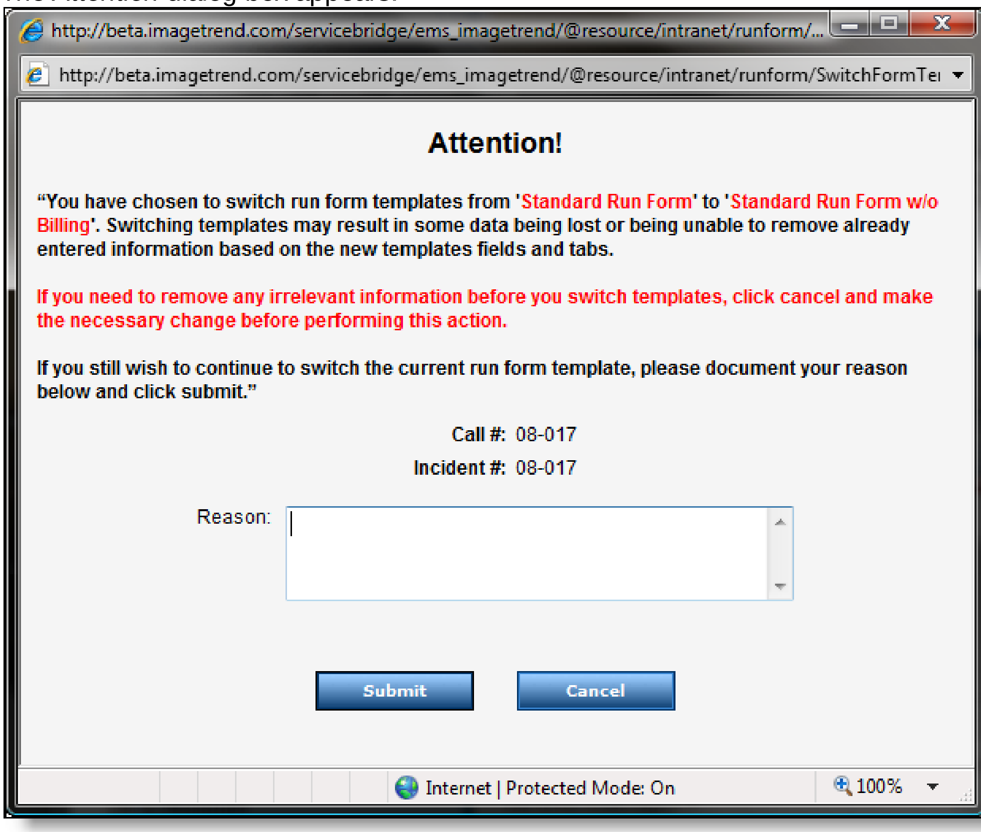
Run form templates can be switched in the middle of a run report. All information that should be copied to the new template should be saved, although not all information may carry over, depending on the new template selection. All information that should not be copied should be deleted from the run form.

This option may not be available if the user does not have the correct permissions, if only one run form template is available for the service or if the run has been locked at some point. If the run form template is switched, this action will be noted in the history for this run.

1. From the existing run form, from the run form toolbar, click *Actions* and *Switch Template.*



2. Select the desired new template.
   The *Attention* dialog box appears.



3. In the *Reason* text box, type the explanation.
4. To change the run form template, click *Submit.*

6.4 Adding a New Incident Report with Standard Run Forms

Users with the correct permissions can complete run forms using the State Bridge. Services may choose to set up templates for common occurrences with a different layout. Standard run forms use the traditional State Bridge layout and features.

Incident Report Tips

The tabs for each form are coded to inform users about their status. Tabs that have required information missing will be red, the tab currently displayed will be orange, and tabs that have not been viewed will be blue. Within red tabs, important fields that have not been completed will be listed at the top of the page. Administrators with the correct permissions can set up validation rules to designate which fields are important and how much will be taken off of the form's validity score when they are left incomplete. The *Incident* tab must be submitted before validity information appears.

WARNING: Before moving to a new tab, be sure to save. Unsaved changes will be lost when moving between tabs.

After the first tab of the run form is submitted, the run form toolbar will appear at the top of the page. This toolbar provides options for adding additional components to the run form (e.g., addendums or attachments), viewing reports that can be printed regarding this run report, and opening a *Times* pop up box that will display the incident times for reference on any tab.

In addition to the run form toolbar, the *Mark Run As Completed* button will appear on the right side at the top of the page. This allows you to mark this run as completed for audit tracking at any time. Depending on your service's setup, this may also lock the run for editing and change its status to completed.

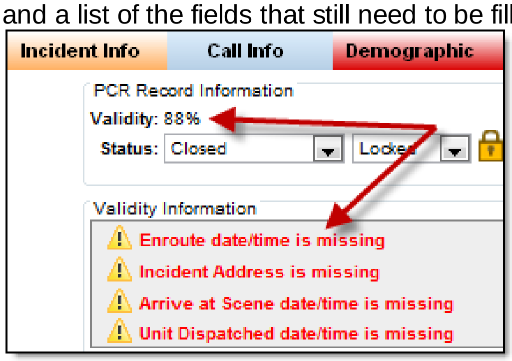
Understanding Validity

Validity is a feature that will inform you of when you have left any required fields in the run form incomplete. Based on the number of incomplete fields and the importance of those fields, your run form will be assigned a validity score that will be displayed at the top of the page once you save your run form. As you complete more fields, the score will go up.

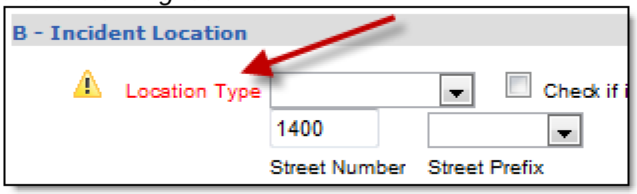
There will be multiple visual clues throughout the run form as to where required fields have been left blank.

- Each tab is color coded to indicate its status for validity. The orange tab is the one you currently have open; blue tabs have all required fields completed and red tabs have required fields that still need to be completed.

- At the top of each tab you will see a section detailing the current validity of this run form and a list of the fields that still need to be filled in.



- Within the run form, any incomplete field that is required will be displayed with red text and a *Warning* icon.

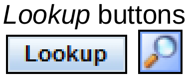


When the run form is complete, the validity score will be at 100%, all tabs will be blue and there will be no red fields or *Warning* icons.

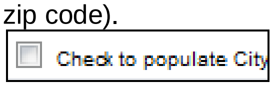
Run Form Tools

The State Bridge run form provides you with some tools to make it easier for you to complete your run forms.

- *Lookup* buttons allow you to search for and select information from a list.

- *Check to Populate* checkboxes will automatically complete some information based on what you have already filled in (e.g., completing the city and state information based on a zip code).

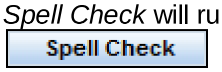
- *AutoComplete* buttons will cause the system to search for matching records as you type (e.g., searching for a code matching the word or numbers you begin to type) whenever the button is selected.

- *Help* icons will provide additional information about the section when you place your mouse over them without clicking.

- *Spell Check* will run a spell checker on your narratives or other text fields with the feature,

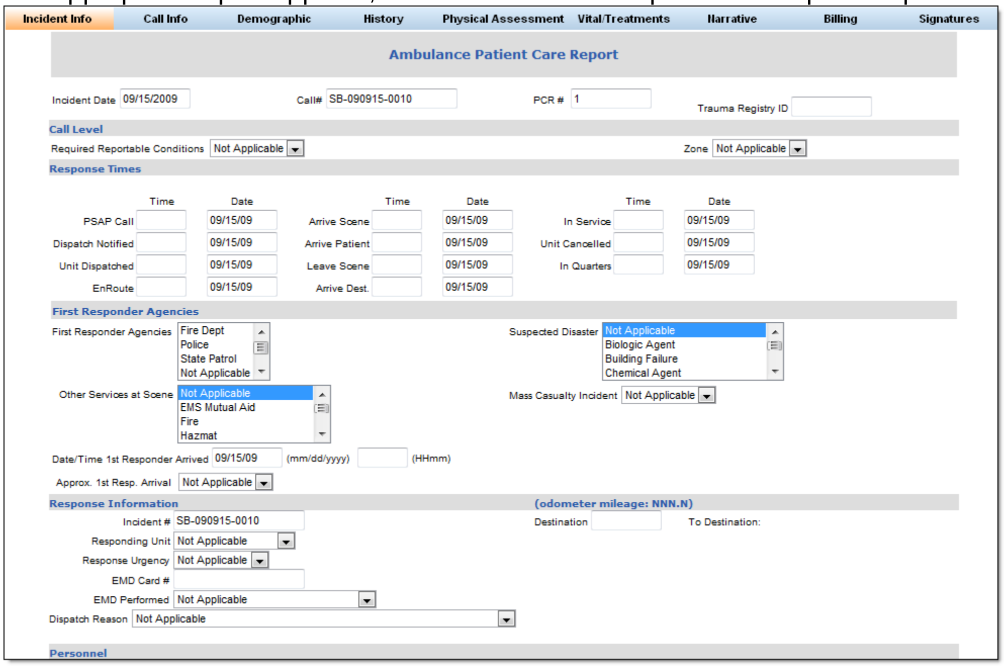
  

Completing a New Incident Report

Each tab of the run form can be completed in any order after the first tab with basic incident information is submitted.

1. From the upper left, click *My Service.*
2. Under the *Incidents* tab, click *Add Run.*
   The *Run Form Template Selection* page appears.
3. From the *EMS Standard Run Templates* section, select the appropriate template for the incident.

The appropriate report appears, with tabs across the top for each required report.



4. Using the provided fields and tabs, enter all information pertaining to the EMS incident.
   HINT: When times are entered that span more than one day (e.g., changing from 23:55 to 00:04), the dates will be changed automatically to reflect that date change.
   NOTE: Be sure to click *Save/Submit Form* before opening a new tab or all new data will be lost.
5. Click *Save/Submit Form.*
   NOTE: All tabs can now be worked with in any order.
   WARNING: Be sure to save tabs before moving to a new tab so no information is lost.
6. In the *Call Info* tab, enter information about the destination and response.
7. In the *Demographic* tab, enter demographic information about the patient.
   HINT: To automatically fill in information for a patient who is in the *Repeat Patient* database, click *Repeat Patient* and select the desired patient.
8. In the *History* section, enter information about the patient's medical history.
   HINT: As medications are typed into the *Medication* fields, a list will appear of all medications that match the text. This drop down will also include responses if patients deny medication or allergies.
9. In the *Physical Assessment* section, enter information about the physical state of the patient.
   HINTS: Select the body type and click on each portion of the body that requires an assessment to enter information.
   Use the fields below the displayed image to enter additional information.
   NOTE: The time will be entered by default as the Arrived at Patient time.
10. When finished, click *Save.*
11. **OPTIONAL:** To enter injury information, from the top of the *Physical Assessment* page, click *Injury Assessment* and use the image to enter information.
    HINTS:
    Click on each portion of the body that requires an assessment to enter information.
    Use the fields below the displayed image to enter additional information.
12. When finished, click *Save.*

13. **OPTIONAL:** To enter information about burns, from the top of the *Physical Assessment* page, click *Burn Assessment* and use the image to enter information.
    HINTS:
    Click on each portion of the body that requires an assessment to enter burn information. Click once for a first degree burn, twice for a second degree burn, and three times for a third degree burn. Clicking once more after indicating a third degree burn will remove the assessment from that area.
14. When finished, click *Save.*
15. From the *Vitals/Treatments* tab, enter information about medications, procedures, vitals EKGs and treatment.
    HINTS:
    Click the buttons across the top of the page to switch what information is being entered. When finished with a section, before adding the next piece of information, click *Save (Feature).*
    Times for vitals, medications, EKG and procedures will be assigned to the Arrived at Patient time.
    The medications and procedures available may change based on the user performing the act.
    When medications are added, the dosage will be automatically entered as the default value.
16. In the *Narrative* section, complete the required fields to generate a narrative.
    HINT: To automatically generate a narrative (if permissions allow), from the *Narrative* section, use the drop down menu to select the desired type of narrative and click *Set Narrative.*
17. From the *Billing* tab, enter information about billing.
18. From the *Signatures* tab, complete the necessary fields for signatures.
19. To add additional information to the run form, from the run form's toolbar, click *Form Options* and the selected option.
    HINT: For more information, please refer to *Additional Run Form Options.*

6.5 Additional Standard Run Form Options

Once a run form is completed, system users can add additional information, including QA/QI notes, addendums or attachments. In addition, a new patient can be added to the incident, which will create a patient care report attached to the initial incident report.

NOTE: Be sure to complete the first run form before adding a new patient.

Adding a Patient to a Run Report

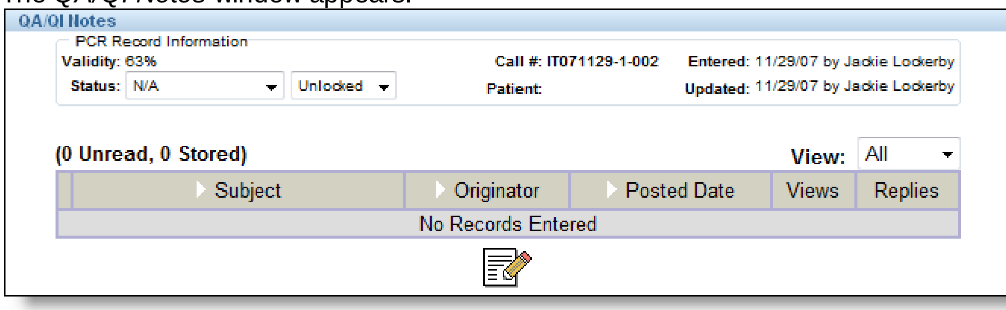
When a patient is added to an existing run form, a new patient care report will be created for the patient and attached to the original incident report. Patient-specific information can be recorded in this new patient care report. This option should not be completed until the run form is otherwise finished.

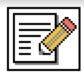
1. From the existing run form to which the patient care report should be attached, from the run form toolbar, click *Form Options* and *Add Patient.*
2. In the *New Patient Care #* text box, type the number for this patient care report.
   NOTE: These numbers will differ depending on your service's requirements.
3. Click *Add New Patient To this Incident.*
   A new patient care report appears.
4. Using the provided fields, complete the patient care report for the new patient as indicated in *Adding a New Incident Report.*

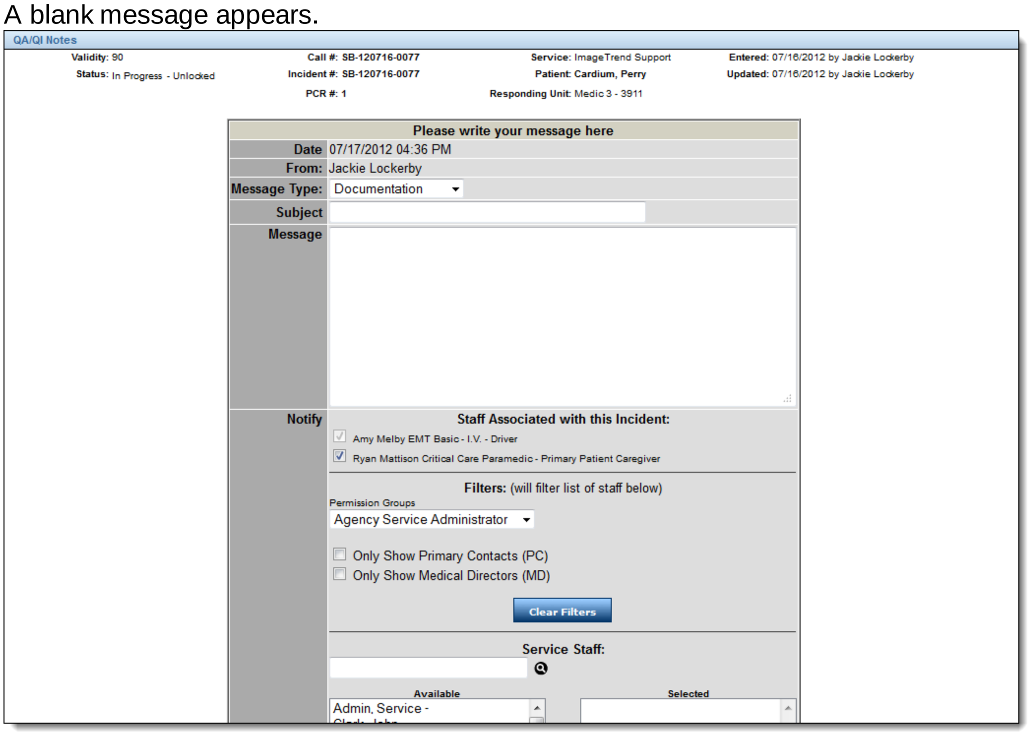
Adding QA/QI Notes to a Run Report

Administrators can add notes to completed run reports with comments for the personnel included in the incident. These notes will be attached to the incident and sent to the inboxes of any personnel included.

1. From the existing run form to which the note will pertain, from the run form toolbar, click *Form Options* and *Add QA/QI Note.*
   The *QA/QI Notes* window appears.



2. Click the *New Message* icon .
   A blank message appears.



3. From the *Message Type* drop down menu, select the category for this message.
4. In the *Subject* text box, type a name for the message.
5. In the *Message* text box, type the body of the note.
   NOTE: Information must be typed in the *Message* text box before the message can be sent.
6. In the *Notify* section, to add additional staff members who should receive this message in their State Bridge inbox,
   NOTE: Staff already associated with the incident will be selected in the *Staff Associated with this Incident* section.
   Other staff for the service will be listed in the *Service Staff* scroll list. You can use the

fields in the *Filters* section to narrow down which staff should be displayed in the *Service Staff* section.
State administrators will be listed in the *Administrative Contacts* section.
Multiple staff members can be selected from this section by pressing and holding *Ctrl* while clicking each name.
A link to the incident report will also be included in the message.

   a. To add staff from the service associated with this run form,
      i. From the *Available* scroll list for the *Service Staff* section, select the staff members
      ii. Click the *Add* icon.
      NOTE: Multiple staff members can be selected from this section by pressing and holding *Ctrl* while clicking each name.
   b. To add all staff from this service who are in a specific permission group,
      i. From the *Available* scroll list in the *Permission Groups* section, select the desired permission group.
      ii. Click the *Add* icon.
      NOTE: Multiple permission groups can be selected from this section by pressing and holding *Ctrl* while clicking each group name.
   c. To include an administrative contact for the system in this message,
      i. From the *Available* scroll list in the *Administrative Contacts* section, select the desired name.
      ii. Click the *Add* icon.
      NOTE: Multiple names can be selected from this section by pressing and holding *Ctrl* while clicking each name.

7. To send emails with the message to all selected staff at the email address listed in their profile, select the *Send an email in addition to the Inbox, if available* checkbox.
8. To post the note, click *Submit.*

Adding Addendums

Run reports are locked after a specific amount of time to prevent additional changes from being made. In the case that additional information must be added, however, personnel with permissions can attach a separate file containing that information. This file could be a Word or Excel document, or any other document type preferred by the service.

1. From the run report to which the addendum should be added, from the run form toolbar, click *Form Options* and *Add Addendum.*
   The *Incident Addendum* window appears.
2. Click *Add Addendum.*
3. In the *Description* text box, type any additional important information about the addendum.
4. **OPTIONAL:** From the *File* section, type the path to the file or click *Browse* to locate and select the file.
5. When finished, click *Submit.*

Adding Attachments

Additional files can assist with the complete documentation of incidents, including photographs or scanned documents. System users can attach files to the run report.

1. From the run report to which the file should be attached, from the run form toolbar, click *Form Options* and *Add Attachment.*
   The *Incident Attachments* window appears.
2. Click *Add Attachment.*

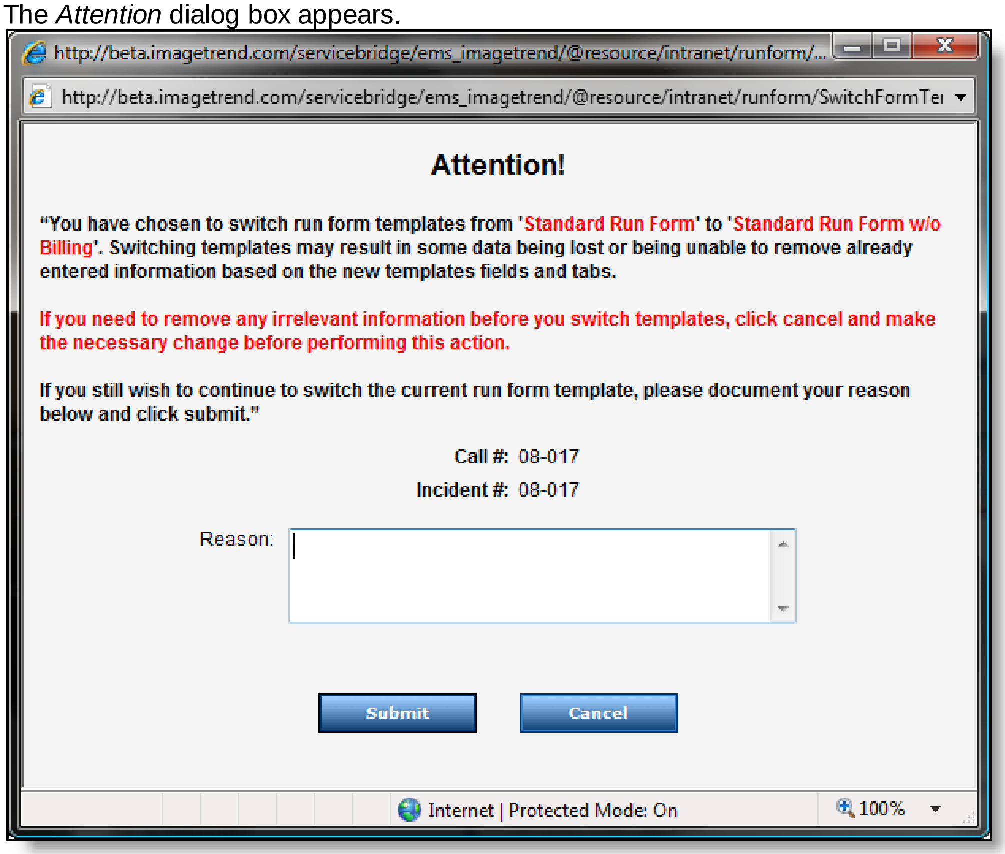
3. Click *Choose File.*
   The *Choose File* dialog box appears.
4. Navigate to and select the desired file.
5. Click *Open.*
   The file is selected and the *Choose File* dialog box closes.
6. When finished, click *Submit.*
   The file is added as an attachment.

Switching Templates

Run form templates can be switched in the middle of a run report. All information that should be copied to the new template should be saved, although not all information may carry over, depending on the new template selection. All information that should not be copied should be deleted from the run form.

This option may not be available if the user does not have the correct permissions, if only one run form template is available for the service or if the run has been locked at some point. If the run form template is switched, this action will be noted in the history for this run.

1. From the existing run form, from the run form toolbar, click *Form Options* and *Switch Template.*
2. Select the desired new template.
   The *Attention* dialog box appears.

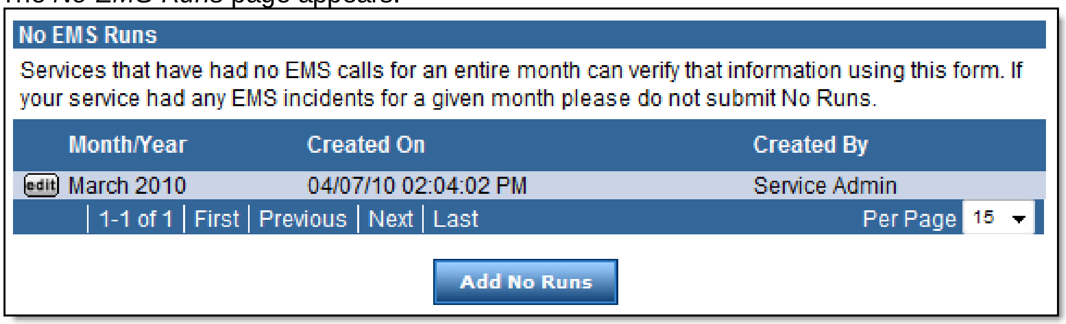


3. In the *Reason* text box, type the explanation.
4. To change the run form template, click *Submit.*

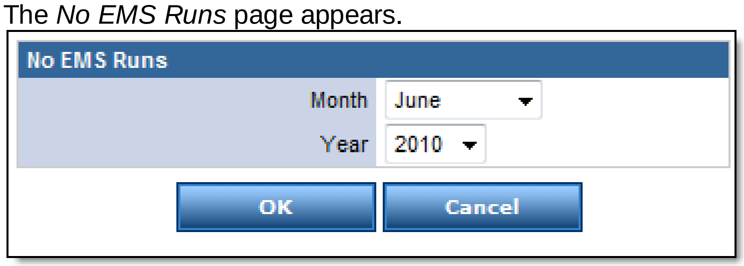
6.6 Recording Months with No Runs to Report

At times, your service may have no fire calls to report to the state. The State Bridge allows you to record this and submit that information.

1. From the upper left, click *My Service.*
2. Under the *Modules* tab, click *No Runs to Report.*
   The *Document No Runs to Report* page appears.
3. Click *No EMS Runs.*
   The *No EMS Runs* page appears.



4. Click *Add No Runs.*
   The *No EMS Runs* page appears.



5. From the *Month* and *Year* drop down menus, select the time in which these calls occurred.
6. When finished, at the bottom of the page, click *OK.*
   The record of no EMS calls is saved.

6.7 Viewing and Editing Past Run Reports

System users can view and search through any run reports that they have created or uploaded to the State Bridge system. Based on their level of permissions, some system users may be able to view run reports submitted by other users within their service. Within the time frame set by the user's service, these run forms may be altered to contain more complete or correct information, but after this time frame the user will only be able to view the static report.

You can search for past run reports either from the Incident List or the *Run History* page, depending on your preference. The Incident List offers several improved features including the ability to save search criteria and improved search speed, while the *Run History* page offers a familiar interface for those who may have worked with it in past versions of Service Bridge.

Working with the Incident List

The Incident List feature is a new view allowing you to search, view and filter your incident forms to find the ones you are looking for. The Incident List provides several additional tools for finding incidents, as well as a faster load time.

Overview of Incident List Options

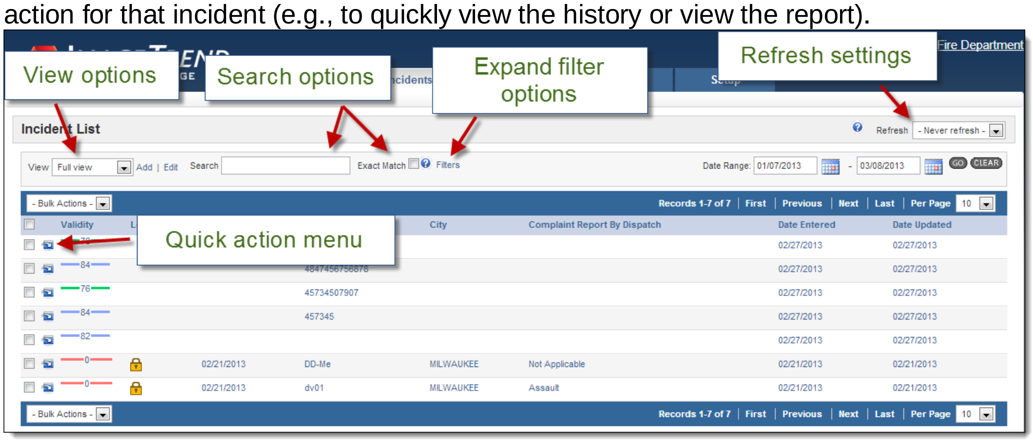
The Incident List page provides you with a collection of tools you can use to find the appropriate incident(s) in your system.

Views allows you to create, customize and save your view to use again when viewing the incident list. You can create criteria that incidents must meet in order to be displayed and customize which columns you see when that view is applied.

The **search options** allow you to either search for the exact match, when the *Exact Match* checkbox is selected, or close variations of the search criteria (e.g., if you type "Lake," you could see results for Lakeville and Lake City). The **filters** options allow you to enter more specific search criteria.

You also have the option to select how often the page will refresh to display new incidents meeting your view and search criteria.

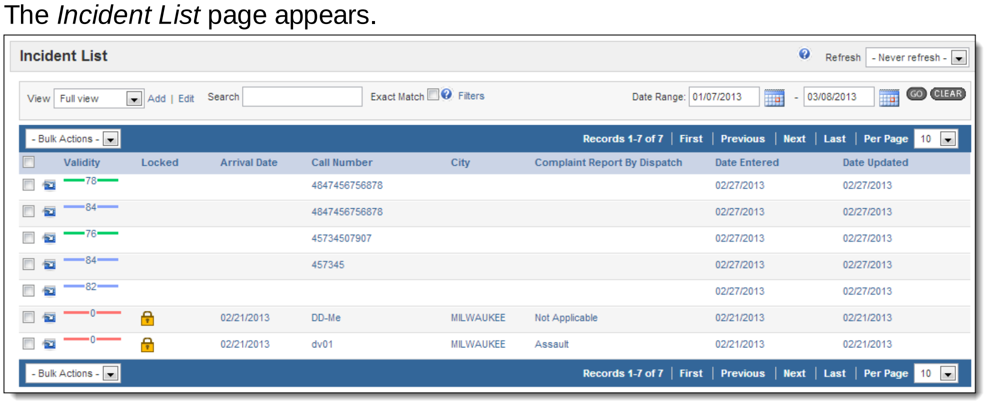
The **Quick Action menu** available for each incident allows you to quickly perform an action for that incident (e.g., to quickly view the history or view the report).



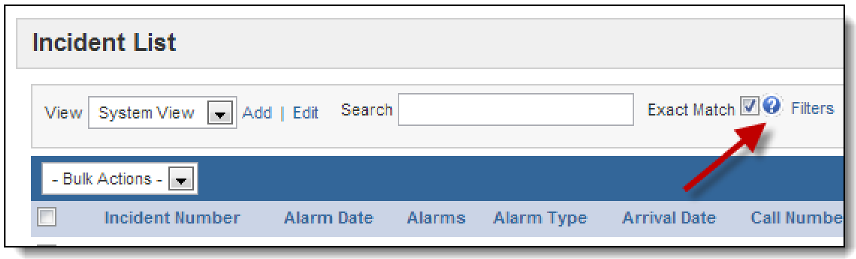
Searching for Incidents from the Incident List

In order to search for incidents, you can use any of the tools available from the *Incident List* page.

1. If necessary, in the upper right, click *My Service.*
   The home page for your agency appears.
2. Under the *Incidents* tab, select *Incident List.*
   The *Incident List* page appears.

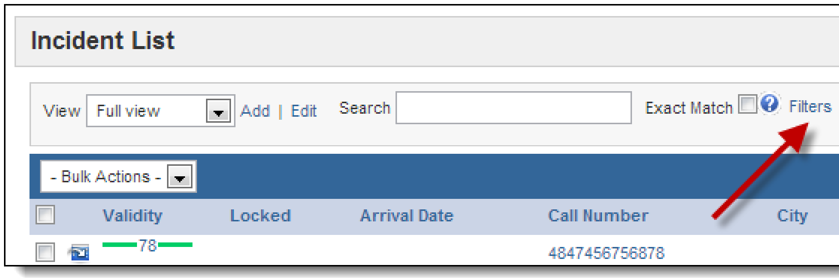


3. To apply a view to determine which incidents appear, from the *View* drop down menu, select the appropriate view.
   NOTE: The *Default View* option will provide the same view options as the default view of the *Run History* page did previously.
   The page refreshes to display the information set up in that view.
4. To perform a basic search,
   a. In the *Search* text box, type your search terms.
      HINT: The *Search* text box will search different options based on the columns that are displayed for the view you are using. For more information about which columns will be searched, click the *Help* icon to the right of the *Search* text box.

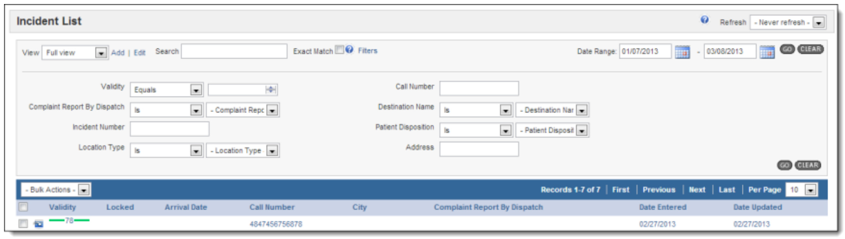


   b. To set the search up to return only incidents that match your entire entry in the search text box (e.g., entering *Lake City* would return only incidents with *Lake City,* not incidents with *Lakeville* or *Lake of the Woods,* because it is searching only for values that include the full text of *Lake City*), select the *Exact Match* checkbox.
      OR
      To set the search up to return incidents that include your search terms (e.g., entering *Lake City* would return *Lake City, Lakeville* and *Lake of the Woods,* because it is searching for either *Lake* OR *City*), deselect the *Exact Match* checkbox.
      NOTE: This *Exact Search* option applies only to the *Search* text box, not to the filters or additional search options covered in later steps.
   c. Click *Go.*
      The page is narrowed down to display only incidents matching your search.
5. To search based on date,
   a. In the *Date Range* text boxes, type the first and the last date you want to view incidents within.
      OR
      To select the date from a calendar, click the *Calendar* icon and select the desired date.
      OR
      To avoid setting a start or end date for the search, leave the corresponding text box blank.
   b. Click *Go.*
      NOTE: If you have also entered other search criteria, you will see only incidents that match both those search criteria and the date criteria set here.
6. To perform an advanced search,

a. From the right of the *Search* text box, click the *Filters* link.



Additional search filters are displayed.



b. Enter any search criteria in the new search fields.

NOTE: Some filters have drop down menus that allow you to select how you want your search terms to match the criteria you enter; for example, you could say that you want the incidents with validity scores less than, greater than or equal to a certain number. If there is not a drop down menu to select this kind of information, the search will automatically look for values that contain the full text of your entry. So, searching for *12345* would bring back *12345, 012345* and *123456,* but not *123 45* or *123645.*

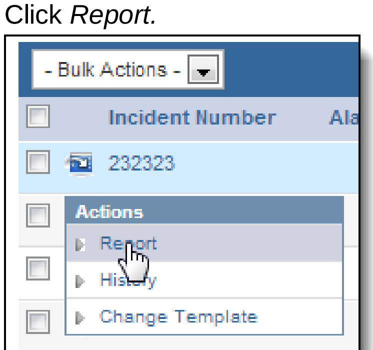
c. When finished, click *Go.*

NOTE: If you have also entered other search criteria, you will see only incidents that match both those search criteria and the advanced search criteria set here.

7. **OPTIONAL:** At any time, to clear your existing search and return to the default view, click *Clear.*
8. To open an incident, click on any of the blue links for that incident.
9. To view a report for an incident,

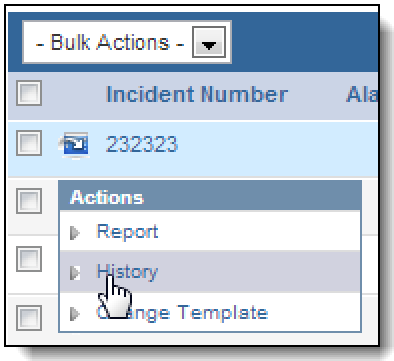
   a. Click the *Quick Actions* icon for the report.
   A drop down menu appears.

   b. Click *Report.*

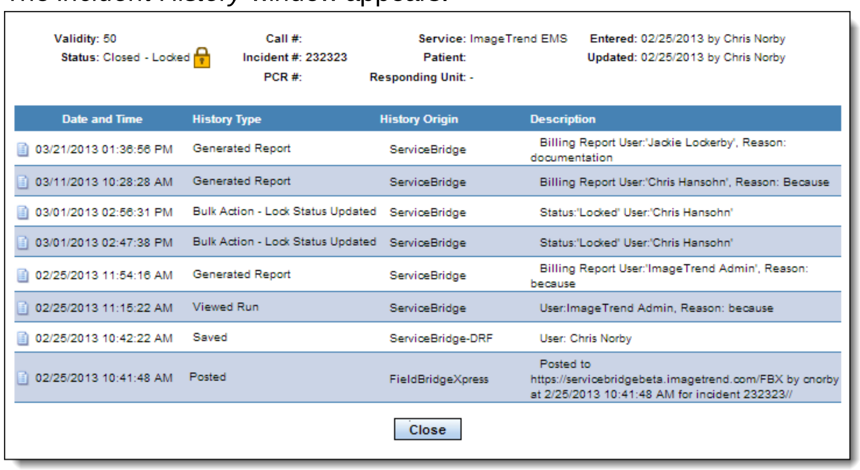


If prompted, enter a reason for viewing the report and click *Submit.*
The report appears.

10. To view the audit trail history of this report,
    a. Click the *Quick Actions* icon for the report.
    A drop down menu appears.
    b. Click *History.*



The *Incident History* window appears.



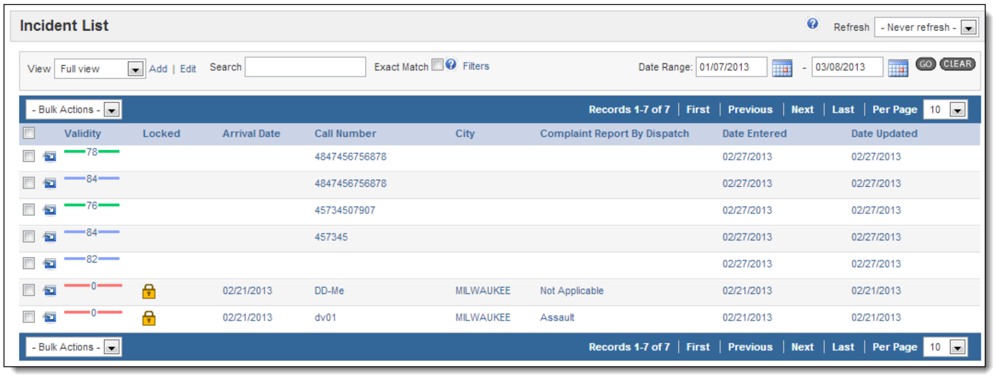
Date and Time	History Type	History Origin	Description
03/21/2013 01:36:56 PM	Generated Report	ServiceBridge	Billing Report User:'Jackie Lockerby', Reason: documentation
03/11/2013 10:28:28 AM	Generated Report	ServiceBridge	Billing Report User:'Chris Hansohn', Reason: Because
03/01/2013 02:56:31 PM	Bulk Action - Lock Status Updated	ServiceBridge	Status:'Locked' User:'Chris Hansohn'
03/01/2013 02:47:38 PM	Bulk Action - Lock Status Updated	ServiceBridge	Status:'Locked' User:'Chris Hansohn'
02/25/2013 11:54:16 AM	Generated Report	ServiceBridge	Billing Report User:'ImageTrend Admin', Reason: because
02/25/2013 11:15:22 AM	Viewed Run	ServiceBridge	User:ImageTrend Admin, Reason: because
02/25/2013 10:42:22 AM	Saved	ServiceBridge-DRF	User: Chris Norby
02/25/2013 10:41:48 AM	Posted	FieldBridgeXpress	Posted to https://servicebridgebeta.imagetrend.com/FBX by cnorby at 2/25/2013 10:41:48 AM for incident 232323//

Setting the Refresh Frequency

You can select how often you want the *Incident List* page to automatically refresh to find new incidents.

1. If necessary, in the upper right, click *My Service.*
   The home page for your agency appears.

2. Under the *Incidents* tab, select *Incident List.*
   The *Incident List* page appears.



3. From the upper right, from the *Refresh* drop down menu, select how often you want the page to automatically refresh.

Creating a View

Views allow you to create a set of criteria that incidents must meet in order to be displayed when that view is applied and also to customize which columns you see. You can create and save your own custom views that you can apply at any time when you're working with the incident list.

There are four different types of views: system views, service views, my views and the default view. Your ability to create and edit views is based on permissions. Users will only be able to create and edit views if they have the correct level of access to the *Incident List* page, and may be able to view only certain types of views based on their permissions.

System views are set up at the system level and only system administrators will be able to edit them, although everyone can view them.

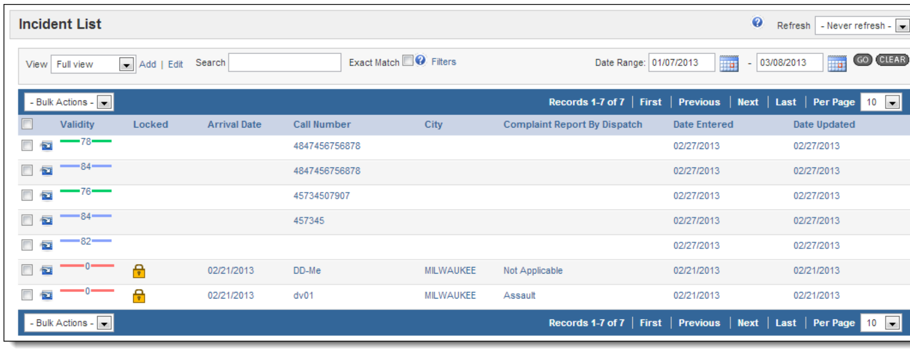
Service views are set up for a specific service by service administrators. Only service administrators will be able to edit these views, although anyone in that service can view them.

My views are created by you and can be edited by you at any time. Only you will be able to use and edit your views.

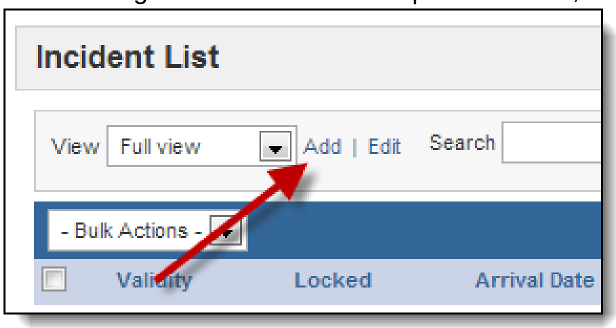
The **default** view includes all the columns that were included in the default view for the previous *Run History* page. You will not be able to edit this view, although you can use it to view the incident list at any time.

1. If necessary, in the upper right, click *My Service.*
   The home page for your agency appears.

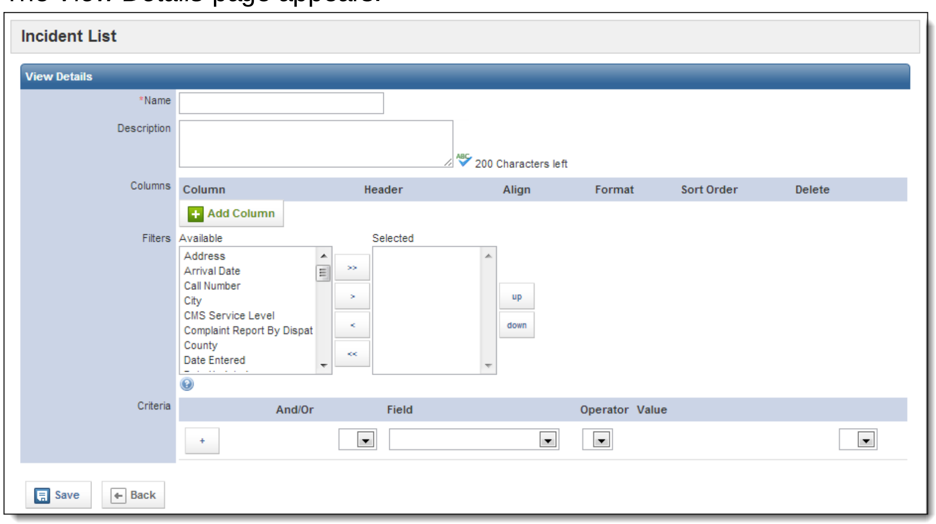
2. Under the *Incidents* tab, select *Incident List.*
   The *Incident List* page appears.



3. From the right side of the *View* drop down menu, click *Add.*

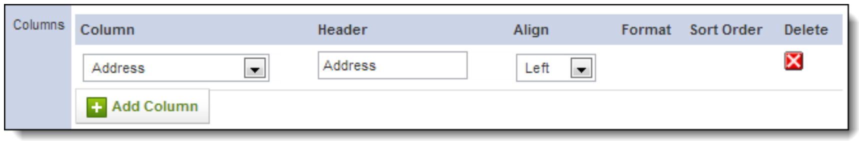


   The *View Details* page appears.



4. In the *Name* text box, type the name for this view.
   NOTE: This name is what you will see and select from the *View* drop down menu when you want to use this view again.
5. In the *Description* text box, type any additional descriptive details you want to save with this view.
   NOTE: This description will only be visible if someone opens this view for editing.
6. To set up an additional column of information to display on the incident list,

a. Click *Add Column.*
A new line appears.



b. From the *Column* drop down menu, select the field that you want to appear for this column.

c. **OPTIONAL:** To change the text that will appear in the column header, in the *Header* text box, type the desired header.

d. From the *Align* drop down menu, select the way you want the text in this column aligned.

e. If you want to change the formatting for the way the information appears, from the *Format* drop down menu, select the desired formatting.

HINT: This option will not be available for all columns. It will most commonly be used for dates; you could choose to display the date as 3/21/2013 or March 21, 2013.

f. If you have multiple columns, to move this one up or down in the order of where it will appear on the page, click the *Up* or *Down* button, as needed.

HINT: If you drag the column to a new position, make sure that you do not click within a field; clicking within a field will open that field for editing rather than selecting the field to move.

OR

Click within the row for a column and drag it to the desired position in the list.

7. To add additional filters to the page that you can use for advanced searches,
   a. In the *Filters* section, from the *Available* scroll list, select the first filter to add.
   b. Click the *Add* icon .
   c. Repeat steps a–b until all desired filters are added.
8. To set up criteria that will narrow down the incidents listed on this page, in the *Criteria* section,
   a. To group multiple pieces of criteria, from the first drop down menu, select the opening parenthesis.

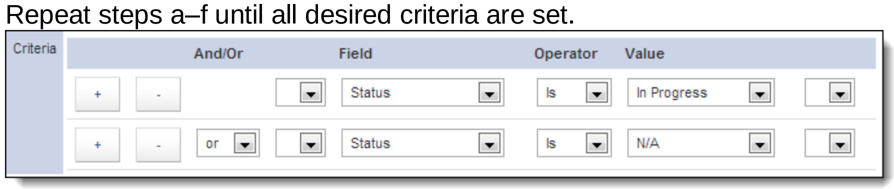
      HINTS:
      You generally only need to use parentheses if you will be creating multiple criteria where some are linked together with *And* (e.g., criteria A AND criteria B must be met) and others are linked together with *Or* (e.g., criteria C OR criteria D must be met).
      It may be easier for you to add parentheses at the end, once you have set up all your criteria already.
      If you want to enter multiple criteria, think of them like a math equation. Criteria will be applied in order unless parentheses are applied to group some of them together.
   b. From the *Field* drop down menu, select which field the criteria will be examining (e.g., *Status*).
   c. From the *Operator* drop down menu, select what is required of the selected value for the criteria to be met (e.g., *is, is before, begins with*).

d. From the *Value* drop down menu, select the option that the field should be compared against (e.g., *In Progress*).
The first criteria is complete.

e. To add an additional piece of criteria, click the *Add* icon .

f. To determine how this piece of criteria relates to the others, from the *And/Or* drop down menu, select *And* (i.e., this all pieces of criteria must be met for a record to display) or *Or* (i.e., one of the pieces of criteria must be met for a record to display).
NOTE: If using parenthesis to group criteria, note that the *And* and *Or* options will only be applied within the parentheses. If the option is applied to a single piece of criteria outside a group, it will act upon the individual piece of criteria and the group as a whole.

g. Repeat steps a–f until all desired criteria are set.



h. When finished with a group, from the last drop down menu, select the closed parenthesis.

9. When finished with all criteria, click *Save.*
The *Create View For* window appears.
10. From the drop down menu, select the type of view you are creating.
NOTE: Depending on your permissions, you may not be able to create all these types of views.

System Views
System views are available for all services in the system and can only be created or edited by individuals with system administrator-level permissions. All other users will be able to apply system views when looking at the incident list but will not be able to make any changes.

Service Views
Service views are available for the service the view is created in and can only be created or edited by individuals with service administrator-level permissions. All other users will be able to apply service views when looking at the incident list for that service but will not be able to make any changes.

My View
A view that is saved as a My View will be available only for you. You can use this kind of view to view the incident and you will be able to edit it at any time, but no one else will be able to access it.

11. Click *Save.*
The new view is created.

Keyboard Shortcuts for the Incident List

Keyboard shortcuts allow you to quickly perform an action within the incident list by pressing certain keys on your keyboard.

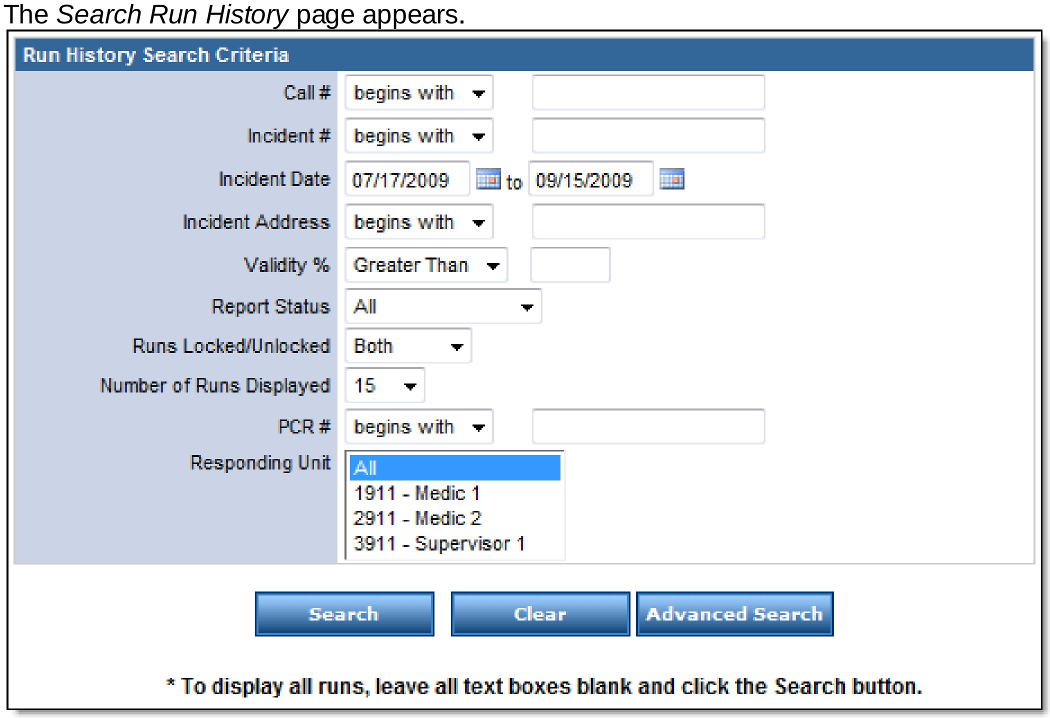
Keyboard Shortcut	Action
Enter	Refreshes the page and keeps your current search and filter options applied
Esc	Refreshes the page and clears any current search and filter options
→ (right arrow)	Opens the next page of results on the incident list
← (left arrow)	Opens the previous page of results on the incident list

Working with Run History

Runs that are locked to prevent further editing will display a *Locked* icon and will have their status set to *Completed.*

To view past run reports:

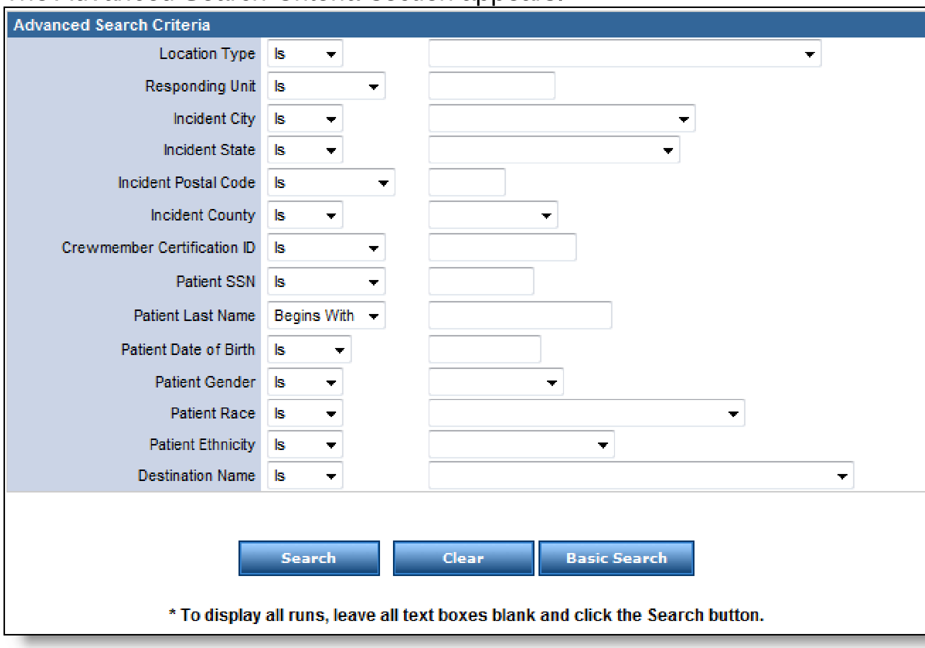
1. From the top left, click *My Service.*
2. Under the *Incidents* tab, select *Run History*.
   The *Search Run History* page appears.



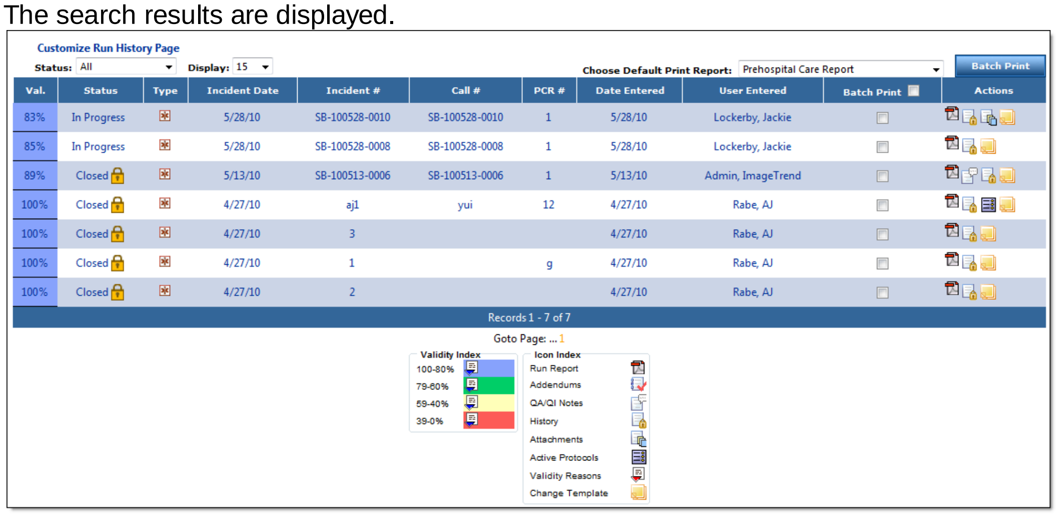
3. Using the provided fields, enter all criteria to narrow down the reports that should be displayed.

HINT: To display all runs entered by the signed-in user, make sure that the *Incident Date* text boxes display appropriate dates and that all other fields are empty of criteria.

4. To search by more specific criteria,
   a. Click *Advanced Search.*
      The *Advanced Search Criteria* section appears.



   b. In the *Advanced Search Criteria* section, enter all additional search terms.
5. When finished, to display a list of all run reports created by the signed-in user matching the set criteria, click *Search.*
   The search results are displayed.



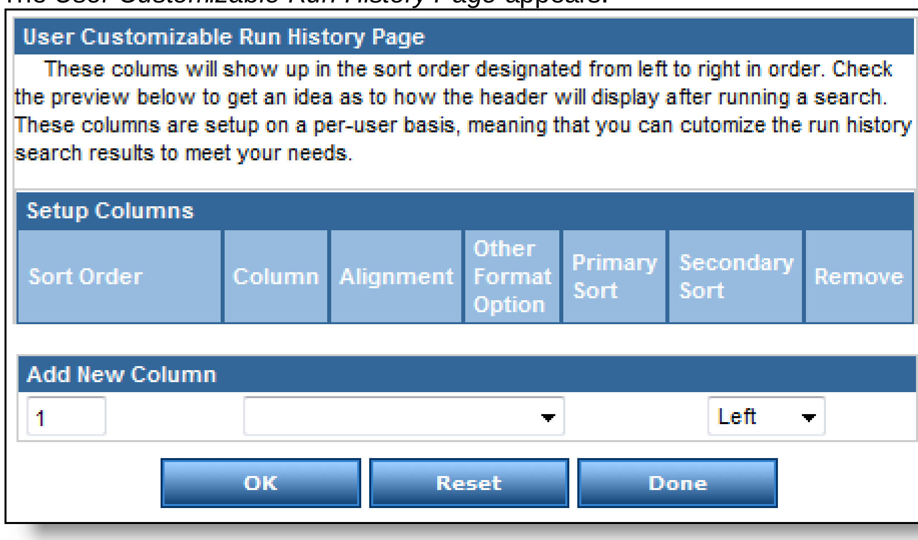
6. To temporarily show only certain results within the list, use the drop down menus at the top of the window to select the criteria by which to filter.
7. To sort the results by a particular heading, click the desired heading. To reverse the order that the records are sorted by (e.g., to switch from sorting A–Z to sorting Z–A), click the heading again.
8. To view a particular record, click any of the linked text in that record.
9. **OPTIONAL:** To edit the record,
   a. Using the tabs on the top of the run form, navigate to the page with the information to be changed.
   b. Using the provided fields, change any desired information.

c. Before closing that tab, click *Save/Submit Form.*
d. Repeat steps a–c until all desired changes have been made.

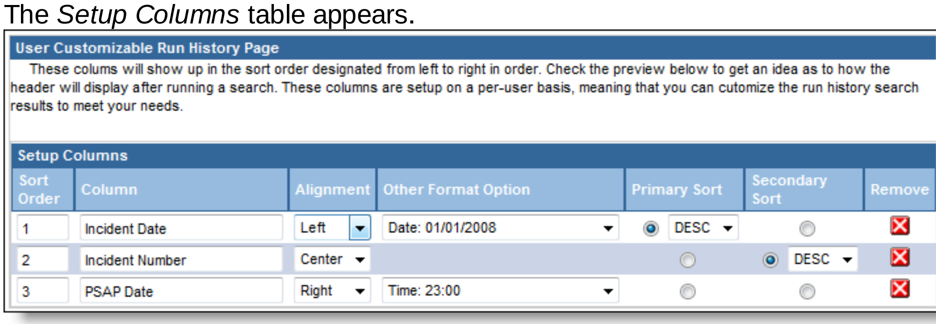
Editing the Run History Display Options

The columns that display information about the records on the *Run History* page can be configured to display the information most relevant to your needs. As each configuration option is set, a preview will appear at the bottom of the page for the new configuration.

1. From the *Run History* page, click the *Customize Run History Page* link.
   The *User Customizable Run History Page* appears.



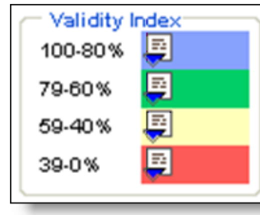
2. To select a new column to be displayed, from the *Add New Column* section, from the first drop down menu, select the desired column.
3. From the second drop down menu, select where the new column should be added to the page in relation to the existing columns.
4. Click *OK.*
   The *Setup Columns* table appears.



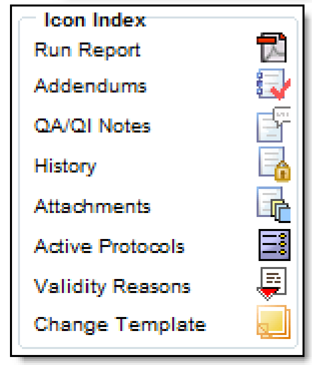
5. To change the text at the top of the column, in the *Column* column, type the new text.
6. To set a column as the first column that records will be sorted by, select the corresponding *Primary Sort* option and select the desired sort order.
7. To set a column as the second column that records will be sorted by, select the corresponding *Secondary Sort* option and select the desired sort order.
8. When finished, click *OK.*

Working with Run History Results

The *Run History* report contains basic information about the displayed run. Clicking on the color-coded *Validity*  icon, incident number, call number, or PCR number will open the corresponding Patient Care Report.

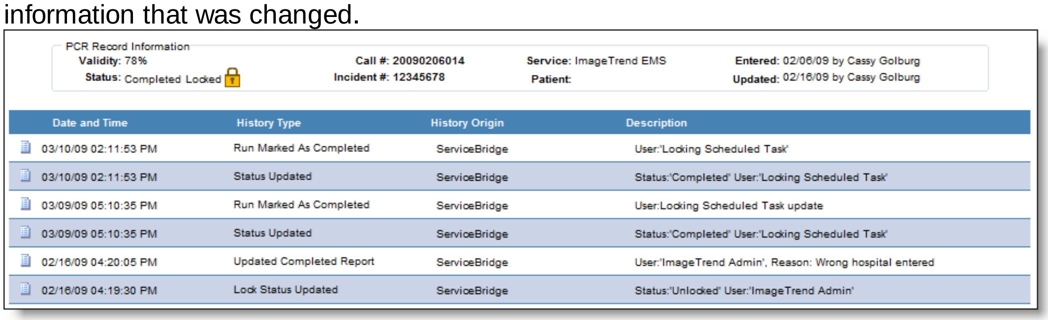


Each run report listed in the search results will show the incident report's validity with both a percentage and a color. A validity index, which defines the validity associated with each color, can be found at the bottom of the *Run History* screen. These colors provide an at-a-glance method to determine the validity of run reports.



The *Actions* column contains icons to inform users of all additional documentation related to the run report. The icon index at the bottom of the run history page defines the actions column. If a call has an addendum, QA/QI note, active protocol, documented validity reason or attachment associated with it, the appropriate column will be displayed in the corresponding row for the call record. All calls will have a *Run Report* icon and a *History* icon associated with them.

Clicking the *History* icon  will bring up the history audit trail for this run report. This will display a record of all personnel who accessed the report based on their login information and document any information that was changed.



PCR Record Information
Validity: 78% | Call #: 20090206014 | Service: ImageTrend EMS | Entered: 02/06/09 by Cassy Golburg
Status: Completed Locked | Incident #: 12345678 | Patient: | Updated: 02/16/09 by Cassy Golburg

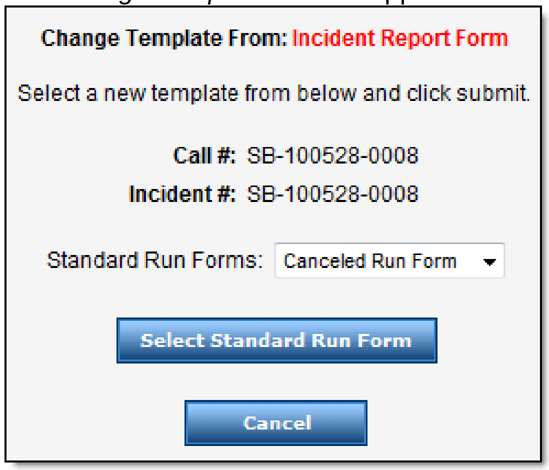
Date and Time	History Type	History Origin	Description
03/10/09 02:11:53 PM	Run Marked As Completed	ServiceBridge	User:'Locking Scheduled Task'
03/10/09 02:11:53 PM	Status Updated	ServiceBridge	Status:'Completed' User:'Locking Scheduled Task'
03/09/09 05:10:35 PM	Run Marked As Completed	ServiceBridge	User:Locking Scheduled Task update
03/09/09 05:10:35 PM	Status Updated	ServiceBridge	Status:'Completed' User:'Locking Scheduled Task'
02/16/09 04:20:05 PM	Updated Completed Report	ServiceBridge	User:'ImageTrend Admin', Reason: Wrong hospital entered
02/16/09 04:19:30 PM	Lock Status Updated	ServiceBridge	Status:'Unlocked' User:'ImageTrend Admin'

Changing the Run Form Template

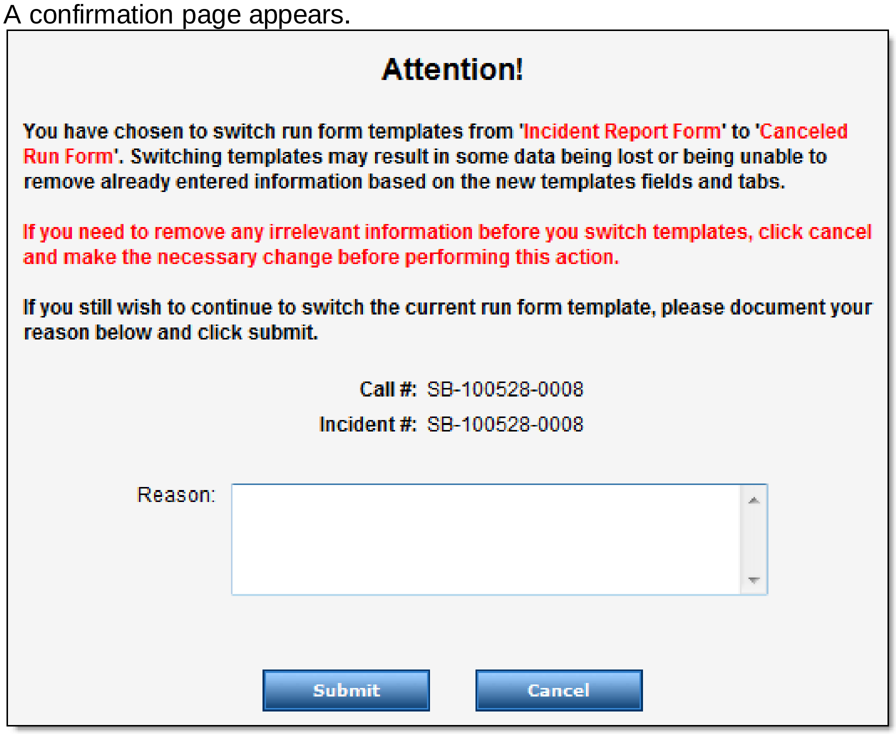
You can change the template of a run form directly from the *Run History* page in addition to from within the run form.

1. From the results of your run history search, locate the desired run.

2. Click the *Change Template* icon .
   The *Change Template* window appears.



3. From the *Standard Run Forms* drop down menu, select the new template.
4. Click *Select Standard Run Form.*
   A confirmation page appears.



5. In the *Reason* text box, type your reason for switching the template for this incident.
6. Click *Submit.*
   The template is switched and the run form opens.

6.8 Updating Multiple Runs

State Bridge allows you to perform several different actions on multiple runs at the same time either from the results of a run history search or from the *Incident List*. Your ability to perform each of these actions is based on your level of permissions.

Printing Multiple Runs

The Batch Print option allows you to generate a PDF file containing a report for multiple runs at the same time, rather than opening each PDF individually. This PDF file can then be easily printed based on your printer settings. This option will generate the same report for each selected run in the PDF file.

1. From the results of your run history search or the Incident List, select the checkbox(es) for all runs that you want to print.
2. From the *Choose Bulk Action* drop down menu, select *Batch Print.*
   Another drop down menu appears.
3. Select the PDF report that you want to generate.
4. Click *Go.*
   A new window or tab opens with a PDF file containing the selected report for all selected runs.
   NOTE: Depending on the setup of your system, you may be prompted to enter a reason for working with multiple runs. If a prompt appears, enter your reason and click *Submit.*

Updating the Status of Multiple Runs

Based on your permissions, you may be able to update the status of multiple runs at the same time from the list of runs available once you search run history.

1. From the results of your run history search or the Incident List, select the checkbox(es) for all runs that you want to update the status for.
2. From the *Choose Bulk Action* drop down menu, select *Update Status.*
   Another drop down menu appears.
3. From the second drop down menu, select the new status to apply to the selected run forms.
4. Click *Go.*
   A confirmation dialog box appears.
5. Click *OK.*
   The status of the selected runs is updated.
   NOTE: Depending on the setup of your system, you may be prompted to enter a reason for working with multiple runs. If a prompt appears, enter your reason and click *Submit.*

Locking and Unlocking Multiple Runs

You can update multiple runs to be either locked or unlocked from the results of a run history search.

1. From the results of your run history search or the Incident List, select the checkbox(es) for all runs that you want to lock or unlock.
2. From the *Choose Bulk Action* drop down menu, select *Lock Runs* or *Unlock Runs,* as appropriate.
3. Click *Go.*
   A confirmation dialog box appears.
4. Click *OK.*
   The selected runs are locked or unlocked, as appropriate.

NOTE: Depending on the setup of your system, you may be prompted to enter a reason for working with multiple runs. If a prompt appears, enter your reason and click *Submit.*

6.9 Accessing Pre-Created Service Reports

The State Bridge has several common reports easily available that all system users can request for more information about the collected data. These reports have defined the information that will appear in the report, but take the data from the run reports entered into the State Bridge by your service. Additional reports are available from the Report Writer*.* For more information about the Report Writer, please refer to the *Report Writer* chapter.

1. From the top left, click *My Service.*
2. Under the *Modules* page, select *Reports.*
   The *Service Reports* page appears.

3. From the *Service Reports* page, click the name of the desired report.
   If any additional information is needed to specify the data in the report, a new page will appear with empty fields.
4. To further specify the report data, use the provided fields to enter the correct criteria and click *Continue.*
   The new report appears.

CHAPTER 7

COMMUNICATING WITH THE STATE BRIDGE

7.1 Chapter Overview

The State Bridge provides several ways to communicate with both people within the service and the public. This chapter explains how to send and receive messages using the State Bridge inbox and how to send messages to ImageTrend about suggestions and ideas for the State Bridge.

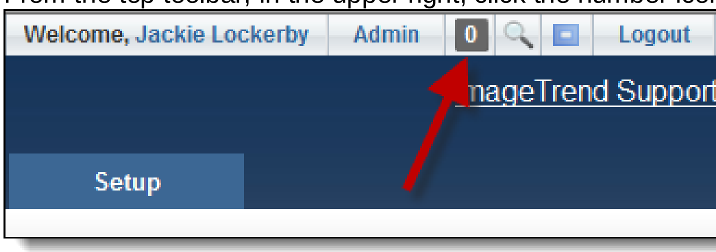
7.2 Working with the Inbox

The *Inbox* can be used in the same way as an email inbox, to send, receive or store messages from other system users.

Viewing Messages in the Inbox

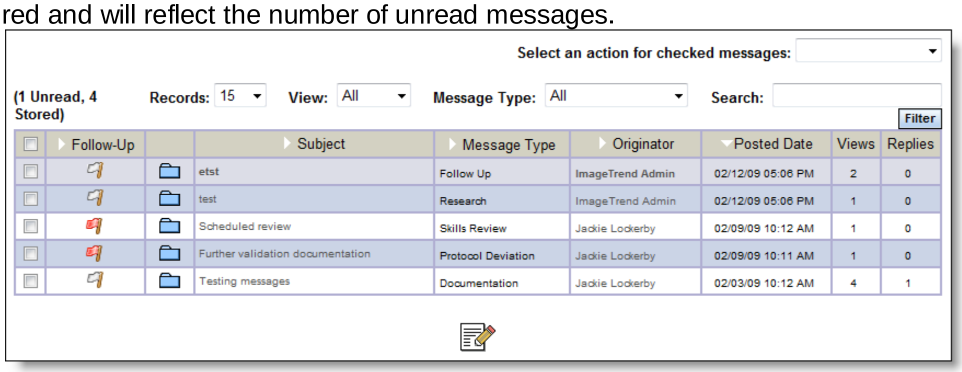
The inbox is how users obtain, respond and write messages pertaining to specific incidents or to communicate with other members of the service, medical direction or other system users. Message status is maintained within the system to verify when messages are sent, replied to and read. Messages can be stored in the inbox for later reference. When unread messages are present in the inbox, a notification will appear in the top right.

1. From the top toolbar, in the upper right, click the number icon.



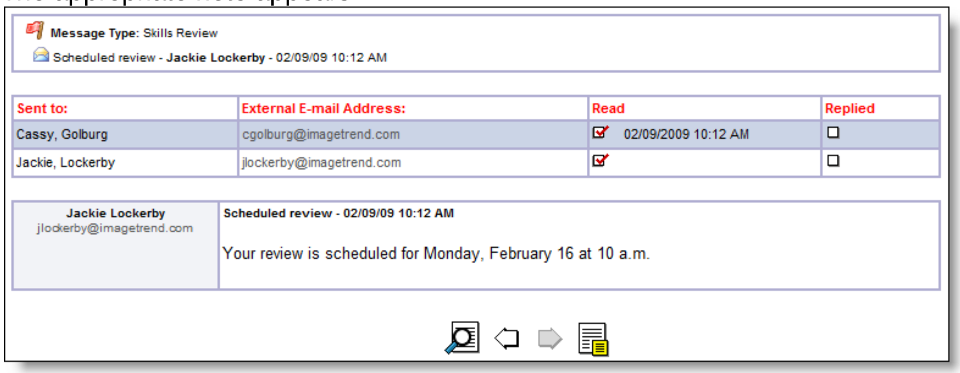
The *Inbox* page appears.

NOTE: If you have unread messages in your inbox, this number will be displayed in red and will reflect the number of unread messages.



2. To view read messages, unread messages or both, from the *View* drop down menu, select the desired type of messages to display in the inbox.
3. To view a different number of records per page, from the *Records* drop down list, select the desired number of records.
4. To go directly to a page of records, from the *Go to Page* section at the bottom left, click the desired page number.
5. To view a particular note, click the linked subject text or the corresponding folder icon .

The appropriate note appears.



6. To view a PDF file of the report to which this note pertains, from the *Associated Run Report Options* section, click *View PDF* (View PDF).
7. To view the online form of the report to which this note pertains, from the *Associated Run Report Options* section, click *View Run Form* (View Run Form).
8. To return to the list of messages, click *List of Message* .

Replying to Messages in the Inbox

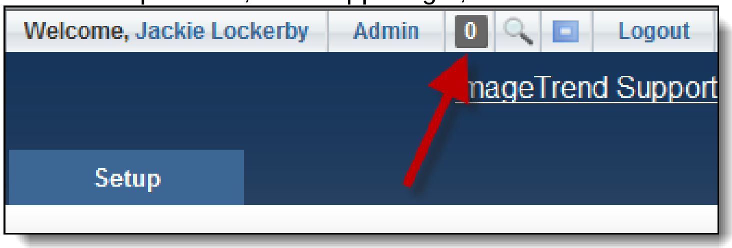
To share additional information with the sender of a note, users can use the inbox to reply to notes that they have received.

1. Open the note to which you want to reply.
   NOTE: For more information about viewing notes, please refer to the above *Viewing Notes in the Inbox* section.
2. From the bottom of the page, click *Reply This Message* .
3. In the *Message* text field, type all desired text for the note.
4. **OPTIONAL:** To send a copy of this note to additional people,
   a. **OPTIONAL:** To narrow down the list of people displayed in the *Service Staff* section, use the *Permission Groups* drop down menu or the checkbox(es) to specify criteria that users should meet in order to show up in the *Service Staff* section.
      HINT: This can make it easier for you to locate the people you want to receive this message. To view all people again, you can click the *Clear Filters* button.
   b. In the *Service Staff* section, select the names of all staff to receive the message.
      HINT: To select more than one person, press and hold *Ctrl* while clicking each name.
   c. Click the *Add* icon >.
   d. In the *Administrative Contacts* section, select the names of all system administrators to receive this message.
      HINT: To select more than one person, press and hold *Ctrl* while clicking each name.
   e. Click the *Add* icon >.
5. To send the note, click *Submit.*
   To clear all text in the note, click *Reset.*
   To return to the original note without saving any changes, click *<<Back.*

Sending New Messages

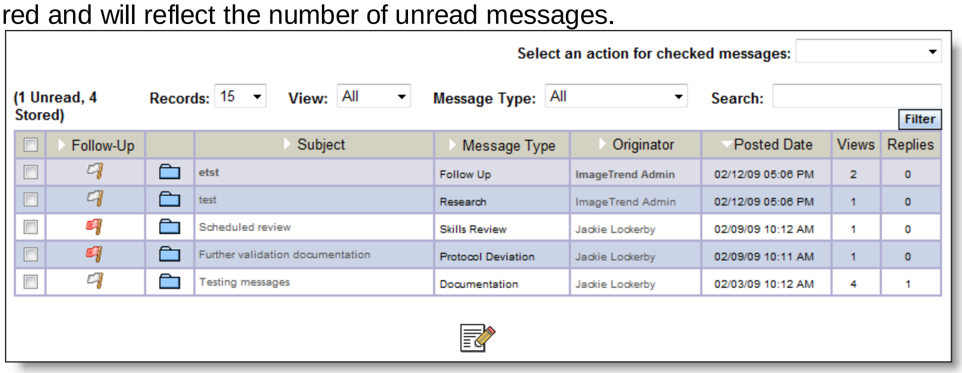
Users can send new notes to other system users.

1. From the top toolbar, in the upper right, click the number icon.

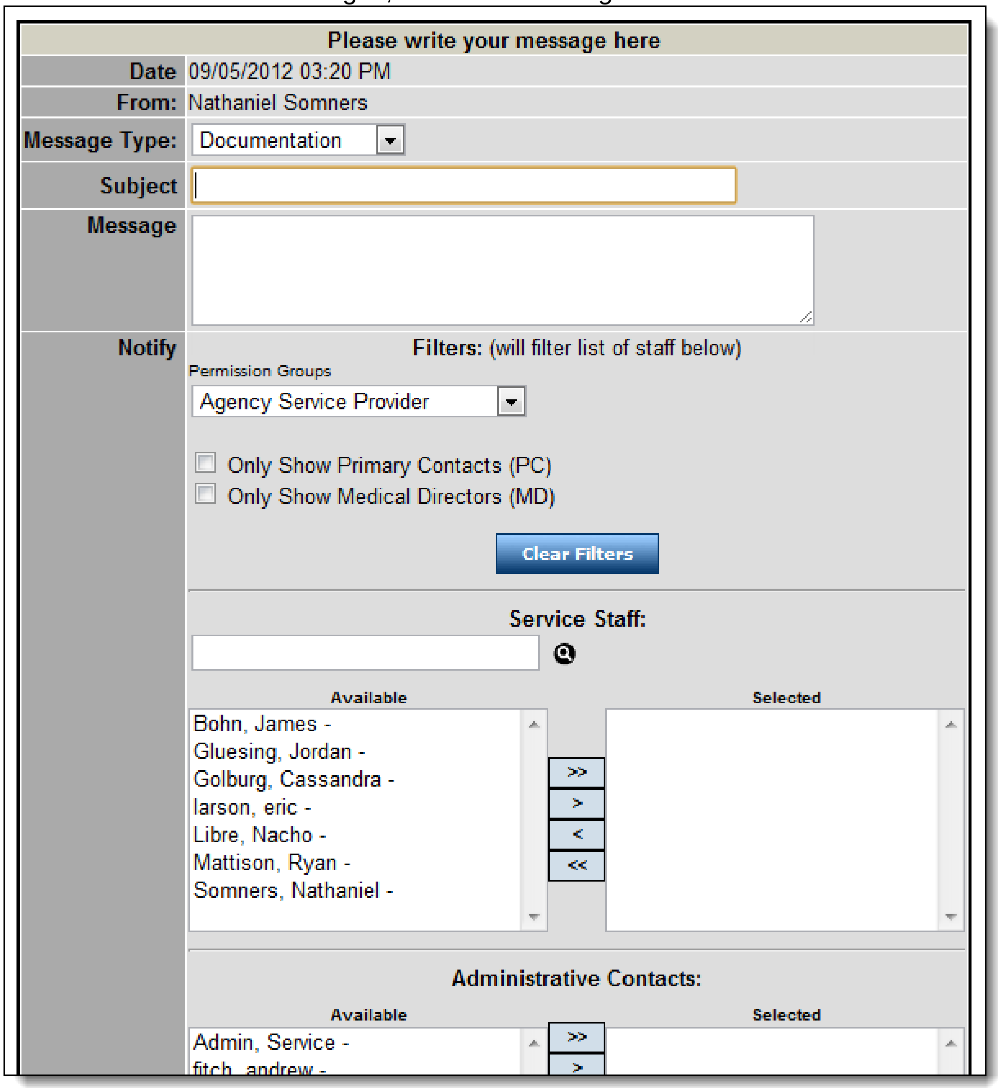
   

   The *Inbox* page appears.

   NOTE: If you have unread messages in your inbox, this number will be displayed in red and will reflect the number of unread messages.

2. From below the list of messages, click *New Message* .



3. From the *Message Type* drop down menu, select the desired category for this message.
4. In the *Subject* text box, type a title for the note.
5. In the *Message* text field, type the note.
6. To narrow down which people are displayed in the lists of potential recipients,
   a. From the *Permission Groups* drop down menu, select any permission group you want to filter names by.
   b. To show only primary contacts or medical directors, select the appropriate checkbox.
7. To add staff from your currently selected service to this message,
   a. From the *Available* scroll list for the *Service Staff* section, select the staff members
   b. Click the *Add* icon > .

      NOTE: Multiple staff members can be selected from this section by pressing and holding *Ctrl* while clicking each name.
8. To include an administrative contact for the system in this message,
   a. From the *Available* scroll list in the *Administrative Contacts* section, select the desired name.

b. Click the *Add* icon >.

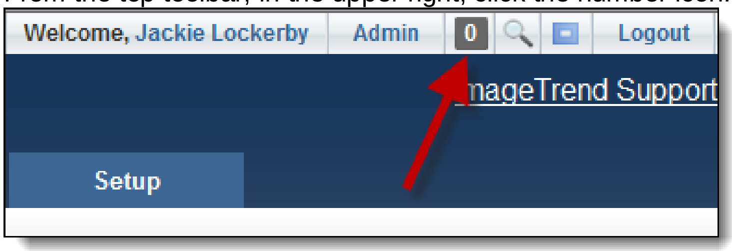
NOTE: Multiple names can be selected from this section by pressing and holding *Ctrl* while clicking each name.

9. To send emails with the message to all selected staff at the email address listed in their profile, select the *Send an email in addition to the Inbox, if available* checkbox.
10. When finished, to send the note, click *Submit.*
    To clear all text of the note, click *Reset.*
    To return to the list of received notes, click *<<Back.*

Flagging Messages for Follow Up

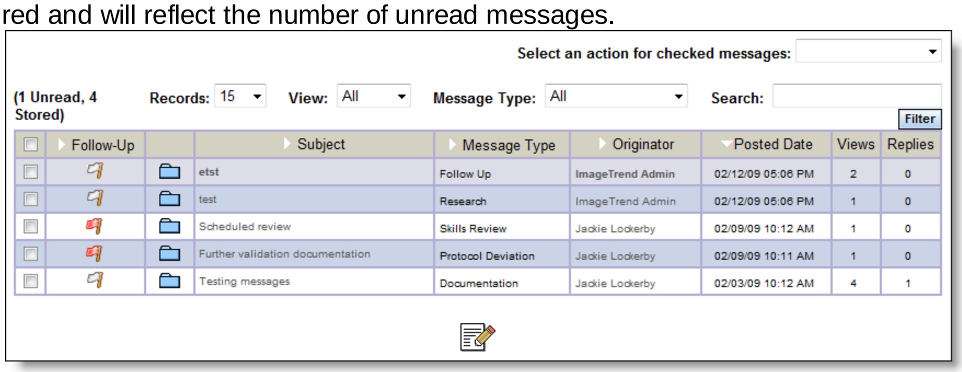
You can flag messages to remind yourself to follow up, if needed. Messages with white flags are not flagged for follow up; messages with red flags are.

1. From the top toolbar, in the upper right, click the number icon.



The *Inbox* page appears.

NOTE: If you have unread messages in your inbox, this number will be displayed in red and will reflect the number of unread messages.

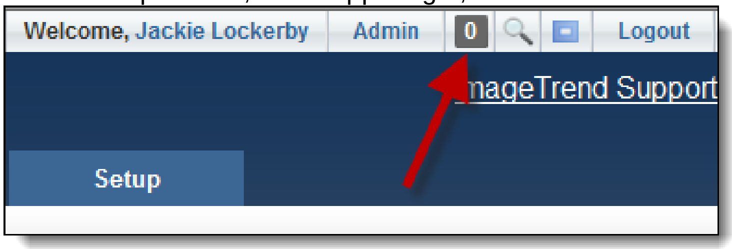


2. To flag a single message, in the *Follow-Up* column, click the *Flag* icon for the message you want to flag.
3. To flag multiple messages,
    a. Select the checkbox for each message to flag.
    b. From the *Select an action for checked messages* drop down menu, select *Flag for Follow Up.*
4. To clear a flag on a single message, in the *Follow-Up* column, click a red *Flag* icon for the message to be de-flagged.
5. To clear a flag on multiple messages,
    a. Select the checkbox for each message for which to clear the flag.
    b. From the *Select an action for checked messages* drop down menu, select *Clear Flag.*

Deleting Messages

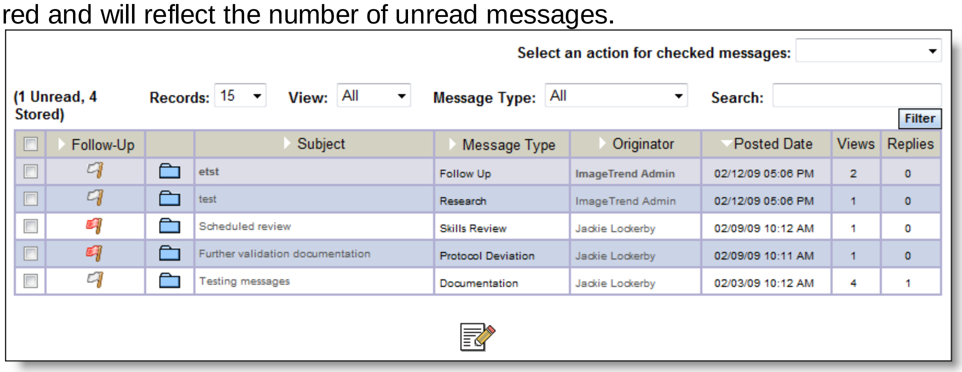
System users can delete messages that they no longer need from their inbox. You can delete single or multiple messages.

1. From the top toolbar, in the upper right, click the number icon.



The *Inbox* page appears.

NOTE: If you have unread messages in your inbox, this number will be displayed in red and will reflect the number of unread messages.



2. To delete a single message,
   a. For the appropriate message, click the *Delete* icon .
      A confirmation page appears.
   b. To delete the message, click *Yes.*
      To save the message, click *No.*
3. To delete multiple messages,
   a. For the desired messages, select the checkboxes.
   b. From the *Select an action for checked messages* drop down menu, select *Delete Checked.*

7.3 Submitting Feedback to ImageTrend

Based on your permissions, you may have access to User Voice, which will allow you to submit ideas to ImageTrend and vote on which existing suggestions you think are a good idea.

Guidelines

User Voice is an open user forum and we ask that you follow certain guidelines to help ImageTrend and others respond to your feedback, as well as to maintain a community of respect among other users of ImageTrend products.

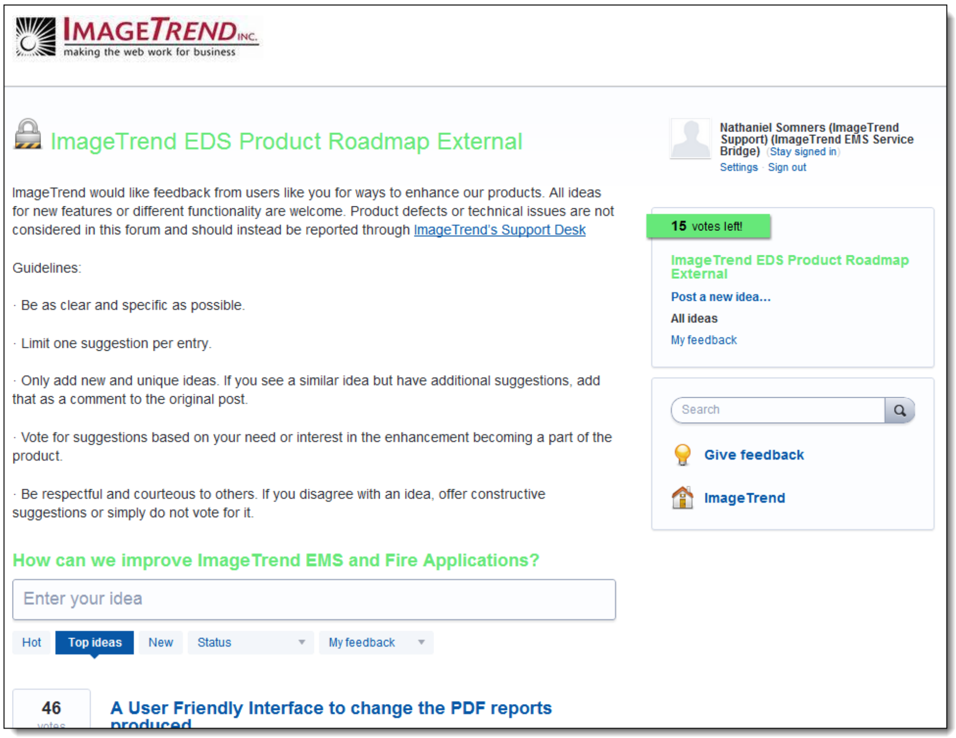
- Be as clear and specific as possible.
- Limit one suggestion per entry.
- Only add new and unique ideas. If you see a similar idea but have additional suggestions, add that as a comment to the original post.

- Vote for suggestions based on your need or interest in the enhancement becoming a part of the product.
- Be respectful and courteous to others. If you disagree with an idea, offer constructive suggestions or simply do not vote for it.

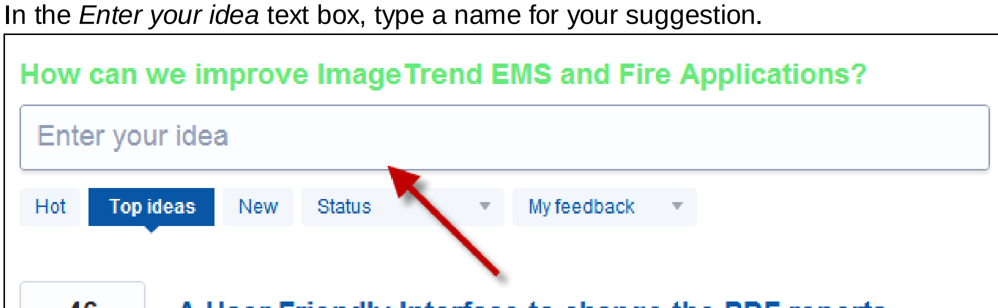
Submitting a New Idea

You can submit new ideas for ImageTrend products through User Voice.

1. From the top left, click *User Voice.*
   The *User Voice* page opens in a new tab or window.
   HINT: You may have to click the *More* link in order to see the *User Voice* link.



2. In the *Enter your idea* text box, type a name for your suggestion.



As you type, if any existing ideas use similar words to those you are typing, they appear below the text box.

NOTE: If no suggested ideas come up, skip to step 4.

3. If any of these suggested ideas are the same as the idea you were going to enter, vote for them or add comments as needed with additional information.
   HINT: For more information about voting or adding comments, please refer to the *Voting for an Idea* or *Commenting on an Idea* sections in this manual.
   OR
   To add a new idea, click *Post a new idea…*
   Additional fields appear to allow you to enter your idea.

4. **OPTIONAL:** To assign this idea to a category, from the *Category* drop down menu, select the desired category.
   NOTE: You do not need to assign a category, but it can make it easier for other users to find your idea.
5. In the *Describe your idea…* text box, type any additional detail you want to include about your idea.
6. **OPTIONAL:** To attach a file related to your idea,
   a. In the *Describe your idea…* text box, click *Attach a File.*
   b. Click *Choose File.*
      The *Choose File* dialog box appears.
   c. Navigate to and select the desired file.

d. Click *Open.*
The file is selected for attaching to your idea.

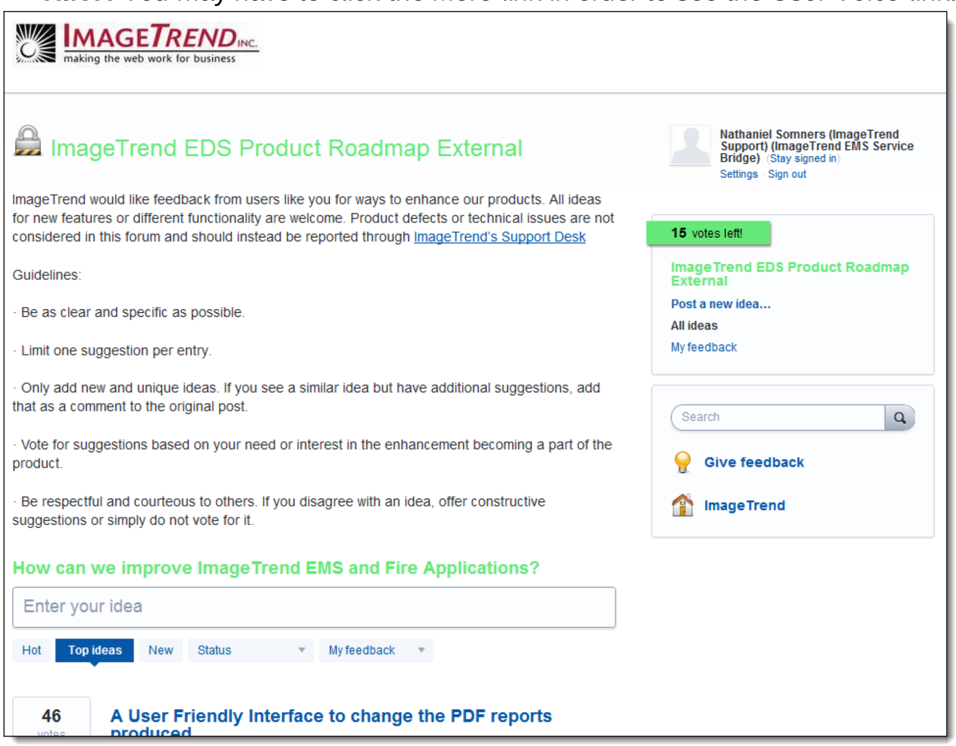
7. Click the number of votes you want to give for this idea.
   NOTE: You must vote for your own idea at least once.
8. When finished entering your idea, click *Post Idea.*.
   The idea is entered onto the User Voice forum.

Voting for an Idea

If you see an idea in the User Voice forum that you like, you can vote for that idea up to 3 times. Voting for an idea lets ImageTrend see how many people are interested in having a specific idea or feature developed. While this does not guarantee that a specific feature will be developed at any specific time, it does provide a way for you to easily give feedback on your State Bridge and its features.

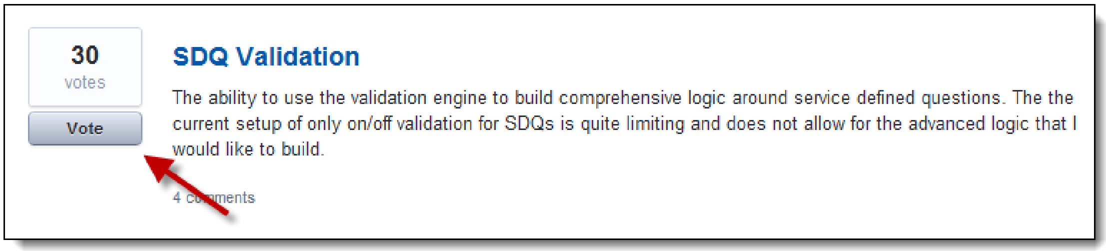
Keep in mind that you have a total of 15 votes to use. If an idea is developed and so is removed from the forum, you will get your votes back. In addition, you can always remove votes from an idea if you run out of votes and would prefer to vote for a different idea.

1. From the top left, click *User Voice.*
   The *User Voice* page opens in a new tab or window.
   HINT: You may have to click the *More* link in order to see the *User Voice* link.

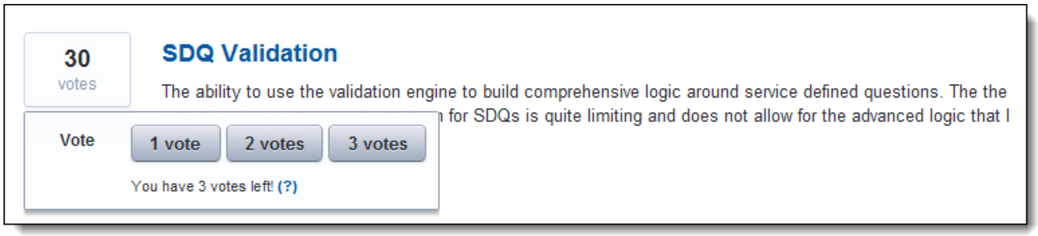


2. Find the idea that you want to vote for.

3. On the left side, below the number of votes, click *Vote.*



A pop up appears with buttons to vote.



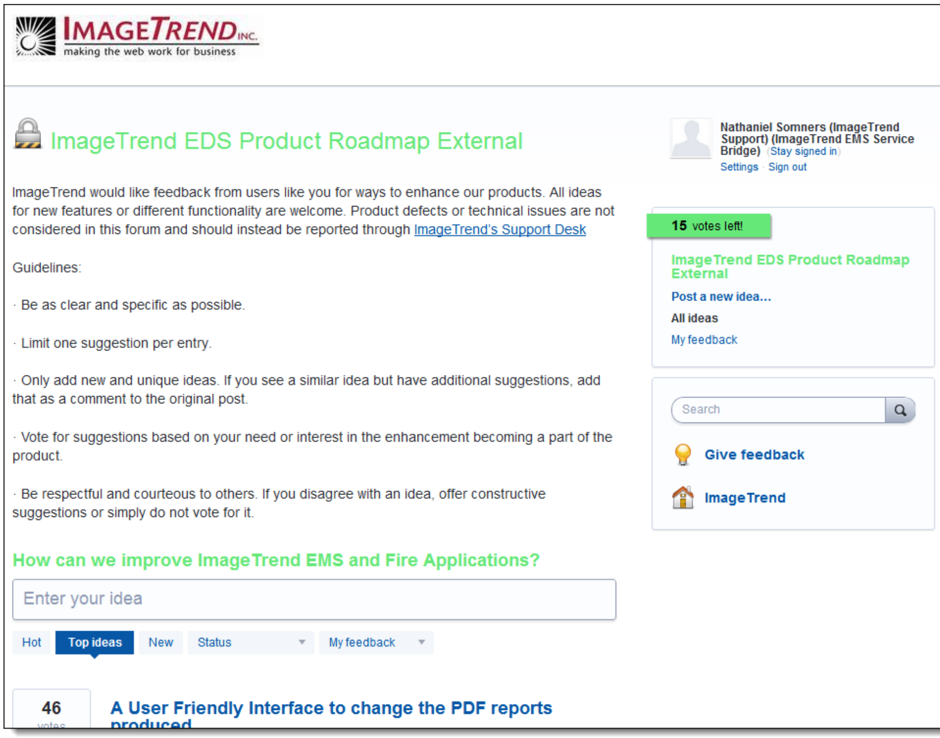
4. Click the number of votes you want to give to this idea.
   Your votes are recorded.
5. To close the pop up, click anywhere on the page outside of it.

Removing Votes for an Idea

You can remove votes for an idea that you have votes for at any time. This may happen most often if you've already used all your votes but want to vote for a new idea. You can either remove all your votes for a particular idea or just use fewer votes.

1. From the top left, click *User Voice.*
   The *User Voice* page opens in a new tab or window.

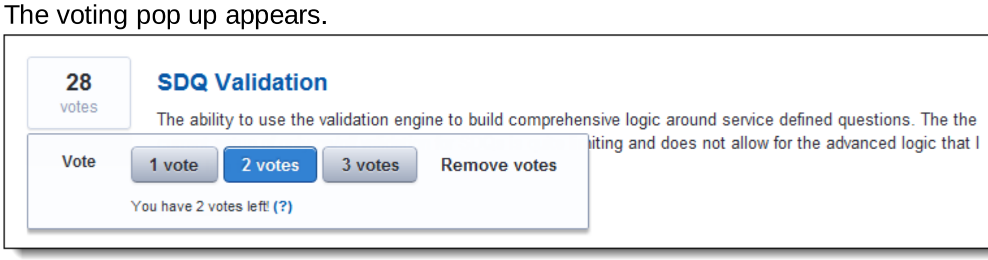
HINT: You may have to click the *More* link in order to see the *User Voice* link.



2. Locate the idea you want to remove votes from.
3. Click the *Votes* button.

HINT: Any idea you have votes for will display the number of times you voted for it on the *Vote* button.

The voting pop up appears.

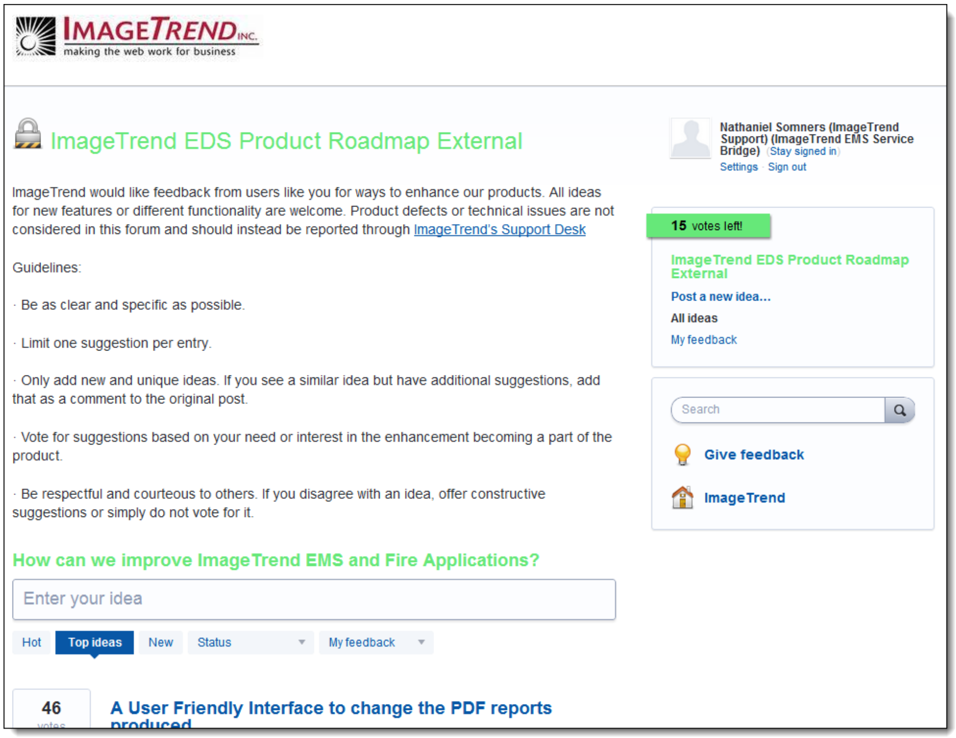


4. To enter a different number of votes, click the appropriate number of votes.
OR
To remove all your votes for this idea, click the *Remove Votes* link on the right side of the pop up.
Your votes are adjusted.
5. To close the pop up, click anywhere on the page outside of it.

Commenting on an Idea

At times, you may want to add a comment to an idea. This might be to expand on another person's idea that you agree with, ask a question or give an example of how your agency might use this feature. You can add comments on to any existing idea.

1. From the top left, click *User Voice.*
   The *User Voice* page opens in a new tab or window.
   HINT: You may have to click the *More* link in order to see the *User Voice* link.



2. Find the idea that you want to add a comment for.

3. Click the name of the idea or the associated *Comments* link.
   The idea opens.

4. In the *Add a comment…* text box at the bottom of the page, type your comment.
5. Click *Post comment.*
   The comment is added to the idea and will be visible to everyone looking at this idea in User Voice.

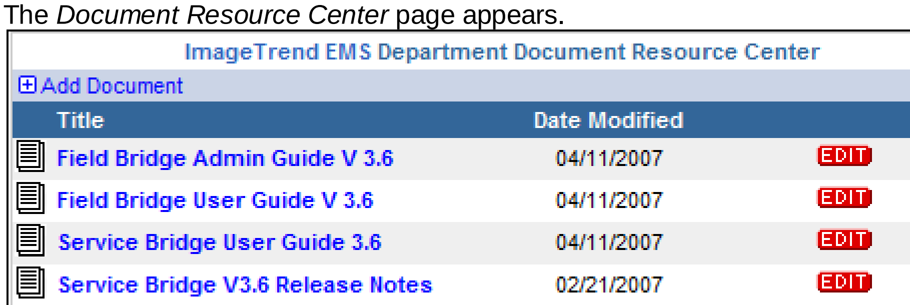
7.4 Working with Documents

Documents in the State Bridge allow you to set up links to files and URLs that can then be accessed by anyone logged into the State Bridge who can view the *Documents* section. You can choose to upload a document or link to any URL.

Viewing Documents

The State Bridge can contain documents and website links to be accessed and used as resources.

1. From the top left, click *My Service.*
2. Under the *Modules* tab, click *Documents.*
   The *Document Resource Center* page appears.


ImageTrend EMS Department Document Resource Center

⊞ Add Document

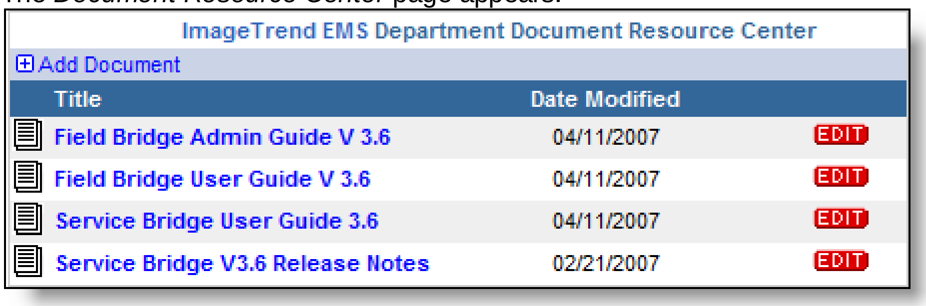
Title	Date Modified	
Field Bridge Admin Guide V 3.6	04/11/2007	EDIT
Field Bridge User Guide V 3.6	04/11/2007	EDIT
Service Bridge User Guide 3.6	04/11/2007	EDIT
Service Bridge V3.6 Release Notes	02/21/2007	EDIT

3. To view a particular resource, from the list of documents, click the name of the desired document.

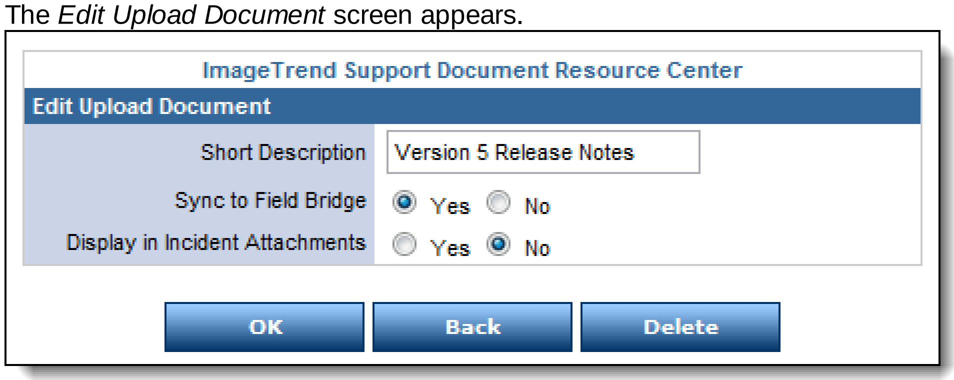
Editing Document Information

Administrators can change the title of a document and the information that appears when a system user rests his or her mouse above the title without clicking.

1. From the top left, click *My Service.*
2. Under the *Modules* tab, click *Documents.*
   The *Document Resource Center* page appears.



3. From the list of documents, click the correct *Edit* button.
   The *Edit Upload Document* screen appears.



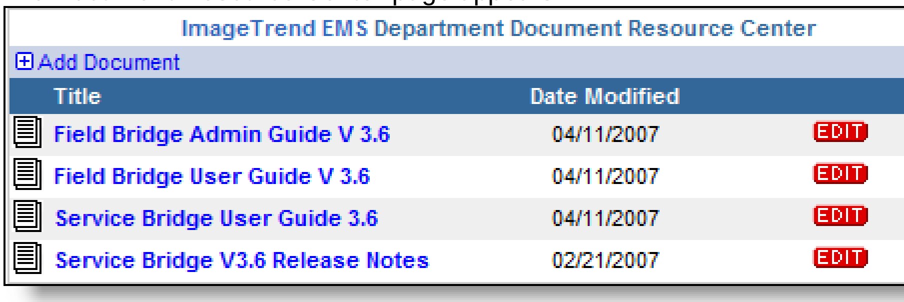
4. To change the title, in the *Short Description* text box, type the new title.
5. To sync this document to the *Documents* section in Field Bridge, in the *Sync to Field Bridge* section, select *Yes.*
6. To set this document up to display for easy selection in the *Attachments* window of a run form, in the *Display in Incident Attachments* section, select *Yes.*
7. To save the information, click *OK.*
   To return to the list of documents without saving the changes, click *Back.*

Adding New Documents

Administrators can upload new documents to the State Bridge system for other system users to access. Documents in this section can include protocols, reference guides or reports that all system users should be able to access.

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

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

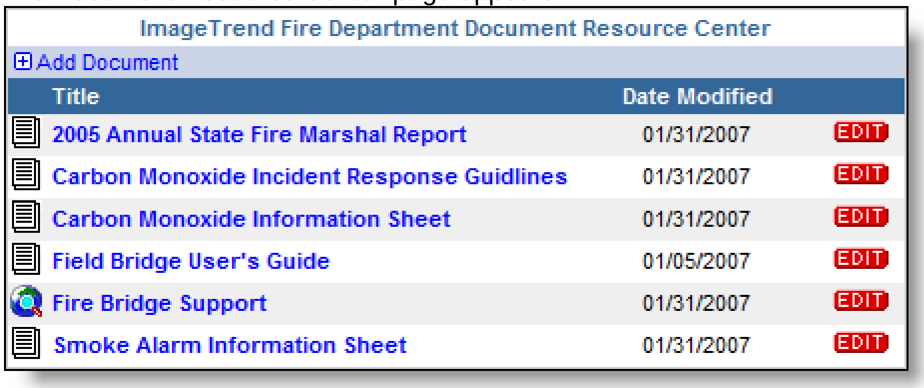
3. From the *(Service Name) Document Resource Center* table, click *Add Document.*
4. In the *Choose Document Type* table, select the type of document you will be created.
   NOTE: *Type-In* provides a text editor for administrators to type the document information into. *Upload* allows administrators to place a copy of a document (such as a Word or Excel file) in the system. *URL* provides a link that users can click to open a Web page.
5. Click *Submit.*
6. For a type-in document,
   a. In the *Short Description* text box, type the name of the document.
   b. Click *OK.*
      A text box appears.
   c. Type your information into the text box.
   d. When finished, click *Save.*
      The type-in document is saved.
7. For uploaded documents,
   a. In the *Short Description* text box, type the name of the document.
   b. In the *Path* section, click *Choose File.*
      The *Choose File* dialog box appears.
   c. Navigate to and select the file to upload.
   d. Click *Open*.
      The file is selected and the *Choose File* dialog box closes.
   e. To sync this document to the *Documents* section in Field Bridge, in the *Sync to Field Bridge* section, select *Yes.*
   f. 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.*
   g. Click *OK.*
      The document is uploaded.
8. For URLs,
   a. In the *Short Description* text box, type the name of the link as it should appear on the *Documents* page.
   b. In the *URL of website* text box, type or paste the URL.
   c. Click *OK.*
      The URL is added to the document list.

Deleting Documents

Administrators with the correct permissions can remove documents from the document list.

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

2. Under the *Modules* tab, click *Documents.*
   The *Document Resource Center* page appears.



3. From the list of documents, click the correct *Edit* button.
   The *Edit Upload Document* screen appears.
4. Click *Delete.*
   The document is deleted.

CHAPTER 8

WORKING WITH THE QA/QI MODULE

8.1 Chapter Overview

This chapter provides an overview of the QA/QI module, including details about setting up Service Bridge to use the module and about performing QA/QI review within Service Bridge.

8.2 Overview of the QA/QI Module

The QA/QI module allows administrators to create random batches of incidents and assign them for QA/QI review.

When you begin using the QA/QI module, you will need to perform some initial setup. Before you can easily use the QA/QI module, you will want to:

- Create **QA/QI groups** for easily assigning teams of reviewers,
- Flag **staff members** who can be assigned incidents to review,
- Create **QA/QI incident templates** that show the information that is important for review, and
- Create **views** to control what information you see when you are creating batches.

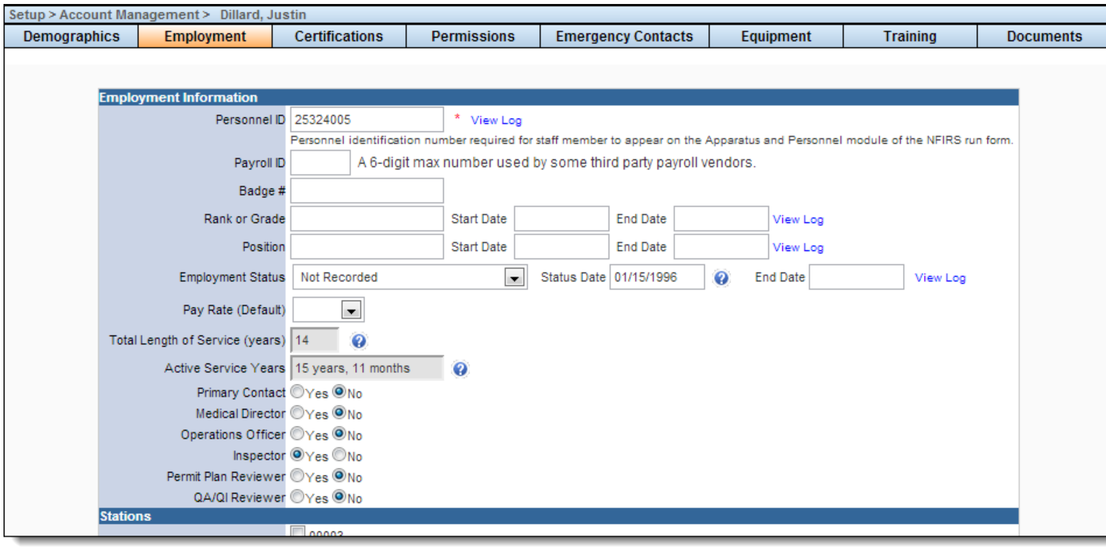
After you have completed setup, you will assign incidents to individuals by creating a **batch**, which will assign certain individuals to review certain incidents. Reviewers will then be able to complete their review from a queue of incidents assigned to them, and you will be able to monitor the status of each scheduled review and incident.

8.3 Flagging QA/QI Team Members

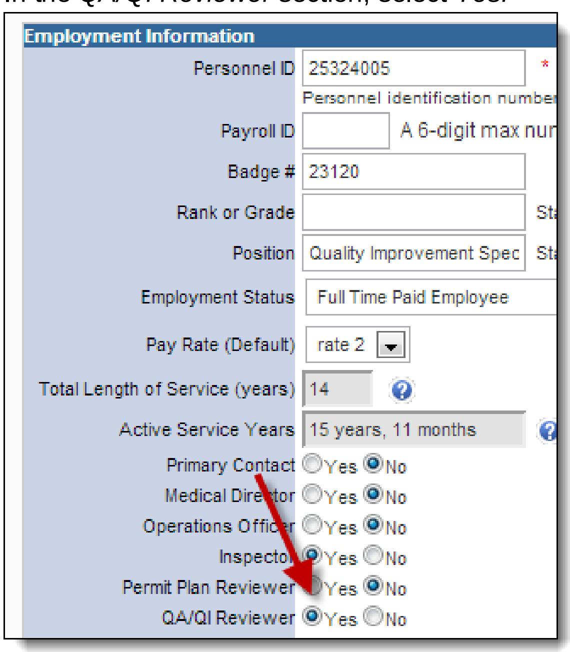
Before you can assign a staff member to review an incident in the QA/QI module, that staff member must be flagged as a QA/QI reviewer.

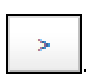
1. If necessary, from the upper left, click *My Service.*
   The *Home* page for your last selected agency appears.
2. Select the *Staff* tab.
   A list of service staff appears.
3. Click the desired staff member's name.
4. Click *Edit.*
   The *Demographics* tab of the staff profile appears.

5. Click the *Employment* tab of the staff profile.
   The *Employment* tab appears.



6. In the *QA/QI Reviewer* section, select *Yes.*



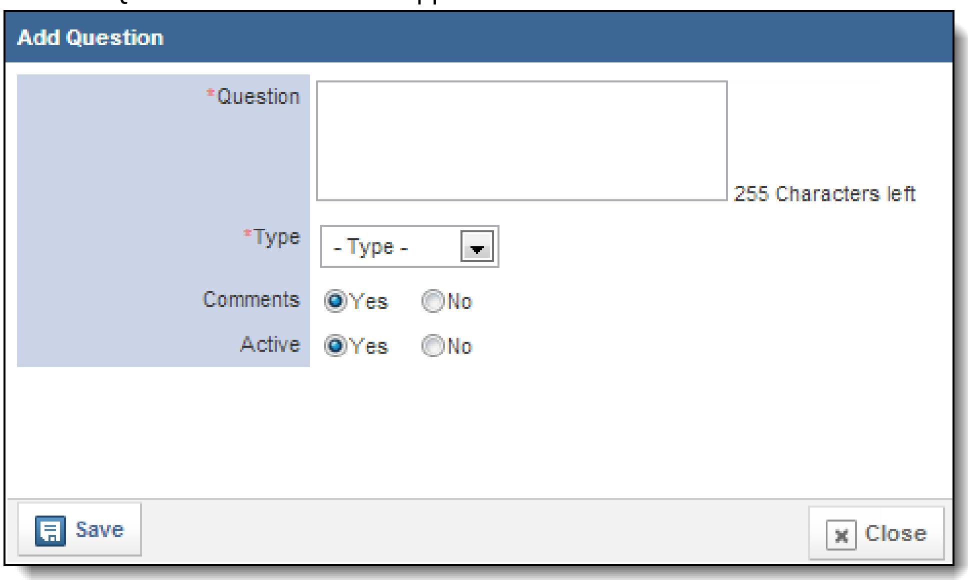
   The *QA/QI Groups* section appears.
7. From the *Available* scroll list, select any group(s) to assign this person to.
   HINT: To select multiple options, press and hold the *Ctrl* key while clicking each desired option.
8. Click the *Add* icon .
9. Repeat steps 7–8 until the staff member is added to all desired QA/QI groups.
10. Click *OK.*
    The changes to the staff member's profile are saved and he or she is set up as a QA/QI reviewer.

8.4 Creating QA/QI Questions

These are the questions that reviewers will be answering as they review each incident. These questions can be set up either at the service or the system level, based on the system permissions.

Service level QA/QI questions can only be used for your service's templates. This option may not be available to you based on system-level security settings. If this option is not available, you will see a message on the *QA/QI Questions* page indicating this.

1. If necessary, from the upper left, click *My Service.*
   The *Home* page for your last selected agency appears.
2. Select the *Setup* tab.
   The *Setup* tab appears.
3. Under *Service Settings and Resources* > *Service,* click *QA/QI Questions.*
   A list of existing QA/QI questions appears.
4. Click *Add QA/QI Question.*
   The *Add Question* modal window appears.



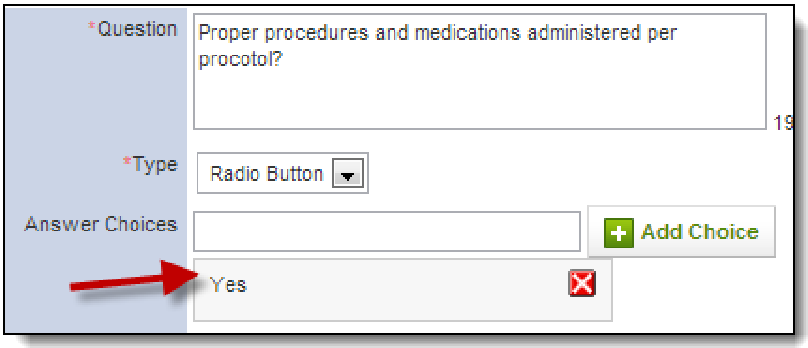
5. In the *Question* text box, type the question.
6. From the *Type* drop down menu, select the type of field reviewers will use to answer this question.
   For radio buttons, the *Answer Choices* field appears.

   Radio Button
   Radio buttons will provide a list of choices and the reviewer will be able to select one to answer the question.

   Textbox
   Text boxes will provide a space where the reviewer can type an answer.

7. If applicable, to set up answers for a radio button question,
   a. In the *Answer Choices* text box, type the first answer.

   b. Click *Add Choice.*
      The first answer is added.



   c. Repeat steps a–b until all desired answer choices are applied.
8. In the *Comments* section, select whether reviewers should be able to add additional comments when answering this question on a form.
9. In the *Active* section, select whether this question should currently be active and available to add to templates, or inactive and saved for reference.
10. When finished, click *Save.*
    The question is added.

8.5 Overview of QA/QI Templates

There are two types of QA/QI templates: **QA/QI form templates** and **QA/QI report templates**. Similar to run form templates and PDF report templates, the QA/QI form templates can be filled out by reviewers and the QA/QI report templates are PDF reports that can be generated and printed from QA/QI forms.

A QA/QI form template allows you to create a form that displays both the question that needs to be answered (e.g., *Was the correct date of service entered*) and the field that the data is contained within (e.g., the *Incident Date* field). When reviewers use this template, they will see the question as a field that they can fill out, and the associated field from the incident form will display the information that is recorded for the incident they are working with.

If you have previously worked in the Layout Editor to create run form or PDF templates, you will find that creating a QA/QI template is very similar and uses many of the same steps. In order to create a QA/QI template, you will need access to the Layout Editor in either the *Setup* section for a service or the *Admin* section for system administrators.

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.

For more details about working with templates in the Layout Editor, please refer to the Working with the Layout Editor chapter.

Creating a QA/QI Template: Process Overview

More details about each step are available throughout this guide.

1. Create QA/QI questions to be included in the template.
   NOTE: If you are a service administrator, these may already be set up for you by the system administrator.

2. To create a QA/QI form template, create a template in the Layout Editor with a type of *QA/QI.*
   OR
   To create a QA/QI report template, create a template in the PDF Layout Editor with a type of *PDF QA/QI Report.*
   NOTES:
   You can either create a brand new template or copy an existing one.
   As always when working with templates, it is a good idea to mark the new template as inactive until it is done, so no one tries to work with it accidentally.
3. As needed, add, update and remove tabs and panels until you have the desired number of pages and sections for your template.
   NOTE: For forms, we recommend setting all panels to have a two column layout; one column for the QA/QI question and one column for the associated run form field that needs to be reviewed.
4. Add the appropriate QA/QI question controls to the form.
   HINT: All QA/QI questions will have a control type of *Service QA/QI Questions* or *System QA/QI Questions,* depending on whether they were set up at the service or the system level.
5. Add the appropriate run form controls to the form.
   NOTE: All run form controls will be read-only on QA/QI forms. These can be added at the same time as the QA/QI question controls, allowing reviewers to see the appropriate incident information next to the review questions.

8.6 Creating Views for QA/QI Batches

Batch views allow you to create a set of criteria that incidents must meet in order to be displayed when that view is applied to a batch, and also to customize which columns you see. You can create and save your own custom views that you can apply at any time when you're working with the QA/QI batches.

There are four different types of batch views: system views, service views, my views and the default view. Your ability to create and edit views is based on permissions. Users will only be able to create and edit batch views if they have the correct level of access, and may be able to view only certain types of views based on their permissions.

System views are visible to everyone, although only system administrators will be able to edit them.

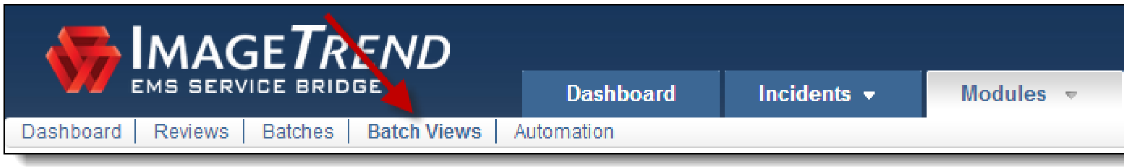
Service views are set up for a specific service by service administrators. Only service administrators will be able to edit these views, although anyone in that service can view them.

My views are created by you and can be edited by you at any time. Only you will be able to use and edit your views.

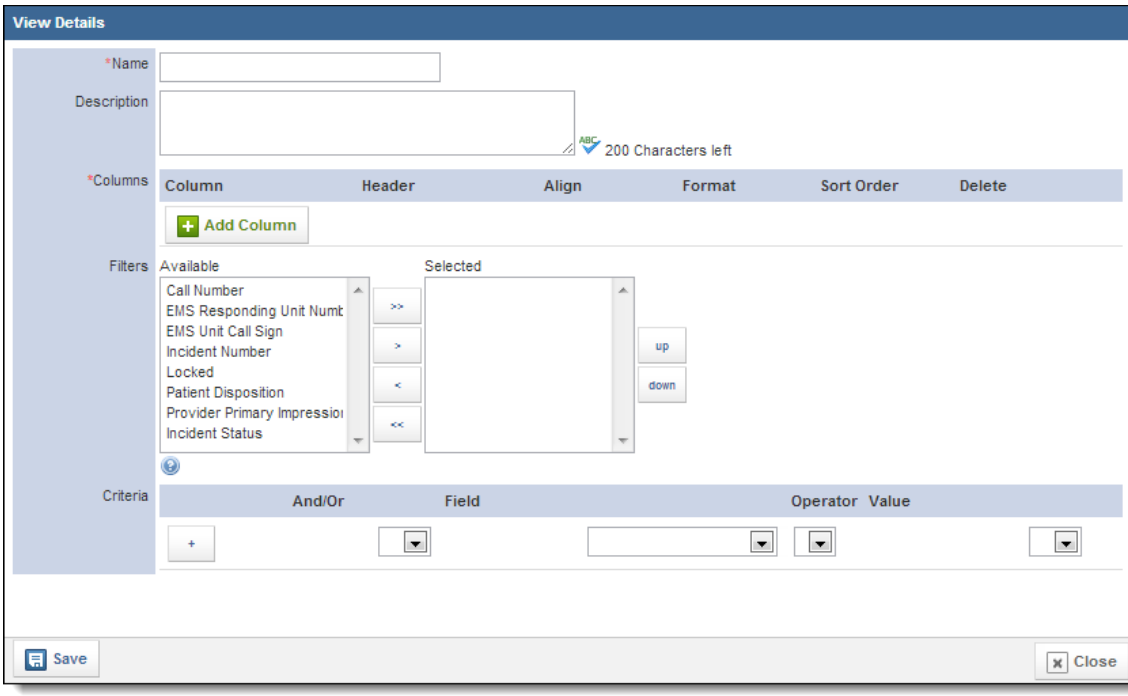
The **default** view is a basic view for batches that will be available as soon as you start using the QA/QI module, whether or not any custom views are set up for your system or service. You will not be able to edit this view, although you can use it to view or create batches at any time.

1. If necessary, in the upper left, click *My Service.*
   The home page for your agency appears.
2. Under the *Modules* tab, select *QA/QI.*
   The *Dashboard* page for the QA/QI module appears.

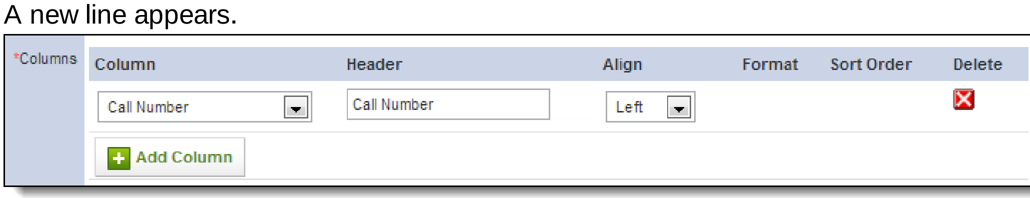
3. Select the *Batch Views* link.



4. Click *Add Batch View.*
   The *View Details* modal window appears.



5. In the *Name* text box, type the name for this view.
   NOTE: This name is what you will see and select from the *View* drop down menu when you want to use this view in a batch.
6. In the *Description* text box, type any additional descriptive details you want to save with this view.
   NOTE: This description will only be visible if someone opens this view for editing.
7. To set up an additional column of information to display on the list of incidents for batches where this view is used,
   a. Click *Add Column.*
      A new line appears.



   b. From the *Column* drop down menu, select the field that you want to appear for this column.
   c. **OPTIONAL:** To change the text that will appear in the column header, in the *Header* text box, type the desired header.
   d. From the *Align* drop down menu, select the way you want the text in this column aligned.

e. If you want to change the formatting for the way the information appears, from the *Format* drop down menu, select the desired formatting.

HINT: This option will not be available for all columns. It will most commonly be used for dates; you could choose to display the date as 3/21/2013 or March 21, 2013.

f. If you have multiple columns, to move this one up or down in the order of where it will appear on the page, click the *Up* or *Down* button, as needed.

HINT: If you drag the column to a new position, make sure that you do not click within a field; clicking within a field will open that field for editing rather than selecting the field to move.

OR

Click within the row for a column and drag it to the desired position in the list.

8. To add additional filters to the page that you can use for advanced searches,
   a. In the *Filters* section, from the *Available* scroll list, select the first filter to add.
   b. Click the *Add* icon .
   c. Repeat steps a–b until all desired filters are added.
9. To set up criteria that will narrow down the incidents listed on the page, in the *Criteria* section,
   a. To group multiple pieces of criteria, from the first drop down menu, select the opening parenthesis.

HINTS:

You generally only need to use parentheses if you will be creating multiple criteria where some are linked together with *And* (e.g., criteria A AND criteria B must be met) and others are linked together with *Or* (e.g., criteria C OR criteria D must be met).

It may be easier for you to add parentheses at the end, once you have set up all your criteria already.

If you want to enter multiple criteria, think of them like a math equation. Criteria will be applied in order unless parentheses are applied to group some of them together.

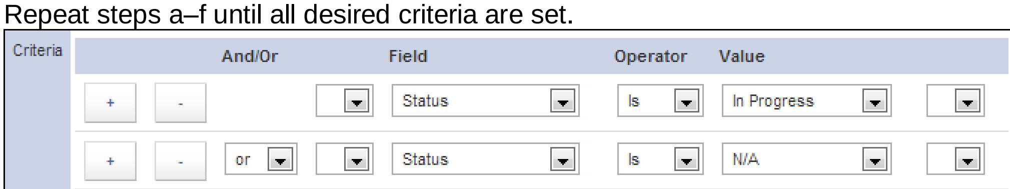
   b. From the *Field* drop down menu, select which field the criteria will be examining (e.g., *Status*).
   c. From the *Operator* drop down menu, select what is required of the selected value for the criteria to be met (e.g., *is, is before, begins with*).
   d. From the *Value* drop down menu, select the option that the field should be compared against (e.g., *In Progress*).

The first criteria is complete.

   e. To add an additional piece of criteria, click the *Add* icon .
   f. To determine how this piece of criteria relates to the others, from the *And/Or* drop down menu, select *And* (i.e., this all pieces of criteria must be met for a record to display) or *Or* (i.e., one of the pieces of criteria must be met for a record to display).

NOTE: If using parenthesis to group criteria, note that the *And* and *Or* options will only be applied within the parentheses. If the option is applied to a single piece of criteria outside a group, it will act upon the individual piece of criteria and the group as a whole.

   g. Repeat steps a–f until all desired criteria are set.



h. When finished with a group, from the last drop down menu, select the closed parenthesis.

10. When finished with all criteria, click *Save.*
    The *Create View For* window appears.
11. From the drop down menu, select the type of view you are creating.
    NOTE: Depending on your permissions, you may not be able to create all these types of views.

    My View
    A view that is saved as a My View will be available only for you. You can use this kind of view to view the incident and you will be able to edit it at any time, but no one else will be able to access it.

    Service Views
    Service views are available for the service the view is created in and can only be created or edited by individuals with service administrator-level permissions. All other users will be able to apply service views when looking at the incident list for that service but will not be able to make any changes.

    System Views
    System views are available for all services in the system and can only be created or edited by individuals with system administrator-level permissions. All other users will be able to apply system views when looking at the incident list but will not be able to make any changes.

12. Click *Save.*
    The new view is created.

8.7 QA/QI Process Overview

After you have completed setup, you will assign incidents to individuals by creating a **batch**, which will assign certain individuals to review certain incidents based on their group.

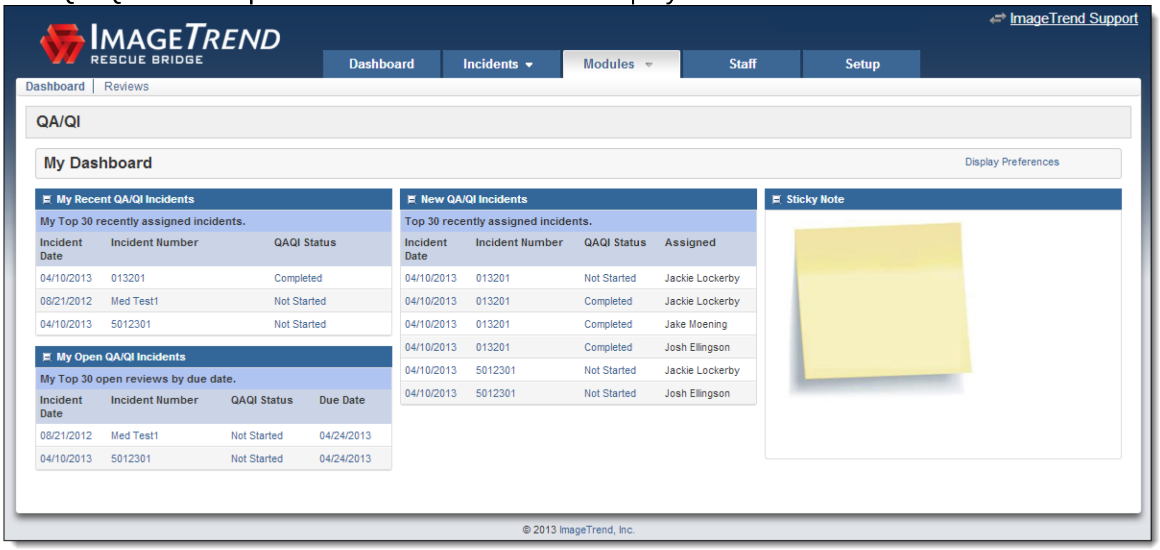
Reviewers will then be able to complete their review from a queue of incidents assigned to them, and you will be able to monitor the status of each scheduled review and incident.

8.8 Configuring your Dashboard

The Dashboard is the page you will see when you first open the QA/QI module. It gives you a snapshot of some of important information in your system. You can add “widgets” to the page to give you quick access to the information you want to see and access most often.

The Dashboard can be configured differently for every user so that each person can see the information that is most important to him or her.

1. Under the *Modules* tab, click *QA/QI*
   The QA/QI module opens with the *Dashboard* tab displayed.



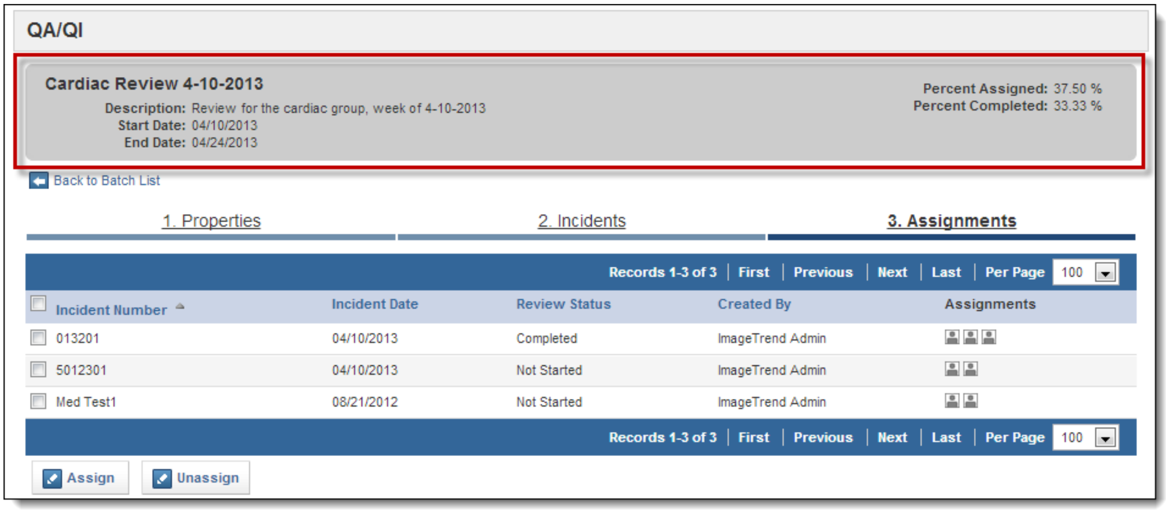
2. To view a list of all widgets that can be displayed, from the right side, click *Display Preferences*.
3. From the list that appears, to display a particular widget, select the corresponding checkbox.
4. To hide a widget that is currently displayed, deselect the corresponding checkbox.
5. When you are satisfied with the selected widgets to display on the Dashboard, click *Save.*
6. When finished, to hide the list, click *Display Preferences* again.
7. To move widgets, hover the mouse directly above the widget's title until it becomes a four-sided arrow .
8. Click and drag the widget to its new place on the page; all other widgets will automatically move to accommodate the new layout.

8.9 Overview of Batches

A batch is a collection of incidents that have been assigned to people for review within a certain period of time. Each batch record contains a variety of information about the batch and the incidents to be reviewed.

The header of the batch includes:

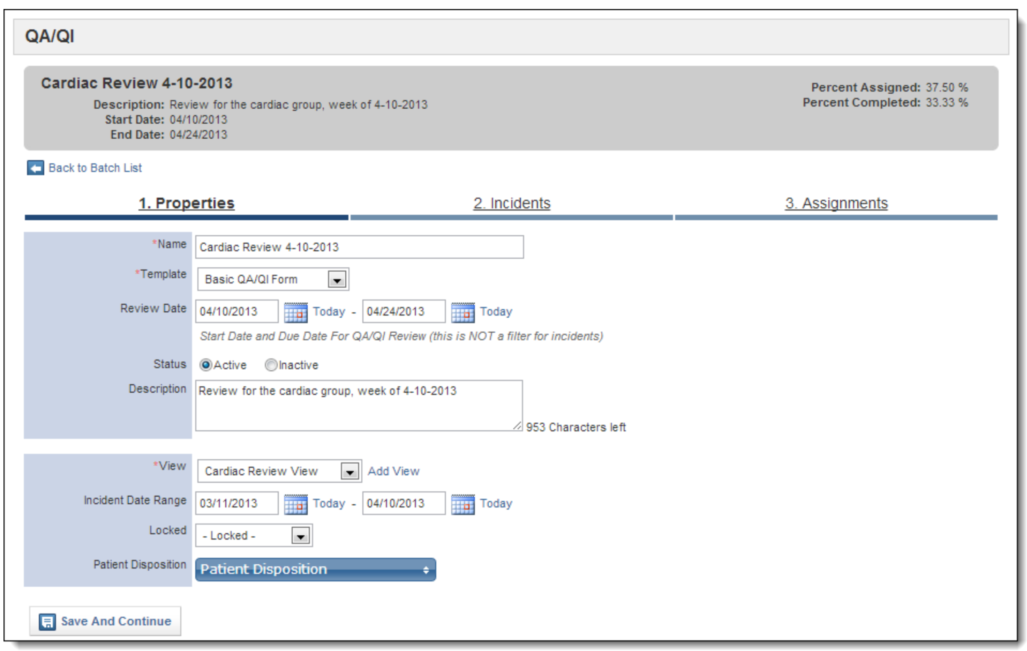
- The name and description that were set up when the batch was created
- The dates between which the review should take place
- The percentage of incidents meeting the criteria for the batch that have been assigned to reviewers
- The percentage of assigned incidents for which the QA/QI status is set to *Complete* for this batch.



Each batch has three tabs, each of which contains different information.

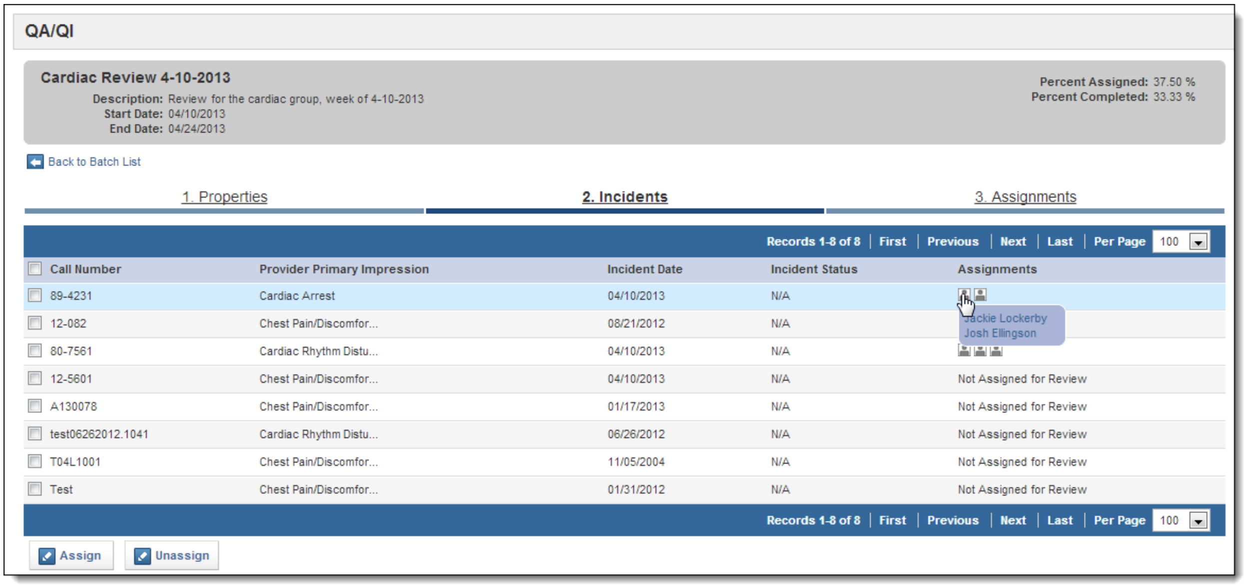
The **Properties** tab contains the settings of the batch including:

- The name and description,
- The QA/QI template used for review,
- The dates that incidents should be reviewed for the batch, and
- Criteria for finding incidents to be reviewed in the batch.



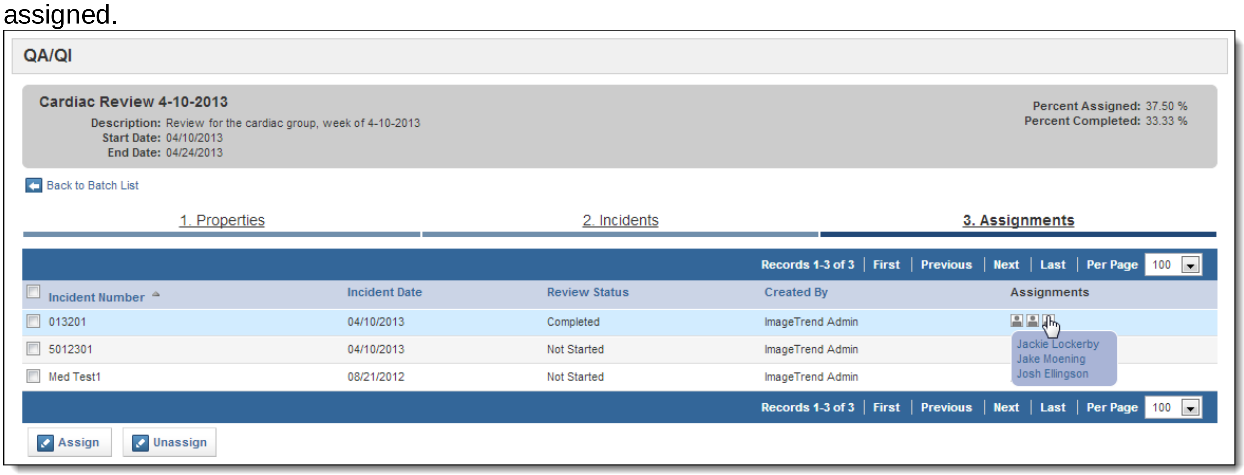
The **Incidents** tab displays a list of all incidents that meet the criteria defined in the *Properties* tab, (including criteria that are part of the selected view) and details about which incidents have been assigned.

NOTE: Incidents that have already been assigned for this batch will have an icon in the *Assignments* column for each person who was assigned to review the incident. Hovering over the *Assignment* icons will display the names of the people who were assigned.



The **Assignments** tab displays a list of all assigned incidents for this batch. No incidents meeting your criteria that were not assigned will appear in this tab.

NOTE: An icon will be displayed in the *Assignments* column for each person who was assigned to review the incident. Hovering over the *Assignment* icons will display the names of the people who were assigned.



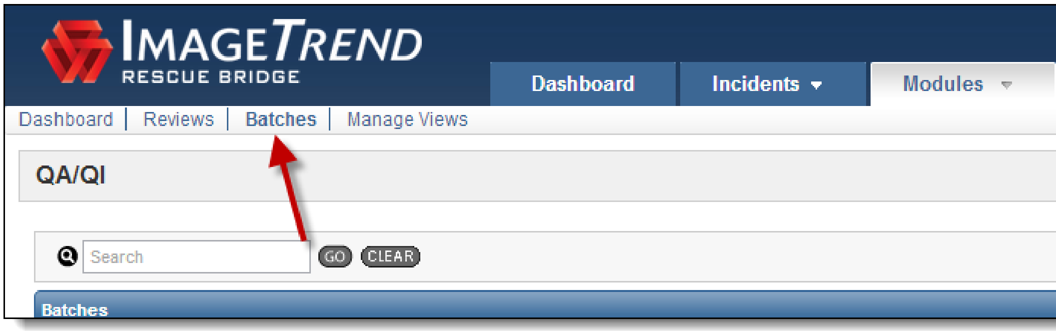
Each incident has a QA/QI status for the batch, which indicates its progress. Reviewers can set the status of the incident for the batch and it will be displayed in the *Review Status* column on the *Incidents* and the *Assignments* tabs. Once a reviewer sets the QA/QI status to *Complete,* the *Percent Completed* statistic in the header will be updated.

8.10 Creating a Batch

You can create a batch each time you want to assign reviewers for specific incidents.

1. If necessary, in the upper left, click *My Service.*
   The home page for your agency appears.
2. Under the *Modules* tab, select *QA/QI.*
   The *Dashboard* page for the QA/QI module appears.

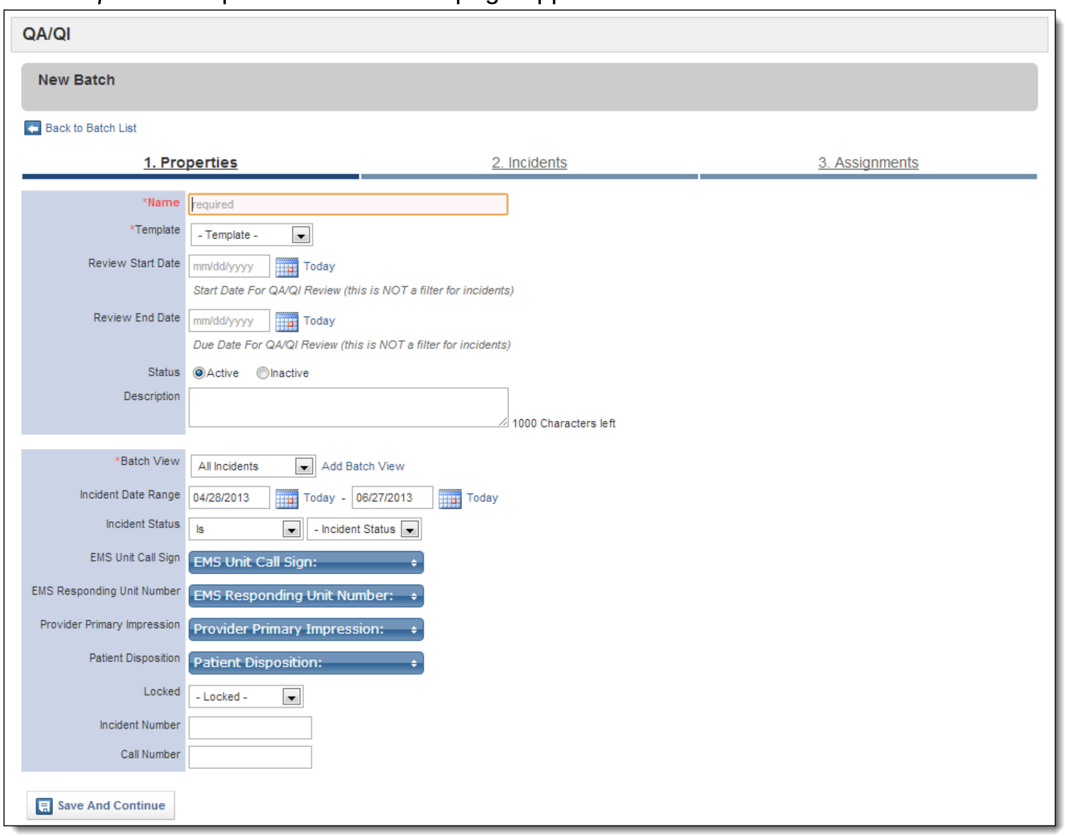
3. Click the *Batches* link.



A list of existing batches appears.

4. Click *Add New Batch.*

The *Properties* step of the *New Batch* page appears.



5. In the *Name* text box, type a name for the batch.

   HINT: It is useful to have a name that you can recognize later if you want to check on the progress of reviews.

6. From the *Template* drop down menu, select the QA/QI template that reviewers should use to review each incident.

7. In the first *Review Date* text box, type the first date that this batch should be available for QA/QI review.

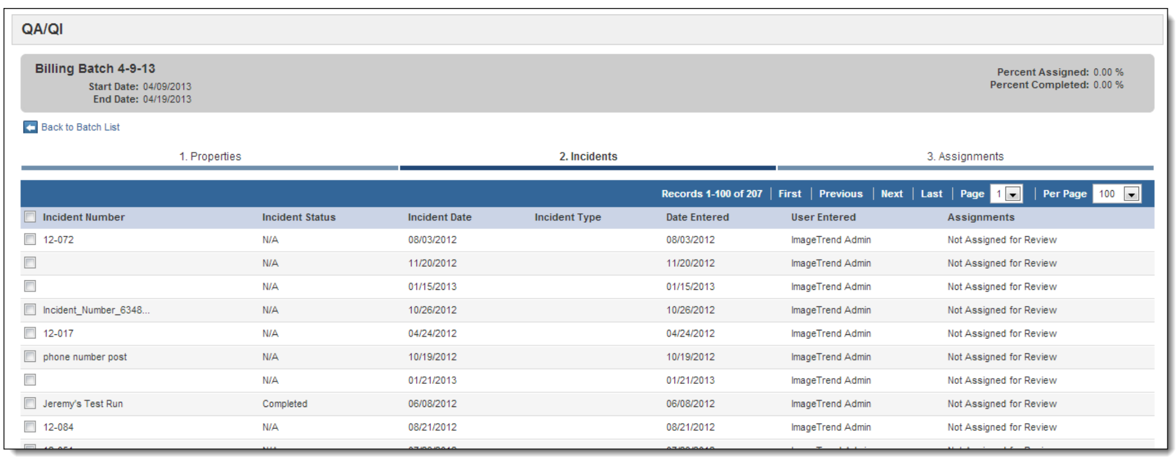
   OR

   To select a date from a calendar, click the *Calendar* icon and select the desired date.

   OR

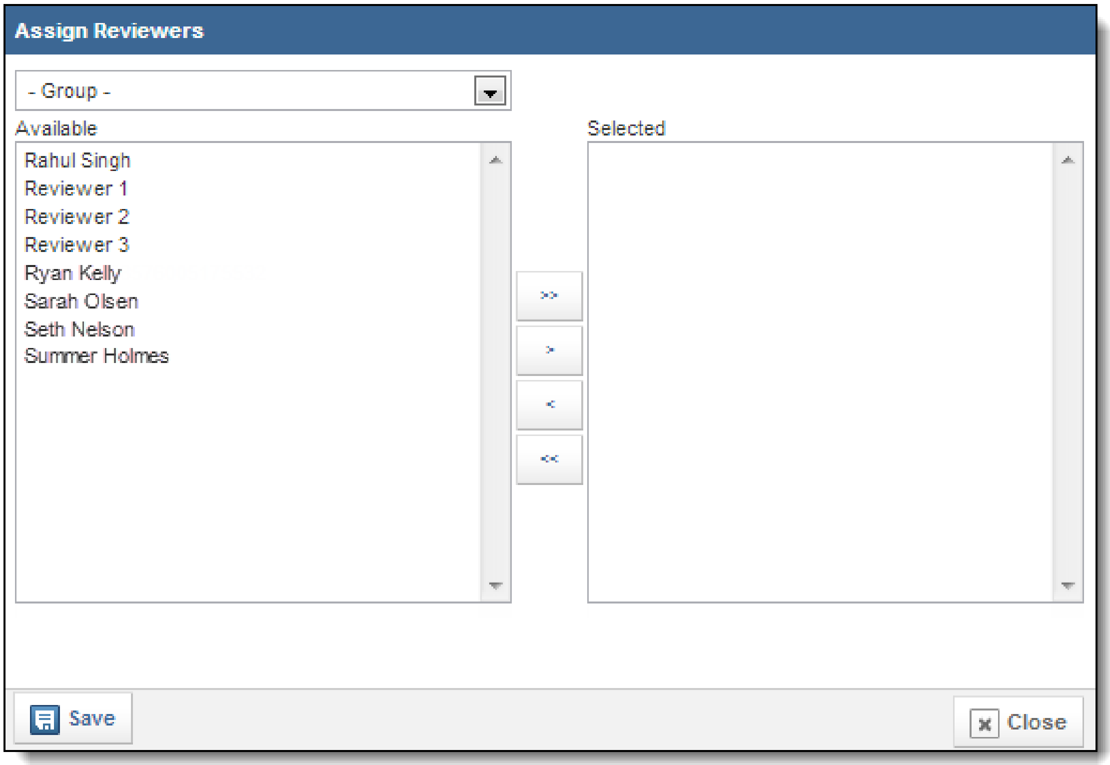
   To enter the current date, click the *Today* link.

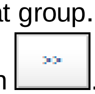
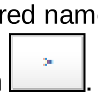
8. In the second *Review Date* text box, type the date that QA/QI review should be finished.
   OR
   To select a date from a calendar, click the *Calendar* icon and select the desired date.
   OR
   To enter the current date, click the *Today* link.
9. In the *Description* text box, type any additional details that can be viewed by anyone who views this batch.
10. From the *Batch View* drop down menu, select the view that you want to select incidents from to be included in this batch.
    NOTE: If you have the appropriate permissions, you can also click the *Add View* link to add a new view to use for this batch.
11. To set up search criteria to locate incidents to include in this batch, enter your search criteria in the remaining fields on the page.
    HINT: These criteria will build the list of incidents from which you can randomly select incidents; all incidents that meet these criteria will not be automatically included.
12. Click *Save And Continue.*
    The *Incidents* page appears, with a list of all incidents that met the criteria for the batch and the selected view.



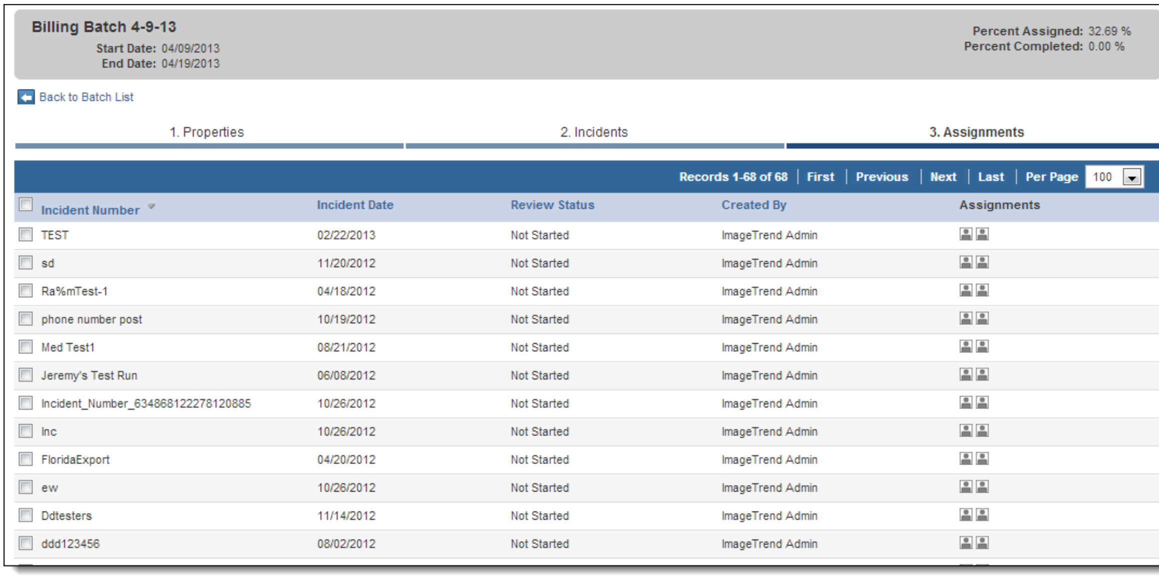
13. From the *Per Page* drop down menu at the top or the bottom of the page, select the number of incidents you want to assign people to review.
    The page is refreshed to display that many incidents.
14. To select all the incidents on the page, select the checkbox in the header row.
    OR
    To select only certain incidents, select those checkboxes.

15. To assign the selected incidents to reviewers, from the bottom of the page, click *Assign.*
    The *Assign Reviewers* modal window appears.



16. From the *Group* drop down menu, select the group of reviewers who should be assigned to this batch.
    The names in the *Available* scroll list are narrowed down to only those included in that group.
17. To add all people currently displayed in the *Available* scroll list, select the *Add All* icon .
    OR
    To add only certain people,
    a. In the *Available* scroll list, select the people to add.
       HINT: To select multiple names at the same time, press and hold the *Ctrl* key while clicking each desired name.
    b. Click the *Add* icon .
    c. Repeat steps a–c until all desired reviewers are added.
18. When finished adding all reviewers to the batch, click *Save.*
    You are brought to the *Assignments* page, with a list of each incident included in this batch and

icons in the *Assignments* column for each assigned reviewer.



Billing Batch 4-9-13
Start Date: 04/09/2013
End Date: 04/19/2013

Percent Assigned: 32.69 %
Percent Completed: 0.00 %

Back to Batch List

1. Properties | 2. Incidents | 3. Assignments

Records 1-68 of 68 | First | Previous | Next | Last | Per Page 100

Incident Number	Incident Date	Review Status	Created By	Assignments
TEST	02/22/2013	Not Started	ImageTrend Admin	
sd	11/20/2012	Not Started	ImageTrend Admin	
Ra%mTest-1	04/18/2012	Not Started	ImageTrend Admin	
phone number post	10/19/2012	Not Started	ImageTrend Admin	
Med Test1	08/21/2012	Not Started	ImageTrend Admin	
Jeremy's Test Run	06/08/2012	Not Started	ImageTrend Admin	
Incident_Number_634868122278120885	10/26/2012	Not Started	ImageTrend Admin	
Inc	10/26/2012	Not Started	ImageTrend Admin	
FloridaExport	04/20/2012	Not Started	ImageTrend Admin	
ew	10/26/2012	Not Started	ImageTrend Admin	
Ddtesters	11/14/2012	Not Started	ImageTrend Admin	
ddd123456	08/02/2012	Not Started	ImageTrend Admin	

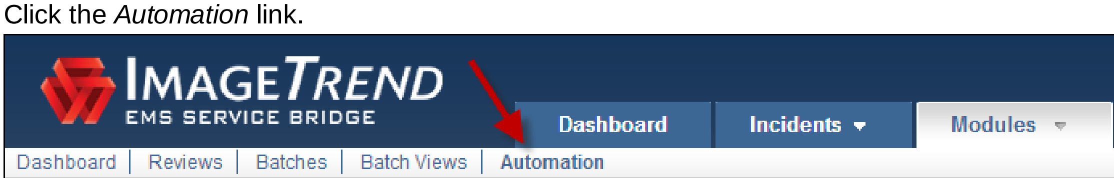
19. **OPTIONAL:** If you want to assign different people to additional incidents for this batch,
    a. Click the *2. Incidents* link.
    b. Repeat steps 13–18.

8.11 Setting Up Automated Batches

You can set the system up to create batches automatically each day based on settings that you configure for your agency. If you choose to create batches automatically, the system will create new a new batch daily, select a random number or percentage of incidents for review and assign reviewers from a list that you set up.

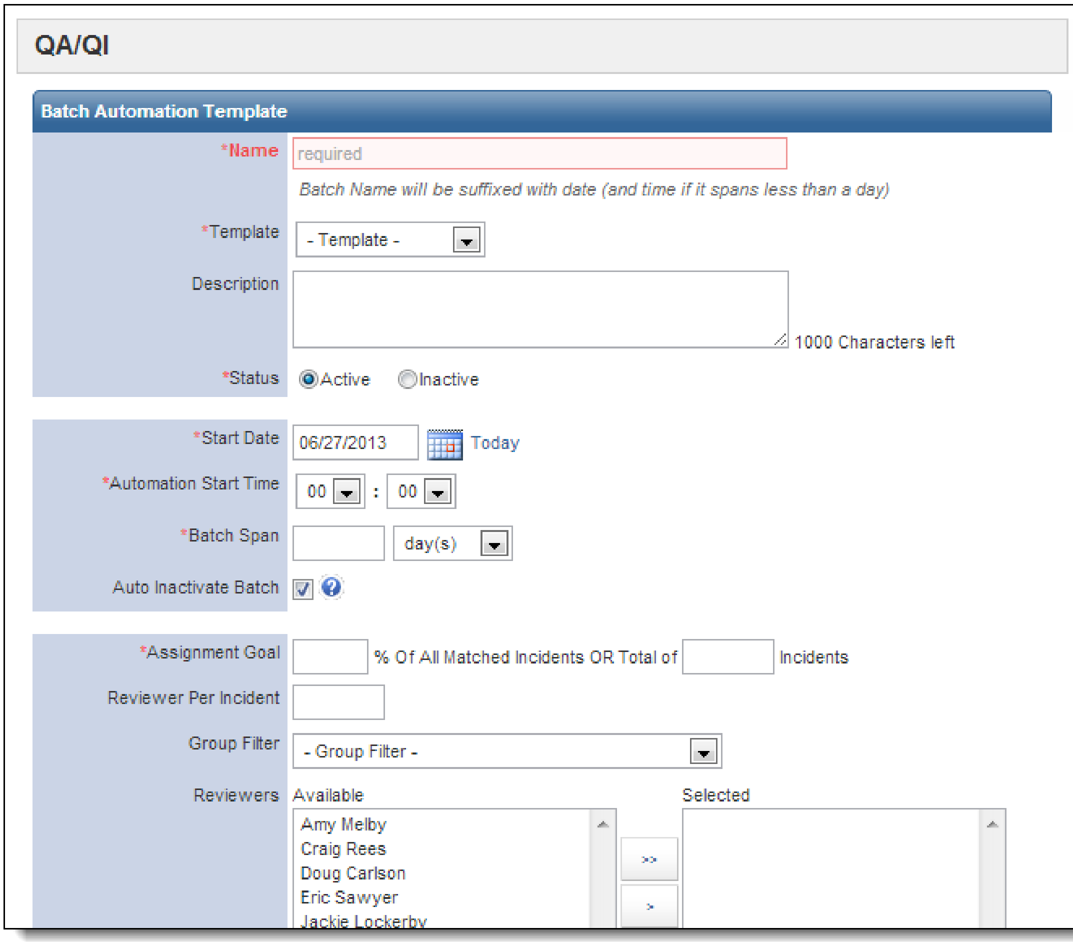
You can set the system to create multiple batches automatically, each based on a different group of settings. Each group of settings that you create that will automatically create batches is called an **automation template**.

1. If necessary, in the upper left, click *My Service.*
   The home page for your agency appears.
2. Under the *Modules* tab, select *QA/QI.*
   The *Dashboard* page for the QA/QI module appears.
3. Click the *Automation* link.



A list of existing automation templates appears.

4. Click *Add Automation Template.*
   The *Batch Automation Template* page appears.



5. In the *Name* text box, type the name for this template and all batches created from the template.
   NOTE: Each batch created from this template will also contain the date (and, if applicable, time) that the batch was created to differentiate between batches created from this template.
6. From the *Template* drop down menu, select the QA/QI form that should be used when reviewers review incidents in this batch.
7. **OPTIONAL:** In the *Description* text box, type any additional details that can be viewed by anyone who views this batch.
8. In the *Status* drop down menu, select whether this template should be active or inactive.
   HINT: If you mark this template as active, the system will automatically begin creating daily batches from it once you have saved it and once the start date and time (set up in the next steps) are reached. If you mark it as inactive, no batches will be automatically created until you mark it as active, even if the start date is in the past.
9. In the *Start Date* text box, type the first date that a batch should be created.
   OR

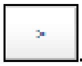
   To select the date from a calendar, click the *Calendar* icon and select the desired date.
   OR
   To enter the current date, click the *Today* link.
10. From the *Automation Start Time* drop down menus, select the time that the batches should be automatically created.

HINTS:
The time should be set using a 24-hour clock.
The first batch will not be created until the selected time on or after the start date that you specified. If you are setting up a batch to begin immediately (e.g., the batch is active and the start date is set to today's date) and you set the time to before the current time (e.g., it is 8 a.m. and you set the batch to run at 6 a.m.), the batch will not run until the next day.

11. In the *Batch Span* section, enter the amount of time that you want incidents to be pulled from for each batch (e.g., if you only want incidents for the previous day in each batch, enter *1 day*).
12. To automatically mark the previous day's batch as inactive as soon as the new one is created, ensure that the *Auto Inactivate Batch* checkbox is selected.
13. In the *Assignment Goal* section, enter either the desired percentage of all incidents matching your criteria or the desired number of incidents matching your criteria that need to be included in each batch.

    NOTE: You will set up the criteria that incidents must meet in order to be included in the batch in following steps.
14. In the *Reviewer Per Incident* text box, type the number of individuals that should be assigned to review each incident included in the batch.
15. To set the list of individuals who can be assigned to the incidents in the batches created from this template,

    NOTE: The system will randomly assign the selected number of reviewers to each incident in each batch created from this template; this allows you to select which reviewers should be assigned for the batches based on this template.
    a. **OPTIONAL:** To narrow down the list of reviewers in the *Available* list for easier selection, from the *Group Filter* drop down menu, select the group of reviewers you want to work with.
       The list of reviewers in the *Available* list is filtered to show only those in the selected group.
    b. In the *Reviewers* section, in the *Available* scroll list, select the reviewer(s) that should be available for assignment.

       HINT: To add multiple names at once, press and hold the *Ctrl* key while clicking each desired name.
    c. Click the *Add* icon .
    d. Repeat steps a–c until all desired reviewers are added.
16. From the *Batch View* drop down menu, select the view that you want to select incidents from to be included in this batch.

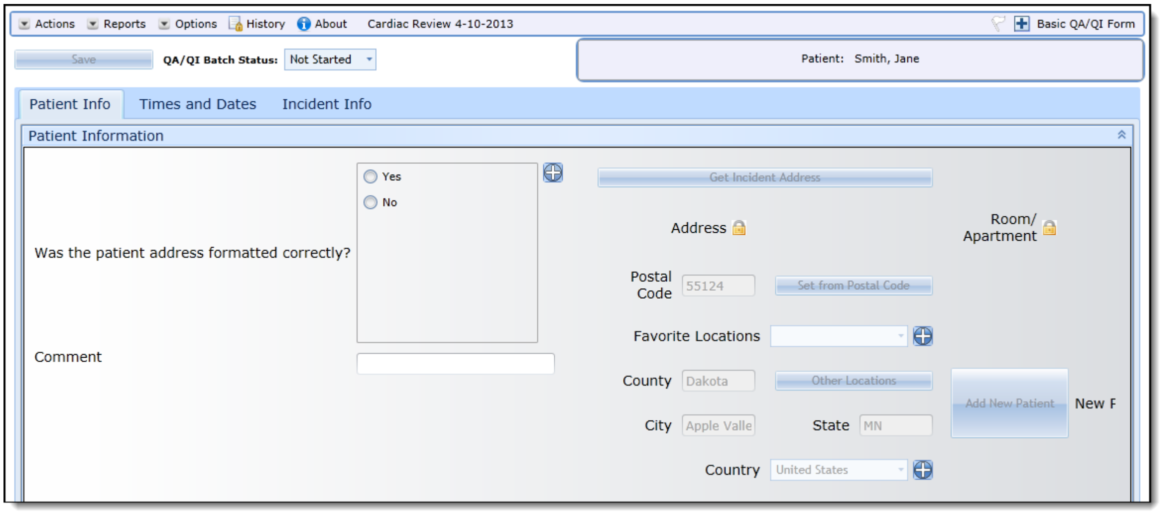
    NOTE: If you have the appropriate permissions, you can also click the *Add Batch View* link to add a new view to use for this batch.
17. To set up search criteria to locate incidents to include in this batch, enter your search criteria in the remaining fields on the page.

    HINT: These criteria will build the list of incidents from which you can randomly select incidents; all incidents that meet these criteria will not be automatically included.
18. Click *Save.*
    The template is created and batches will be automatically created based on the start date and time.

8.12 Reviewing an Incident

Reviewers can open incidents to review either from a widget on the *Dashboard* tab of the QA/QI module or from the *Reviews* tab. The *Reviews* tab will contain a full list of reviews that are assigned to this reviewer, while most Dashboard widgets will display an abbreviated list.

1. From the Dashboard or the *Reviews* page, click any of the linked text to open the incident you need to review.
2. If prompted, enter your reason for viewing the incident and click *Submit*.
   The QA/QI form for this incident appears.
   HINT: Depending on your service's audit tracking settings, you may or may not be prompted to enter a reason for viewing this incident.



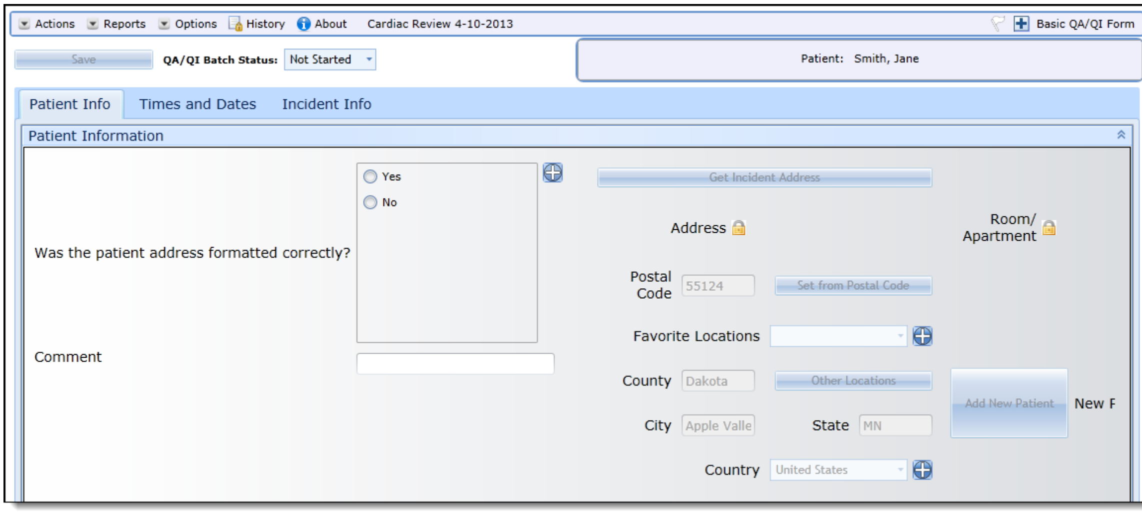
3. Using the editable fields, fill out the review form.
   NOTE: The forms that you need to fill out will be editable; incident information will be read-only.
4. When you are finished, click *Save.*
   Your changes to the form are saved.
   NOTE: After the first time you save the form, the QA/QI status of this incident will be updated to *In Progress* if it has not already been updated.

8.13 Sending a QA/QI Note

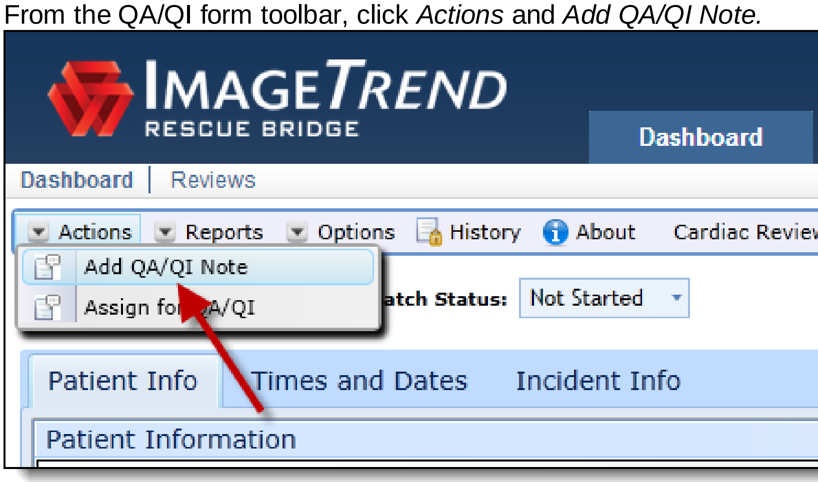
QA/QI notes can be sent from your QA/QI review forms. QA/QI notes will be sent through the Inbox for your system.

1. From the Dashboard or the *Reviews* page, click any of the linked text to open the incident you need to review.
2. If prompted, enter your reason for viewing the incident and click *Submit*.
   The QA/QI form for this incident appears.
   HINT: Depending on your service's settings, you may or may not be prompted to enter a

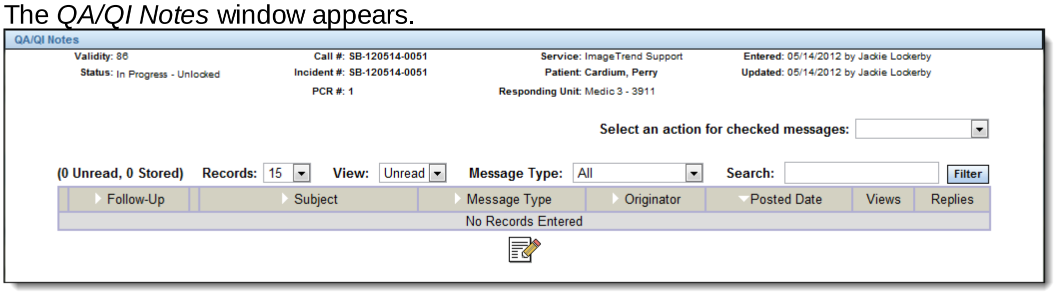
reason for viewing this incident.



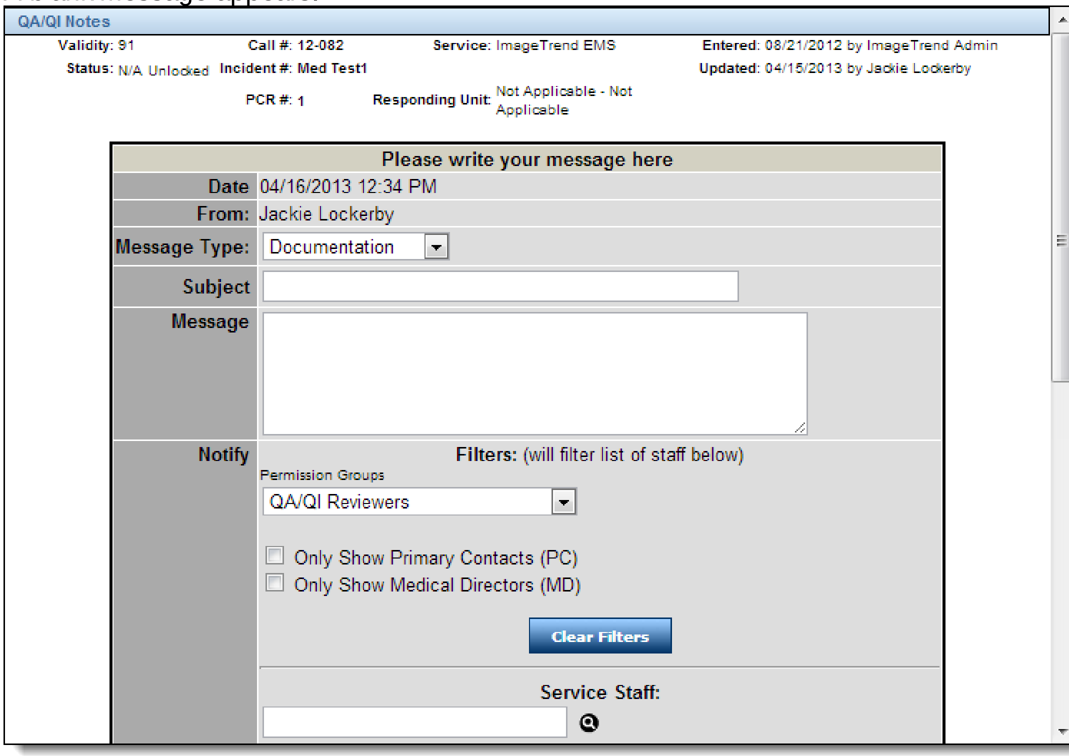
3. From the QA/QI form toolbar, click *Actions* and *Add QA/QI Note.*



The *QA/QI Notes* window appears.



4. Click the *New Message* icon .
   A blank message appears.



5. From the *Message Type* drop down menu, select the category for this message.
6. In the *Subject* text box, type a name for the message.
7. In the *Message* text box, type the body of the note.
   NOTE: Information must be typed in the *Message* text box before the message can be sent.
8. In the *Notify* section, to add additional staff members who should receive this message in their inbox,
   NOTE:
   Staff for the service will be listed in the *Service Staff* scroll list. You can use the fields in the *Filters* section to narrow down which staff should be displayed in the *Service Staff* section.
   System administrators will be listed in the *Administrative Contacts* section.
   Multiple staff members can be selected from this section by pressing and holding *Ctrl* while clicking each name.
   A link to the incident report will also be included in the message.
   a. To add staff from the service associated with this run form,
      i. From the *Available* scroll list for the *Service Staff* section, select the staff members
      ii. Click the *Add* icon >.
         NOTE: Multiple staff members can be selected from this section by pressing and holding *Ctrl* while clicking each name.
   b. To add all staff from this service who are in a specific permission group,
      i. From the *Available* scroll list in the *Permission Groups* section, select the desired permission group.
      ii. Click the *Add* icon >.
         NOTE: Multiple permission groups can be selected from this section by pressing and holding *Ctrl* while clicking each group name.
   c. To include an administrative contact for the system in this message,

i. From the *Available* scroll list in the *Administrative Contacts* section, select the desired name.

ii. Click the *Add* icon >.

NOTE: Multiple names can be selected from this section by pressing and holding *Ctrl* while clicking each name.

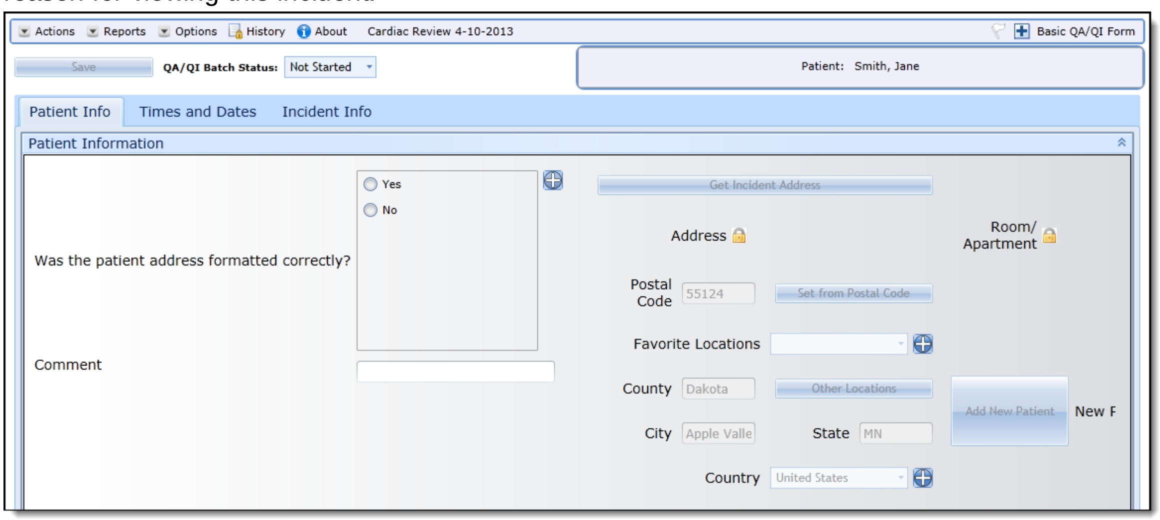
9. To send emails with the message to all selected staff at the email address listed in their profile, select the *Send an email in addition to the Inbox, if available* checkbox.
10. To post the note, click *Submit.*

8.14 Updating the QA/QI Status of the Incident

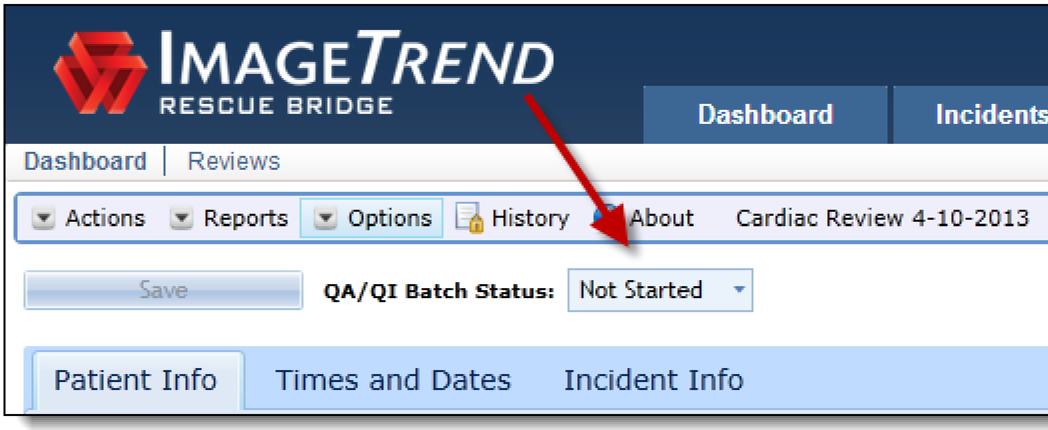
Each incident has a QA/QI status for each batch of reviews that it is included in. This status reflects its progress in being reviewed by all reviewers who are assigned to review it for a specific batch, so if you update the status it will be updated for all reviewers and for the administrators tracking the progress of reviews.

NOTE: The status of the QA/QI status will automatically be updated to *In Progress* when you enter an answer to one or more questions and save the form.

1. From the Dashboard or the *Reviews* page, click any of the linked text to open the incident you need to review.
2. If prompted, enter your reason for viewing the incident and click *Submit*.
   The QA/QI form for this incident appears.
   HINT: Depending on your service's settings, you may or may not be prompted to enter a reason for viewing this incident.

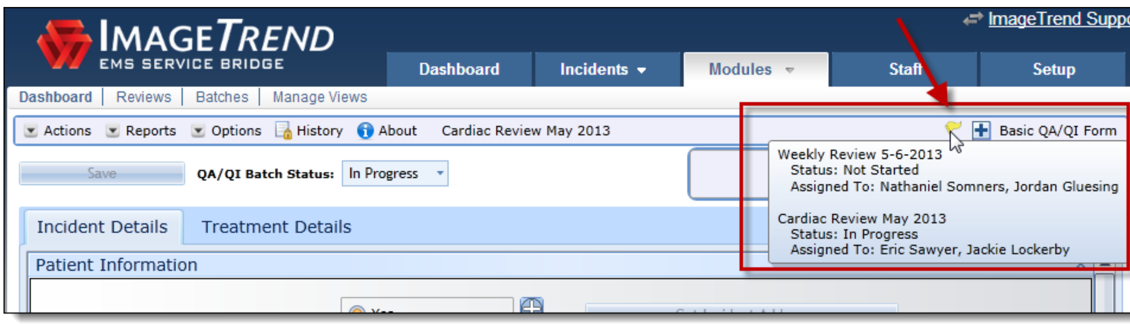


3. From the *QA/QI Batch Review* drop down menu, select the status that should be applied to this incident for this batch.



The status is updated.

NOTE: The overall QA/QI status of the incident for ALL batches it is included in will be indicated by a flag in the upper right. Hovering over this flag will display the incident's status for each batch of reviews it is included in.

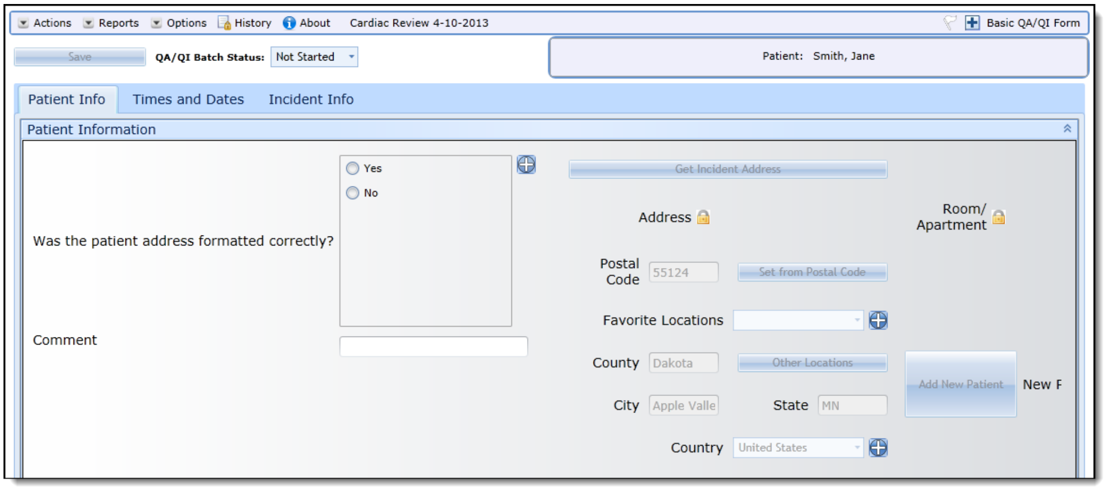


8.15 Assigning Review to Another Staff Member

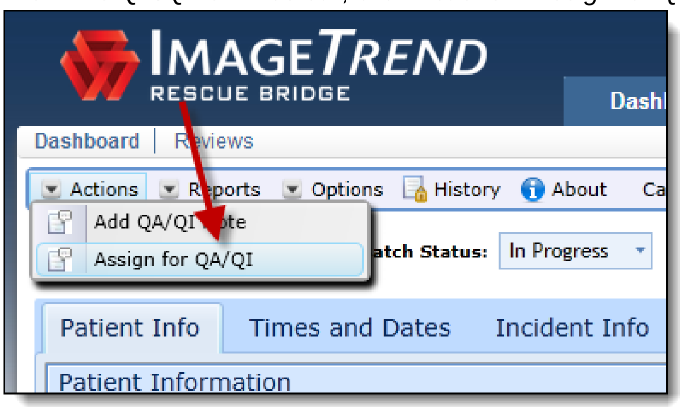
If you have the ability to assign reviewers, you can assign a new reviewer to an incident for the batch you are working with.

1. From the Dashboard or the *Reviews* page, click any of the linked text to open the incident you need to review.
2. If prompted, enter your reason for viewing the incident and click *Submit*.
   The QA/QI form for this incident appears.
   HINT: Depending on your service's audit tracking settings, you may or may not be prompted

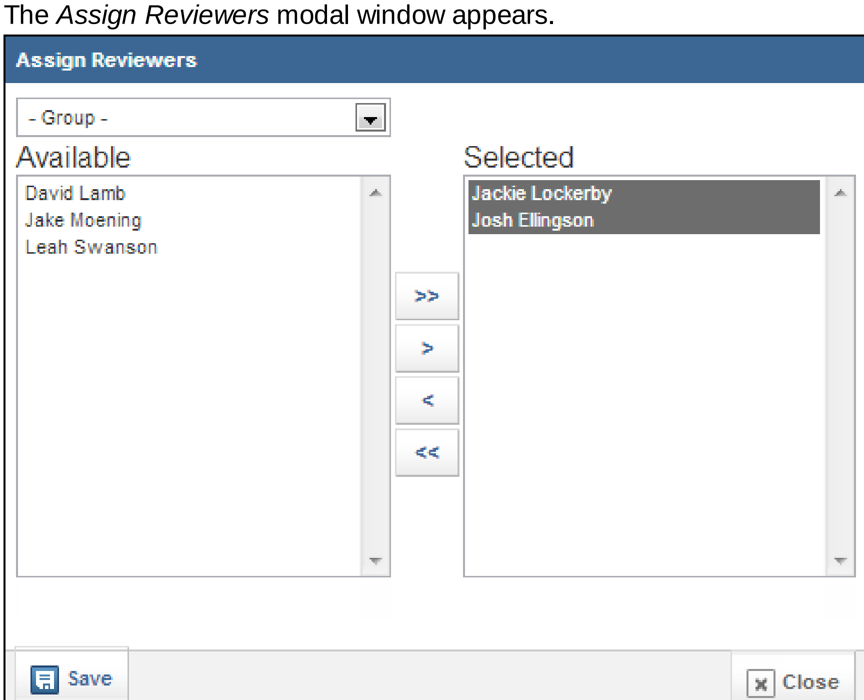
to enter a reason for viewing this incident.



3. From the QA/QI form toolbar, click *Actions > Assign for QA/QI.*



The *Assign Reviewers* modal window appears.

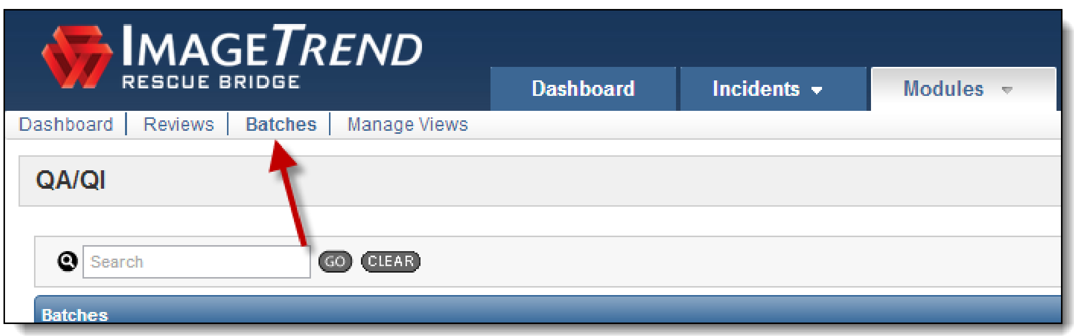


4. **OPTIONAL:** From the *Group* drop down menu, select the group containing the reviewer(s) you want to add to this batch.
   The names in the *Available* scroll list are narrowed down to only those included in that group.
5. To add all people currently displayed in the *Available* scroll list, select the *Add All* icon .
   OR
   To add only certain people,
   a. In the *Available* scroll list, select the people to add.
      HINT: To select multiple names at the same time, press and hold the *Ctrl* key while clicking each desired name.
   b. Click the *Add* icon .
   c. Repeat steps a–c until all desired reviewers are added.
6. Click *Save.*
   The new reviewers are added.

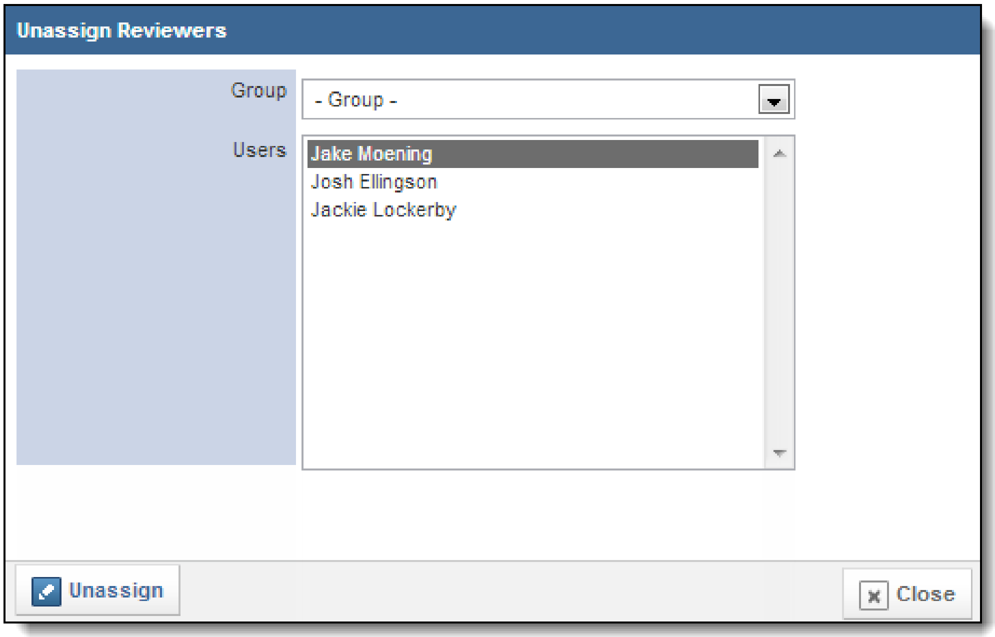
8.16 Un-Assigning Reviewers for an Incident

Administrators can un-assign any reviewers from a specific incident by editing the batch.

1. If necessary, in the upper left, click *My Service.*
   The home page for your agency appears.
2. Under the *Modules* tab, select *QA/QI.*
   The *Dashboard* page for the QA/QI module appears.
3. Click the *Batches* link.



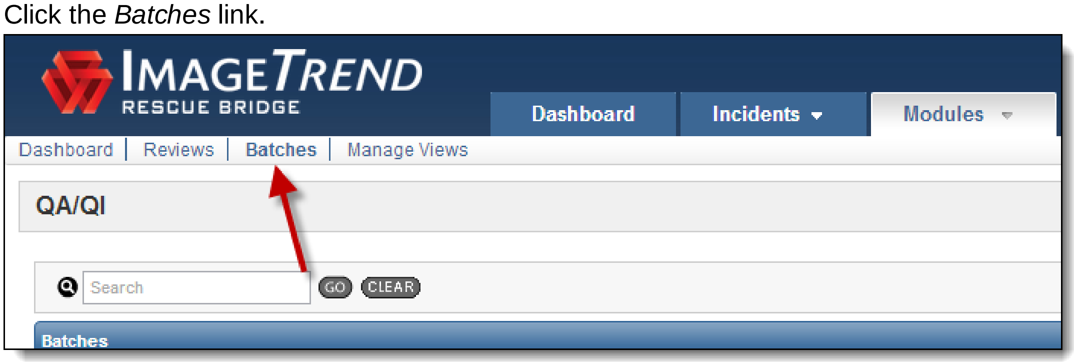
   A list of existing batches appears.
4. Click the name of the batch for which you want to un-assign reviewers.
   The batch opens with the *Assignments* page displayed by default.
5. Select the checkbox for the incident you want to un-assign reviewers for.

6. Click *Unassign.*
   The *Unassign Reviewers* modal window appears.
   

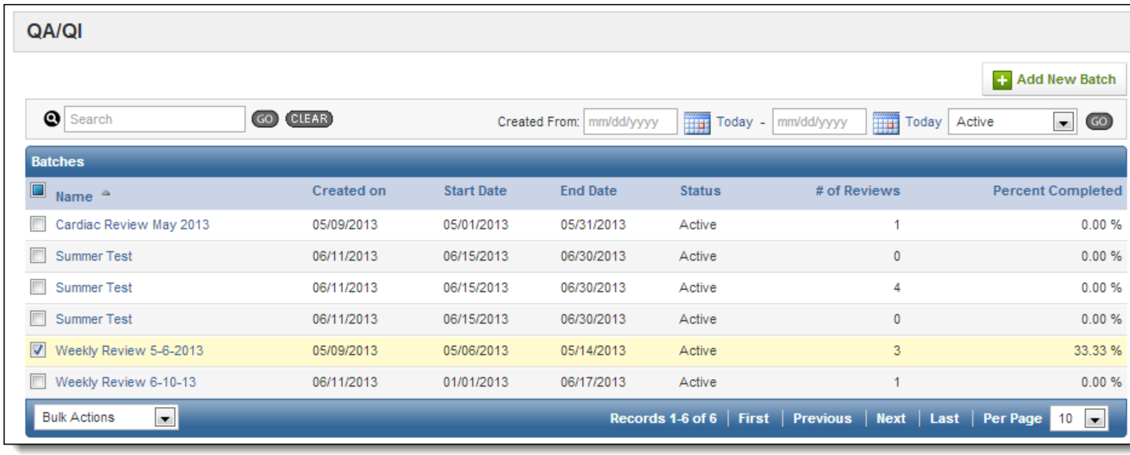
7. **OPTIONAL:** To narrow down the users currently displayed in the *Users* list by group, from the *Group* drop down menu, select the desired group.
8. Select the user(s) you want to un-assign.
   HINT: To select multiple names, press and hold the *Ctrl* key while clicking each name.
9. Click *Unassign.*
   The selected reviewers are unassigned and the *Unassign Reviewers* modal window closes.

8.17 Changing the Status of Multiple Batches

You can quickly activate or deactivate multiple batches at the same time.

1. If necessary, in the upper left, click *My Service.*
   The home page for your agency appears.
2. Under the *Modules* tab, select *QA/QI.*
   The *Dashboard* page for the QA/QI module appears.
3. Click the *Batches* link.
   

A list of existing batches appears.



4. Select the checkbox(es) for each batch you want to change the status for.
   HINT: All the batches you select will be set to the same status. To set other batches to a different status, you will need to repeat these steps.
5. From the *Bulk Actions* drop down menu in the lower left, select *Activate Batches* or *Inactivate Batches,* as appropriate.
   The status of the selected batches is updated.

CHAPTER 9

USING THE DATA EXCHANGE

9.1 Chapter Overview

Data exchange is customized individually for each of ImageTrend's clients. This chapter explains the basic capabilities of the Data Exchange feature.

9.2 Introduction to Data Exchange

The State Bridge allows data exchange based on the client's needs, which lets information be sent between programs for various purposes. This can include sending information to a state or national database, sending information to a billing company or importing a list of staff and their contact information. Since the needed types of data exchange are customized for each client, clients should contact ImageTrend for instructions on their particular settings or to set up additional exchanges.

ImageTrend's EMS State Bridge provides a data exchanges to multiple formats and for multiple integrations, including:

Agencies:
- GAPCR 2000
- NEMSIS
- NHTSA
- NISE

Billing Integration:
- Accordis
- Ortivus Amazon Sweet Soft
- Quadax
- Zoll RescueNet (also known as Sanitaas)

CAD Integration:
- TriTech
- Motorola PrinTrack
- Digitech
- FirstWatch Logistics

Trauma Integration:
- Collector

Vendors:
- CodeRed
- Firehouse Import Export
- Zoll Data Systems
- Sansio (Scanhealth)

Other Formats:
- ODBC
- Microsoft Access
- CSV
- Flat file formats
- XML

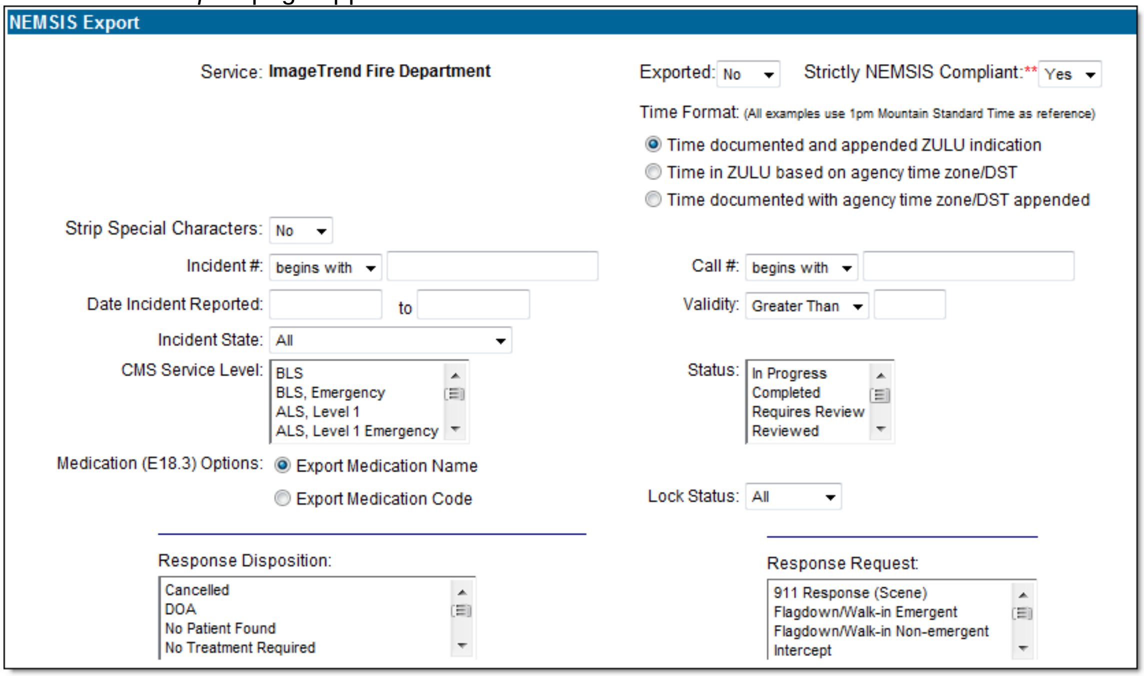
9.3 Creating a NEMSIS Export XML

You can generate an XML file to export to NEMSIS using the NEMSIS export tool in the State Bridge.

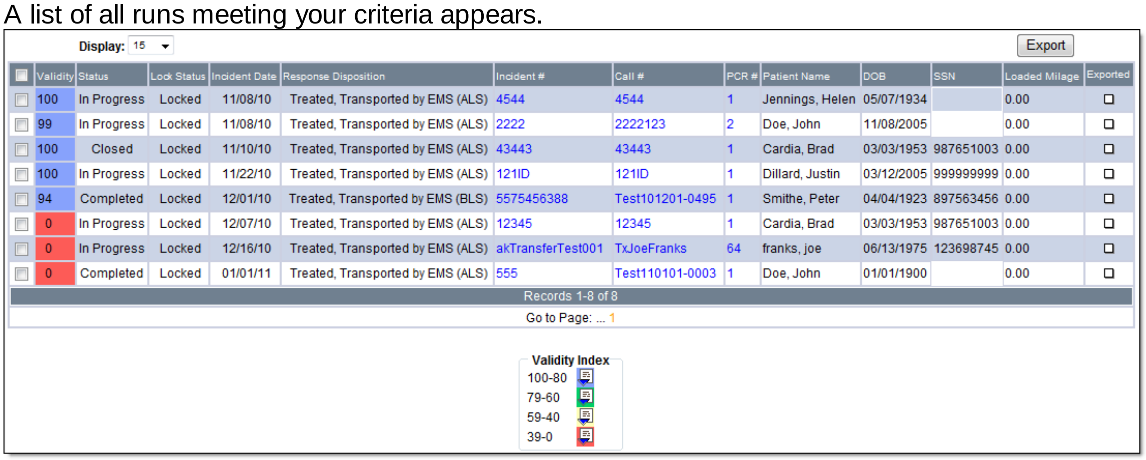
1. From the upper left, click *Data Exchange.*
   The *Data Exchange* page appears.
2. From the left menu, click *NEMSIS Export.*
   A sub-menu appears.
3. Click *Generate Events XML.*

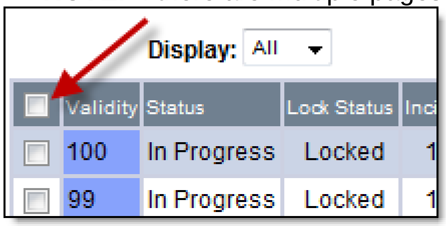
   The *NEMSIS Export* page appears.

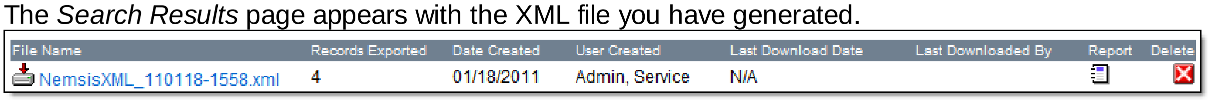
4. From the *Exported* drop down menu, select whether you want to include runs that have been previously exported.
   HINT: To include only runs that have not previously been exported, select *No.*
5. From the *Strictly NEMSIS Compliant* drop down menu, select whether this file should be strictly NEMSIS compliant.
6. Use the remaining fields to enter any additional criteria that runs must meet in order to be included in this export.
7. When finished, from the bottom of the page, click *Search.*
   A list of all runs meeting your criteria appears.



	Validity	Status	Lock Status	Incident Date	Response Disposition	Incident #	Call #	PCR #	Patient Name	DOB	SSN	Loaded Milage	Exported
	100	In Progress	Locked	11/08/10	Treated, Transported by EMS (ALS)	4544	4544	1	Jennings, Helen	05/07/1934		0.00	
	99	In Progress	Locked	11/08/10	Treated, Transported by EMS (ALS)	2222	2222123	2	Doe, John	11/08/2005		0.00	
	100	Closed	Locked	11/10/10	Treated, Transported by EMS (ALS)	43443	43443	1	Cardia, Brad	03/03/1953	987651003	0.00	
	100	In Progress	Locked	11/22/10	Treated, Transported by EMS (ALS)	121ID	121ID	1	Dillard, Justin	03/12/2005	999999999	0.00	
	94	Completed	Locked	12/01/10	Treated, Transported by EMS (BLS)	5575456388	Test101201-0495	1	Smithe, Peter	04/04/1923	897563456	0.00	
	0	In Progress	Locked	12/07/10	Treated, Transported by EMS (ALS)	12345	12345	1	Cardia, Brad	03/03/1953	987651003	0.00	
	0	In Progress	Locked	12/16/10	Treated, Transported by EMS (ALS)	akTransferTest001	TxJoeFranks	64	franks, joe	06/13/1975	123698745	0.00	
	0	Completed	Locked	01/01/11	Treated, Transported by EMS (ALS)	555	Test110101-0003	1	Doe, John	01/01/1900		0.00	

8. If there are several pages of incidents, to view them all, select *All* from the *Display* drop down menu.
9. To select all incidents to be included in the export, select the checkbox in the header row.
   NOTE: If there are multiple pages of incidents, only the incidents on this page will be selected.
   

   OR
   To select individual runs, select the checkbox for each one to include.
10. Click *Export.*
    A confirmation page appears with information about the pending export.
    NOTE: For more information about a specific configuration option, hover over the question mark icon.
    

11. To automatically lock calls to prevent further editing once they are posted, in the *Lock Calls Upon Export* section, select *Yes.*
12. To automatically update the status of the run to reflect this posting and to list it in the audit tracking report, in the *Update Status Upon Export* section, select *Yes.*
13. When ready, click *Continue.*
    The *Search Results* page appears with the XML file you have generated.
    

File Name	Records Exported	Date Created	User Created	Last Download Date	Last Downloaded By	Report	Delete
NemsisXML_110118-1558.xml	4	01/18/2011	Admin, Service	N/A			

14. To download the file, click the *Download* icon and use the dialog box to save or open the file.
15. To view the incidents included in this file, click the *Report* icon.

CHAPTER 10

WORKING WITH THE REPORT WRITER

10.1 Chapter Overview

This chapter explains the capabilities of the Report Writer, the types of reports that can be created and how to create and customize reports.

10.2 Summary of Report Writer

The Report Writer allows users to dynamically create, display, and save transactional (ad hoc) report templates. This gives the user the power to find and display the data required without relying on static reports that may not include current data needs. The Report Writer encompasses a single reporting tool that gives the user complete control of data output and display.

You can choose from multiple ways to display your report, from familiar text-based reports to pie charts and mapping. You can report on multiple fields within several categories and data sets, allowing you to create exactly the report you want. Database search criteria can be selected based on each field allowing users to define exactly what they need. User defined headers, sorting, and grouping give users the ability to display search results using a number of options. Reports can be saved for later review or editing and also as a PDF document and CSV file (which can be opened and manipulated in a spreadsheet program such as Microsoft Excel).

In addition, standard reports and charts are available for quick report creation. All reports are listed in the left menu of Report Writer, organized by category.

10.3 Types of Reports

Report Writer provides several different types of reports to meet your needs. Each report listed in the left menu will display an icon to indicate which type of report it is.

Transactional Reports

While some transactional reports have a default setup of fields to display in a particular order, transactional reports can be entirely configured. Users can change which fields display, define additional criteria for each of those fields (e.g., display only records within a certain postal code) and change the order in which records appear. In addition, users can create transactional reports completely on their own with no pre-defined fields or setup.

Standard Reports

Standard reports are pre-created with all fields and display options defined for the user. Within the fields, users can define additional criteria (e.g., requesting information about a particular unit or type of service). These reports provide fewer configuration options and allow a ready-made report for common data requests.

10.4 Requesting Standard Reports and Charts

While several standard reports are available from the *All Reports* section, many additional reports can be found in Report Writer. These reports have pre-defined fields, although users can further define the criteria for each of those fields. For example, if the staff field is set to display, users can display data only for a particular staff member.

1. From the top left, click *Report Writer 2.0.*
   HINT: If your system has many modules, the *Report Writer* link may be under the *More* link in the upper left.

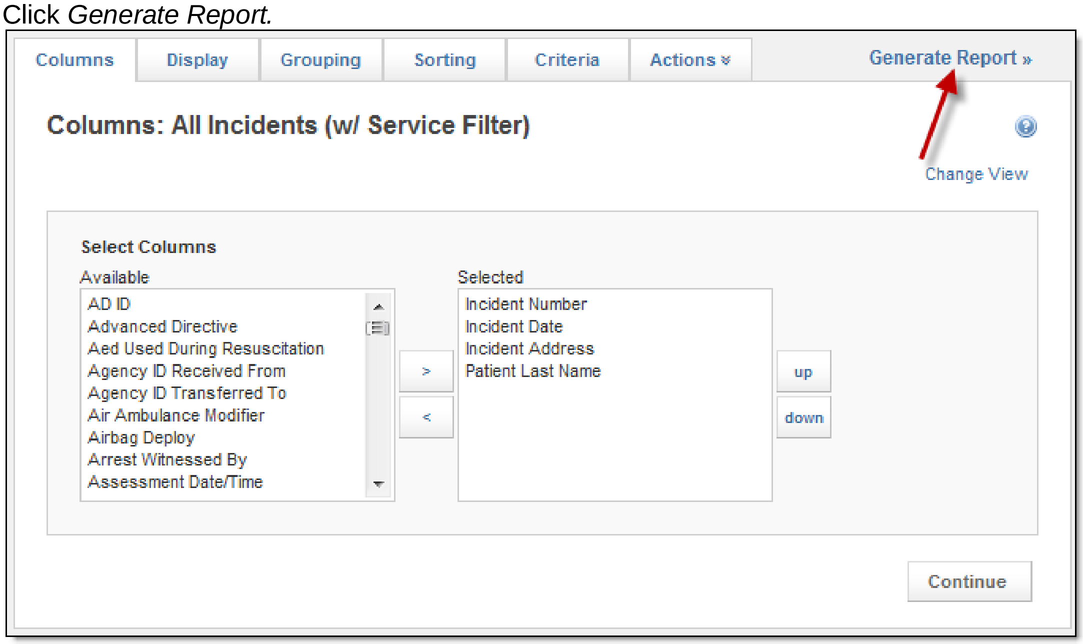
The *Report Writer* page appears.

2. If necessary, to expand a category of reports, in the *All Reports* section, click the category.

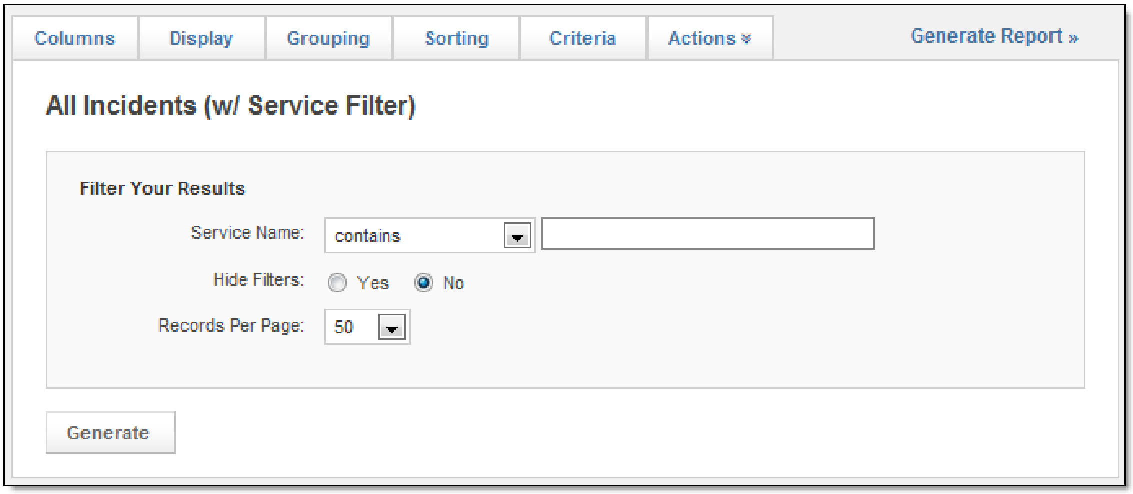
   HINT: Categories have a folder icon to their left. Reports have an icon indicating the type of report.

   NOTE: Clicking the category once will expand it to show all reports. Clicking it again will hide the reports under the category.
3. To begin a report creation, click the name of the desired report.
4. Using the provided fields, select any further defining criteria for each field.

   NOTE: Depending on the permissions set for this report, you may be able to set more or fewer options to further define the information in the report. These options will be available from each of the links at the top of the page (e.g., *Columns, Grouping*) and will work in the same way that these options work when creating a transactional report.
5. Click *Generate Report.*



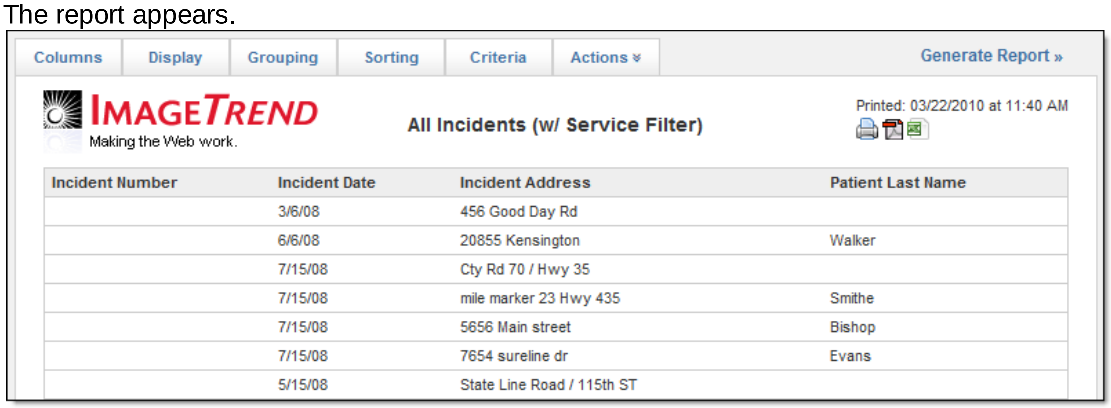
If filters have been selected, the *Filter your results* page appears.



NOTE: These filters are based on the fields selected in the *Filters* options.

6. From each of the filters, select the criteria that the results displayed should or should not match.
7. Click *Generate.*

   The report appears.



10.5 Additional Standard Report Options

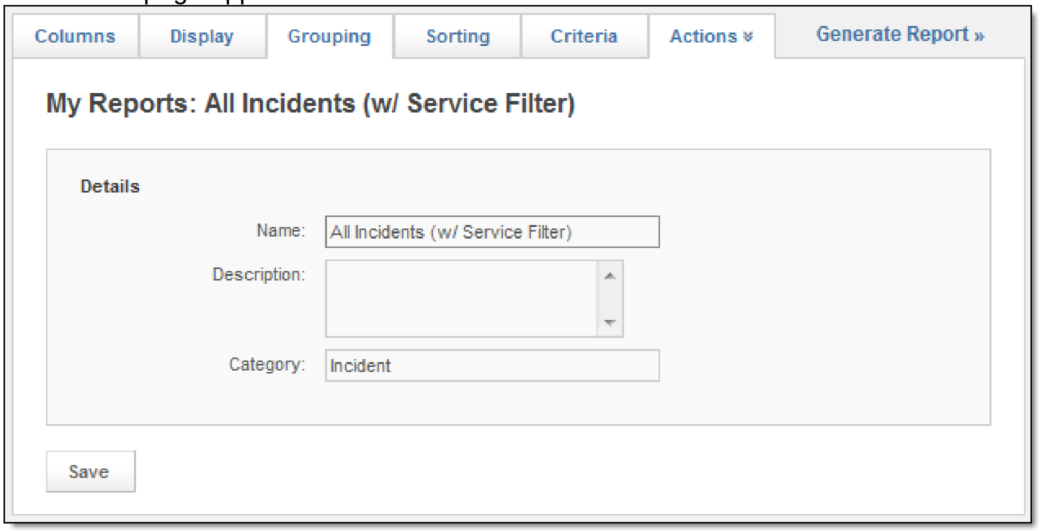
Standard reports allow users to print the report, export the report to a PDF or spreadsheet (.csv) file, or add the report to a *My Reports* category for quick access.

Adding Favorite Reports

Report Writer provides a *My Reports* category that can be configured for each user. Users may add reports to this category for easy access. Reports added to *My Reports* will also remain in their original categories.

1. Open and view the desired standard report.

2. Click the *Actions* tab and select *Add to My Reports.*
   The *Details* page appears.



3. **OPTIONAL:** In the *Name* text box, type a new name for this saved report.
   HINT: The new name will only appear on the report in your *My Reports* section, and will not affect the standard report for any other user.
4. **OPTIONAL:** In the *Description* text box, type any additional information about this report.
   HINT: The new description will only appear on the report in your *My Reports* section, and will not affect the standard report for any other user.
5. To add the report to the *My Reports* category, click *Save.*
   The report appears in the *My Reports* section.

Printing Reports

You can print a report if necessary.

1. Open and view the desired standard report.
2. Click *Print Report.*
   The *Print* window appears.
3. Select your printer.
4. Click *OK.*

10.6 Working with Transactional Reports

Creating a transactional report can be a simple or a detailed procedure, depending on the complexity of the report you want to create. Before beginning a transactional report, you should begin by considering each of the elements you will need to work with to create the report.

Category

Each report must belong to a category. This will help with organization and will determine the type of information contained within the report. Selecting a category will determine what fields are available for your use in this report.

Columns

Within a category, you can select pieces of information to be included in each column of the report. These pieces of information are based on the fields filled out throughout the application (e.g., the fields within a run report or a staff record). Each piece of information that should be examined or used as a criterion should be included for the report.

Display

On this page, users can set the display order of fields, select numeric fields to display averages, totals (previously called sums), the minimum value, maximum value and total number of records, determine the alignment of the field display and pre-define a date range for date fields.

HINT: To change the order of a field, only change the field you want moved; Report Writer will automatically update the order of the rest of the fields.

Grouping

If the records should be clustered according to a certain type of information (e.g., all run reports by service), you will need to set up grouping rules. You have the option to group multiple times (e.g., within each service, you could group all run reports by the chief complaint) for further organization. Each group can be sorted in ascending or descending order (e.g., if all run reports are organized by service, the services can be sorted alphabetically).

Sorting

If the records should be sorted alphabetically or numerically, you can choose to sort the records based on the results in each column (e.g., sorting staff alphabetically by last name). When used with grouping, you can only sort fields that have not been grouped. If grouping is also used, sorting will be applied after grouping. In this case, after all grouping has been performed and each group has been sorted according to their criteria, the records within each group will be sorted according to the criteria selected here.

Criteria and Filtering

Both criteria and filtering options are included in the *Criteria* tab. Criteria will allow you to determine limits on the data that will be displayed every time this report is displayed. For example, in a report that displayed all incidents for a certain service, criteria would be used to dictate that only records where the *Service* field contained the desired service name should be included.

Filters allow you to specify a new value for a criterion each time the report is run. For example, you could use filters to specify the dates that the report examines, so that each time the report is run, users can specify which dates they want to look at.

Criteria and filters are important for narrowing the number of results displayed. If your organization has hundreds or thousands of records in the system, this is very important to limit the length of the report and prevent the system from timing out when trying to retrieve a large number of records.

Preferences and Formatting

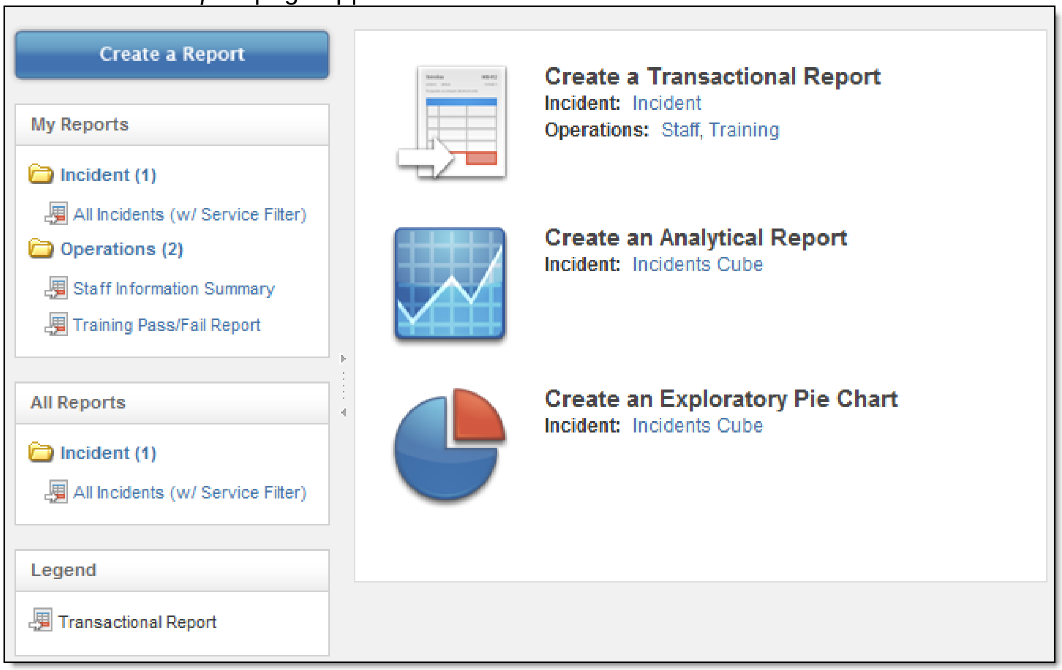
If you want to create a report with a custom look, you can change the headers and footers, as well as the colors for the text, each row, and the rows beginning each group of data. These options are available from the *Actions* tab, as well as many other report options.

Report Access

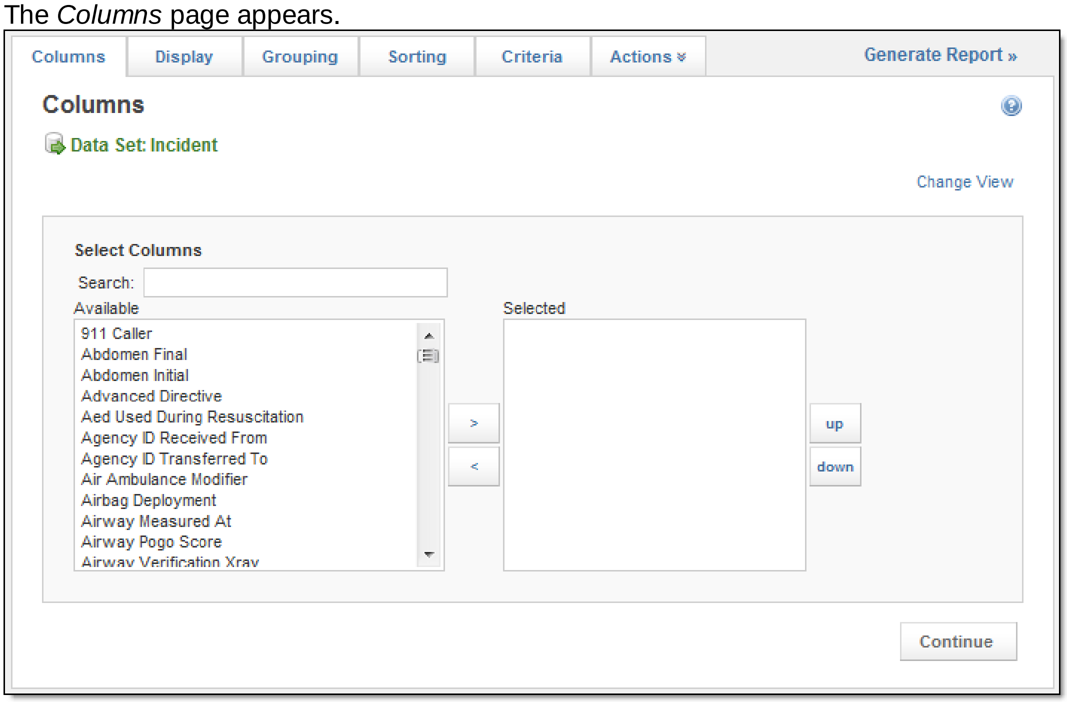
You can manage access to a report you create if desired. This can include saving the report, setting who can view or edit it, scheduling the report to run at a specific interval or exporting the report. These options are available from the *Actions* tab, as well as many other report options.

Step One: Selecting a Category

1. From the left menu, click *Create a Report*.
   The *Create a Report* page appears.

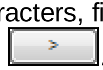


2. In the *Create a Transactional Report* section, click the desired category.
   The *Columns* page appears.



Step Two: Selecting Columns

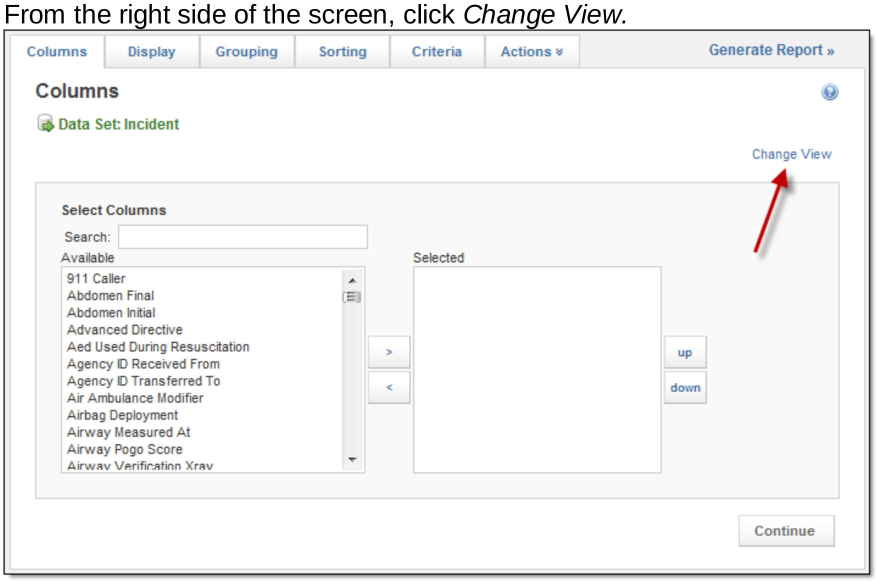
Each column represents a piece of information that will be displayed on the report. For most transactional reports, these pieces of information will be displayed in a column in a text-based report.

1. **OPTIONAL:** To locate a specific field, in the *Search* text box, begin typing the name of the field.
   As you type, the fields displayed in the *Available* scroll box will be narrowed down to display only options matching your entry.
2. From the *Available* scroll box, select the fields to be displayed on the report.
   HINTS:
   To select multiple fields, press and hold the *Ctrl* key while clicking the name of each field.
   To search for specific columns, type in the *Search* text box. After you have typed at least three characters, fields matching your entry will appear in the *Available* scroll list.
3. Click *Add* 
.
4. To change the order in which the columns appear, highlight each field to move and use the *Up* and *Down* buttons.
5. When finished, click *Continue.*

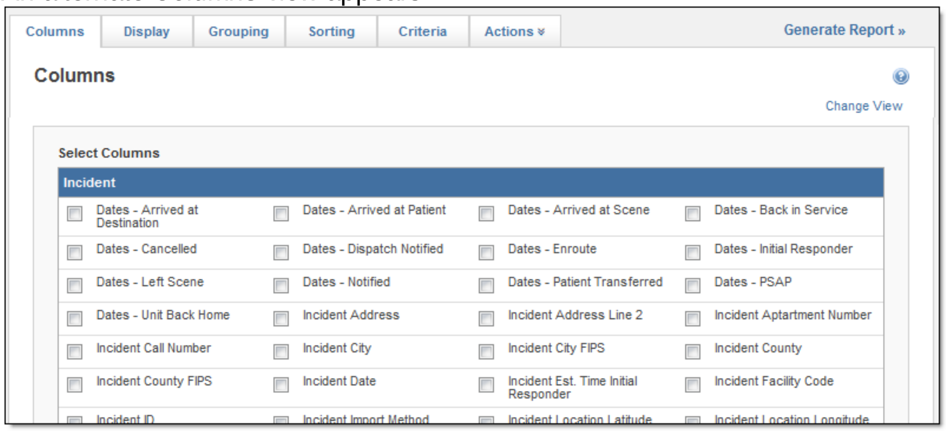
Changing the Column View (Optional)

If desired, you can select the pieces of information to be displayed from a different list of fields, sorted by the type of field. This view may be more familiar to you if you used the Report Writer in previous versions of State Bridge.

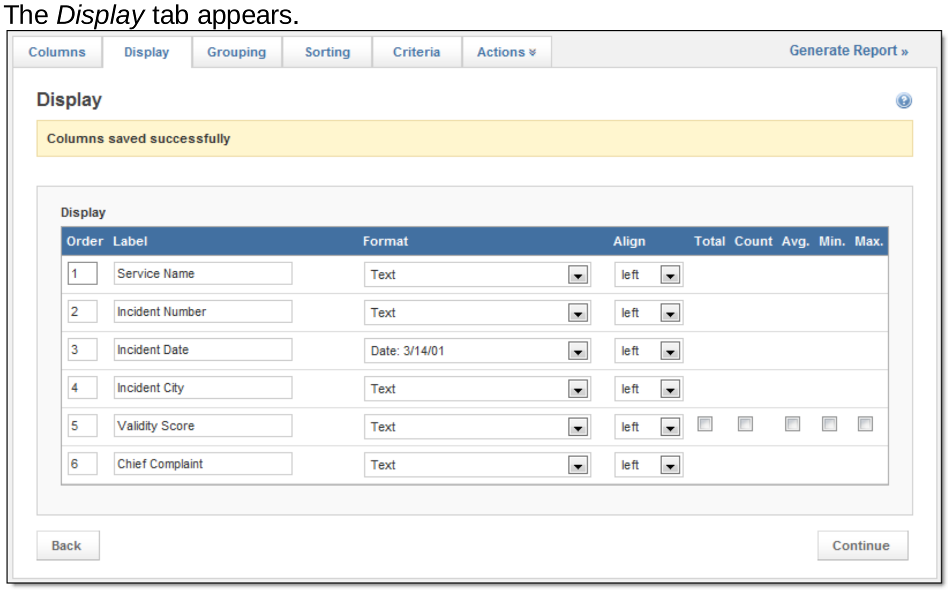
1. From the right side of the screen, click *Change View.*



An alternate *Columns* view appears.



2. Select the checkbox(es) for each piece of information to display.
3. When finished, click *Continue.*
   The *Display* tab appears.



Step Three: Setting Display Options (Optional)

If you would like to change the order of the fields or the labels, alignment or format of the information, you will need to set up display options.

1. To change the order of the fields, in the *Order* text boxes, type the numbers corresponding to the order in which the fields should appear.
   HINT: You need to change only the numbers for the fields you want moved; all other fields will be updated automatically.
2. To change the header that will appear for this information on the report, in the *Label* text boxes, type the text to appear.
3. To change the way that the data will be displayed (if possible), from the *Format* drop down menus, select the desired format.
4. To change the alignment of the information within its column on the report, from the *Alignment* drop down menus, select the desired alignment.
5. For certain numeric values, to display mathematical information (e.g., the total number of records or the average value), select the desired checkbox(es).

Min.
This will display the minimum numeric value within the grouped results.

Max.
This will display the maximum numeric value within the grouped results.

Average
This will display the mean value of the numbers in all rows within the grouping.

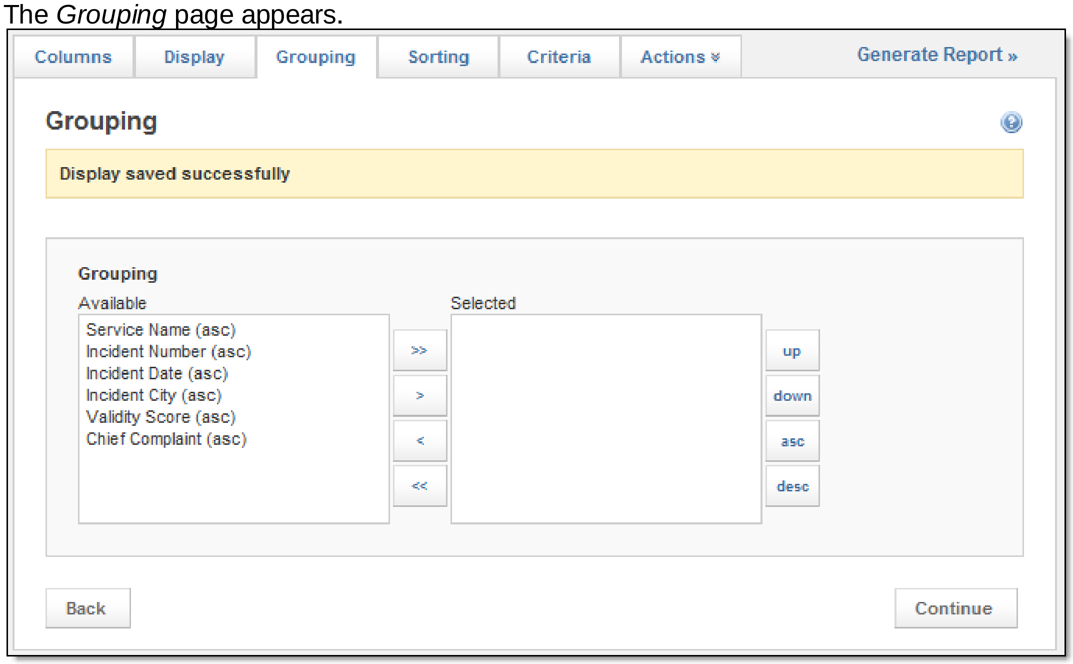
Count
This will count the total number of rows listed within the grouping.

Total
This is the *Sum* field that was in the previous Report Writer and will display the sum of the numbers in all rows within the grouping.

VAR
This will display the variance of the numbers in all rows within the grouping.

STDEV
This will display the standard deviation of the numbers in all rows within the grouping.

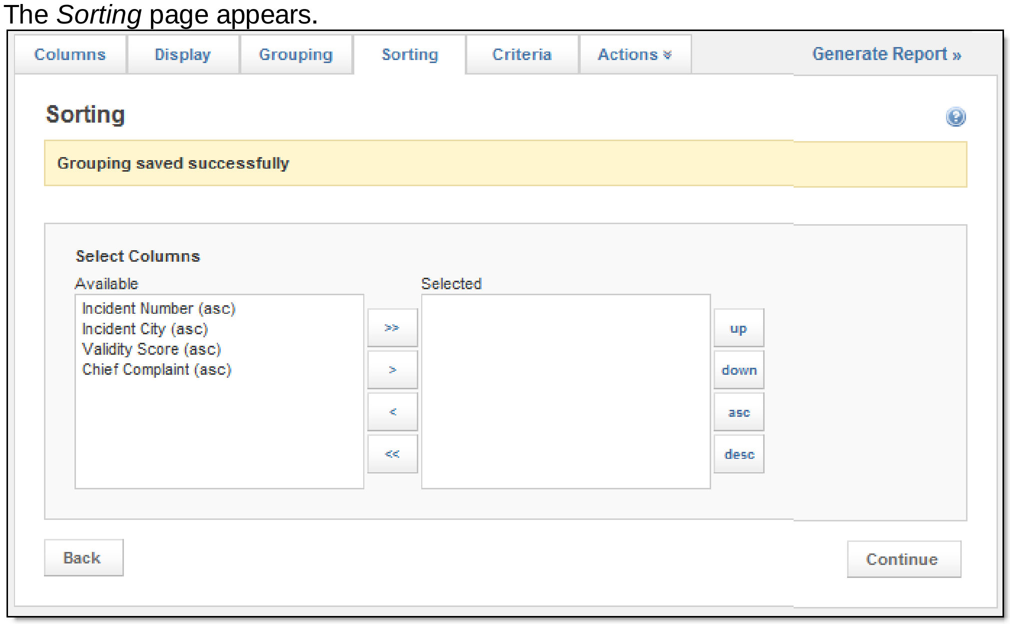
6. When all changes are made, click *Continue.*
The *Grouping* page appears.



Step Four: Setting Grouping Rules (Optional)

If you would like to place all records with similar values in a specific column together (e.g., all runs from each service listed together), you will need to set grouping rules. In addition, all calculations will be performed on groups. For instance, if you choose to display a minimum value or an average from a column, the report will display a minimum value and average for each group.

1. **OPTIONAL:** To locate a specific field, in the *Search* text box, begin typing the name of the field.
   As you type, the fields displayed in the *Available* scroll box will be narrowed down to display only options matching your entry.
2. To indicate which field to group by (e.g., if grouping all runs from each service, the *Service Name* field), from the *Available* scroll box, select the field.
3. Click *Add* .
4. If you would like to group by multiple fields, repeat steps 1–2 until all desired fields are added.
5. **OPTIONAL:** If multiple fields are selected for grouping, select the fields and use the *Up* and *Down* buttons to indicate which grouping should be done first.
   HINT: Fields that are listed first will be the primary grouping rules. Each field following will be grouped within the first field.
   EXAMPLE: If the first field groups runs by zip code, the second field could group runs by the service. Run reports would be clustered into a zip code group, inside of which they would be listed by service.
6. To select whether the groups will be listed in ascending (e.g., 1–10 or a–z) order or descending (e.g., 10–1 or z–a) order, select each group and click the *Asc* or *Desc* buttons.
7. When finished, click *Continue.*
   The *Sorting* page appears.



Step Five: Setting Sorting Rules (Optional)

If you would like to place records in a particular order (e.g., a–z, 10–1) by the values in a certain column, you may do so using sorting. When combined with grouping, sorting will be performed after all data is grouped. In this case, after being placed in each of the assigned groups, data in those groups will be sorted according to the rules set here.

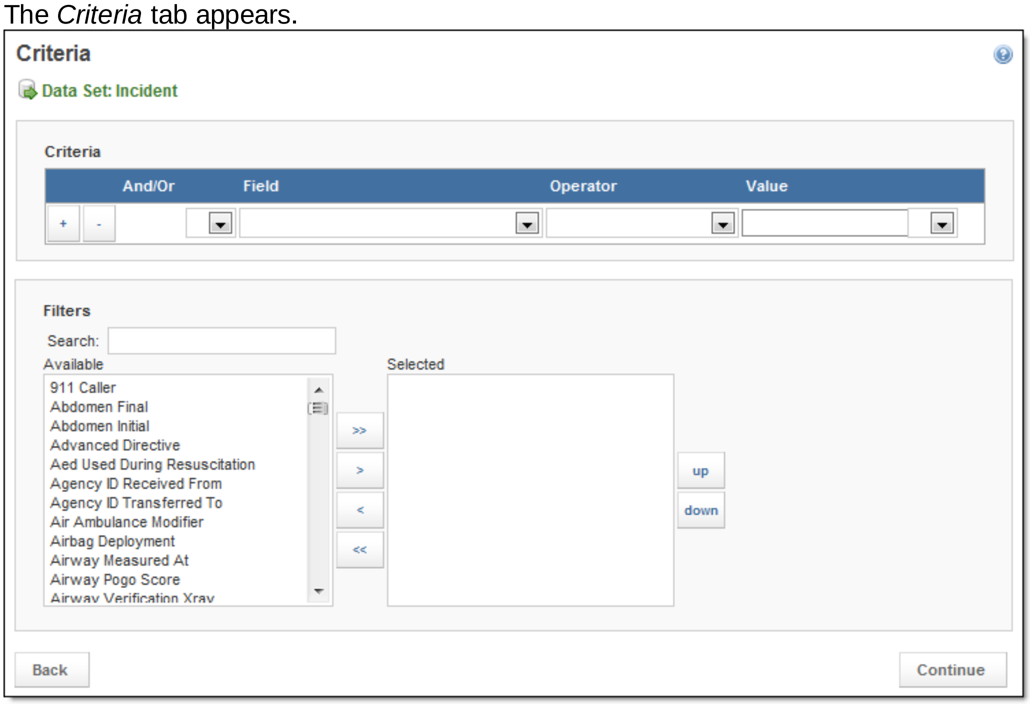
1. **OPTIONAL:** To locate a specific field, in the *Search* text box, begin typing the name of the field.
   As you type, the fields displayed in the *Available* scroll box will be narrowed down to display only options matching your entry.
2. To indicate the field with the values to sort by, select the desired field (e.g., to display incidents in order based on incident number, select *Incident Number*).

3. Click *Add* .
4. If you would like to sort by multiple fields, repeat steps 1–2 until all desired fields are added.
5. **OPTIONAL:** If multiple fields are selected for sorting, select the fields and use the *Up* and *Down* buttons to indicate which sorting should be done first.

   HINT: Fields that are listed first will be the primary sorting rules. Each field following will be sorted within the first field.

   EXAMPLE: If the first field sorts by date, the second field could sort them by incident number. In this case, all runs would be put in order based on the incident date. In cases where multiple runs took place on a single date, they would then be placed in order based on their incident number.
6. To select whether the sorting will be ascending (e.g., 1–10 or a–z) or descending (e.g., 10–1 or z–a), select each field and click the *Asc* or *Desc* buttons.
7. When finished, click *Continue.*

   The *Criteria* tab appears.



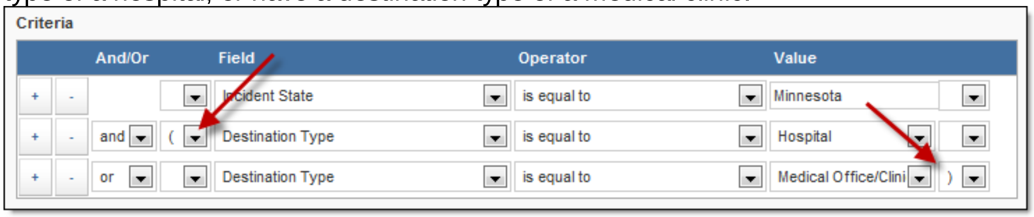
Step Six: Setting Criteria and Filters (Optional)

Criteria will allow you to determine limits on the data that will be displayed every time this report is displayed. For example, in a report that displayed only runs in Minnesota, criteria would be used to dictate that only records where the *State* field contains *Minnesota* should be included.

Criteria are important for narrowing the number of results displayed. If your organization has hundreds or thousands of records in the system, this is very important to limit the length of the report and prevent the system from timing out when trying to retrieve a large number of records.

Filters allow you to specify a new value for a criterion each time the report is run. For example, you could use filters to specify a date range, so that each time the report is run, users can select a date range for the runs.

Filters are important for narrowing the number of results displayed. If your organization has hundreds or thousands of records in the system, this is very important to limit the length of the report and prevent the system from timing out when trying to retrieve a large number of records.

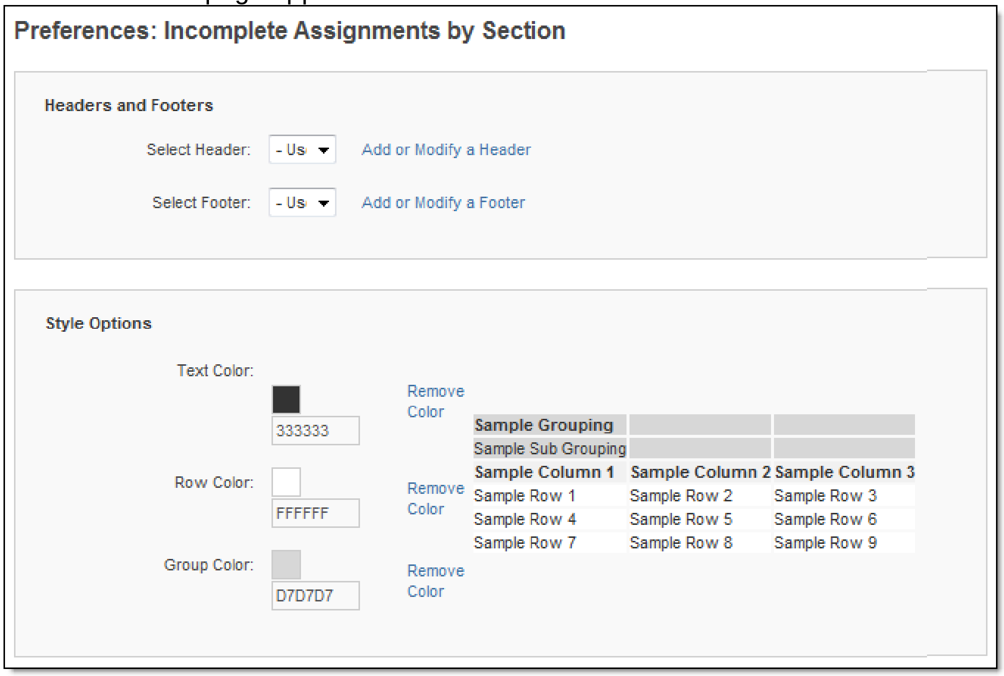
1. **OPTIONAL:** To group criteria together, use the parentheses in the second drop down menu and the last drop down menu.
   EXAMPLE: To indicate that the records included in the report should only be for runs within Minnesota with a destination of a hospital or medical clinic, you will need to group the criteria for the destination types together. This indicates to the system that the run must be from Minnesota and have a destination type of either hospital or medical clinic, rather than saying that the run must either be from Minnesota and have a destination type of a hospital, or have a destination type of a medical clinic.
   

2. From the *Field* drop down menu, select the column for which you are restricting the values.
3. From the *Operator* drop down menu, select the way in which the field value must relate to the value you are specifying (e.g., if the value should be equal to the one you are about to specify, should not be blank, or should contain the value).
4. From the *Value* drop down menu, type or select the value for the criteria.
5. If necessary, close any parentheses by selecting a closed parenthesis from the drop down menu.
   WARNING: Make sure that there are no parentheses left open when you continue; if there is an extra opening or closing parenthesis, the report will generate an error and your criteria selections will be lost.
6. To add a new criterion, click *Add* +.
   A new row appears.
7. **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 in the second drop down menu to group criteria together.
8. To add any more criteria, repeat steps 2–7.
9. To add a filter (i.e., a field for which values can be specified before running the report each time), from the *Available* scroll list in the *Filters* section, select the desired field(s).
   HINTS:
   To select multiple fields, press and hold the *Ctrl* key while clicking each desired option.
   To search for a specific field to filter by, type in the *Search* text box. After you have typed at least three characters, fields matching your entry will be displayed.
10. Click *Add* >.
11. To change the order that the filters will be listed, select the filter to move and use the *Up* and *Down* buttons.
12. When finished, click *Generate Report.*
    The *Filter Your Results* page appears.

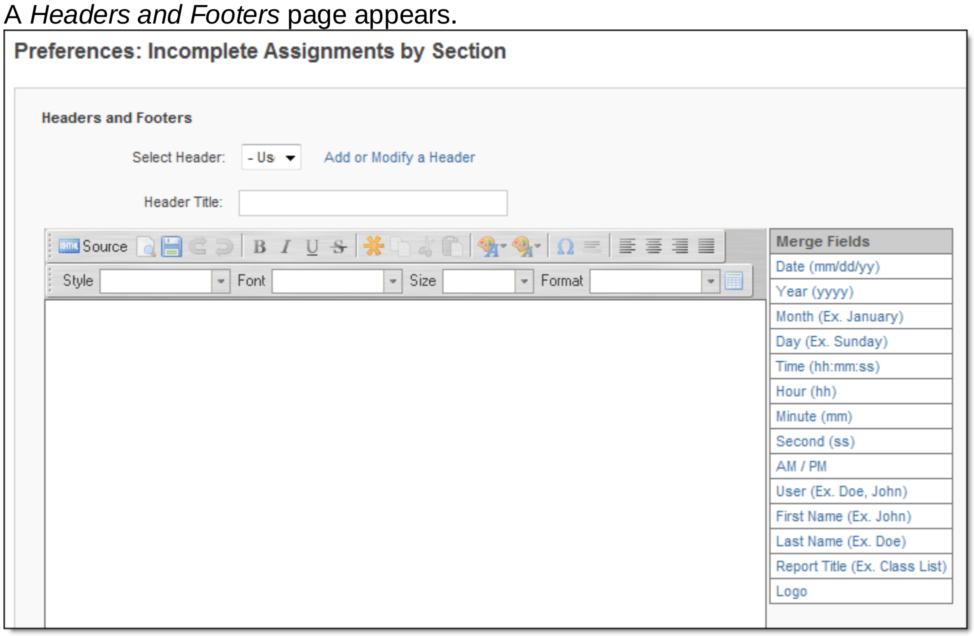
Step Seven: Changing the Appearance of the Report (Optional)

If you want to create a report with a custom look, you can change the headers and footers, as well as the colors for the text, each row, and the rows beginning each group of data.

1. From the *Actions* menu, select *Preferences.*
   The *Preferences* page appears.



2. From the *Select Header* or *Select Footer* drop down menus, select the footer you would like to display on the report.
   OR
   To create a new header or footer,
   a. Click *Add or Modify a Header* or *Add or Modify a Footer*, as appropriate.
      A *Headers and Footers* page appears.



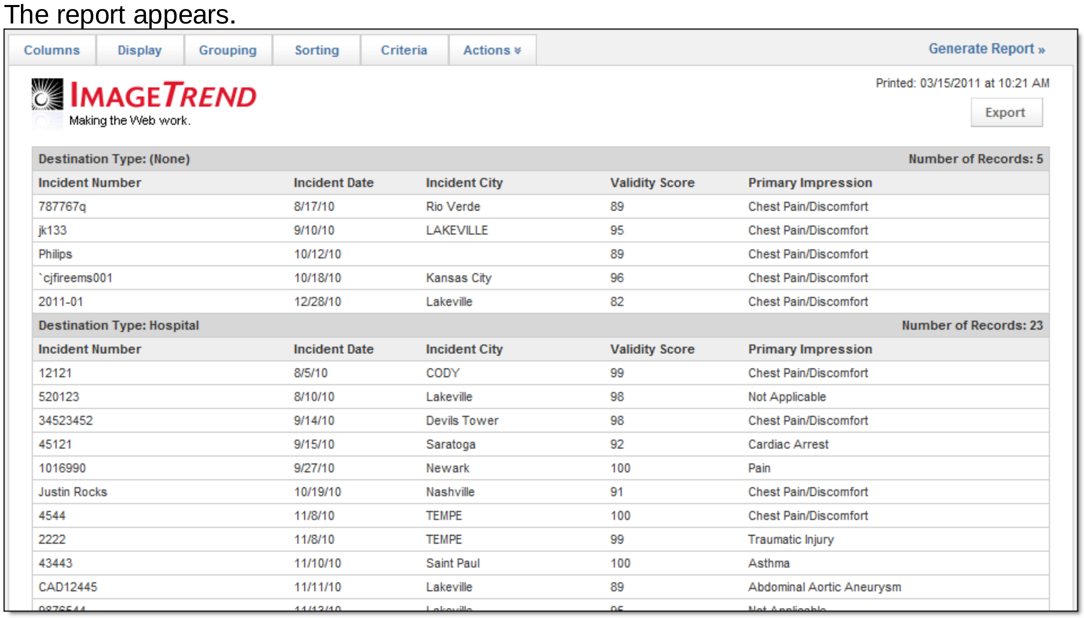
   b. In the *Header Title* text box, type a name for this header.
   c. In the text box, enter any text or pictures to be included in the header or footer.
      HINT: To enter any information that will automatically change when the report is generated, click the desired option from the *Merge Fields* section on the right.
   d. When finished, click *Save.*

3. In the *Style Options* section, select the colors that you would like to apply to the text, rows or groups.
4. When finished, from the bottom of the page, click *Save.*

Step Eight: Viewing the Report

If any filters have been added, you will need to specify the values for the filters before proceeding.

1. If necessary, from the upper right, click *Generate Report.*
2. If any filters are available, to select additional restrictions on the data to be displayed, select the desired criteria.
   HINT: Be sure to select how many records you would like to display on each page of this report. The default value will be 50 rows on each page.
3. When finished, click *Generate.*
   The report appears.



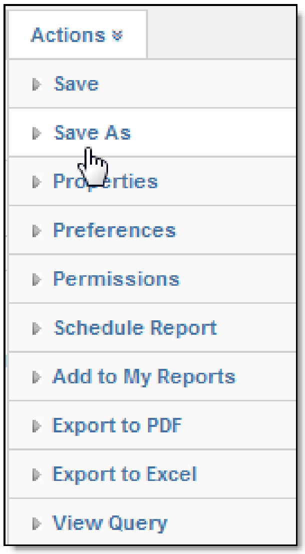
Incident Number	Incident Date	Incident City	Validity Score	Primary Impression
Destination Type: (None)				**Number of Records: 5**
787767q	8/17/10	Rio Verde	89	Chest Pain/Discomfort
jk133	9/10/10	LAKEVILLE	95	Chest Pain/Discomfort
Philips	10/12/10		89	Chest Pain/Discomfort
`cjfireems001	10/18/10	Kansas City	96	Chest Pain/Discomfort
2011-01	12/28/10	Lakeville	82	Chest Pain/Discomfort
Destination Type: Hospital				**Number of Records: 23**
Incident Number	**Incident Date**	**Incident City**	**Validity Score**	**Primary Impression**
12121	8/5/10	CODY	99	Chest Pain/Discomfort
520123	8/10/10	Lakeville	98	Not Applicable
34523452	9/14/10	Devils Tower	98	Chest Pain/Discomfort
45121	9/15/10	Saratoga	92	Cardiac Arrest
1016990	9/27/10	Newark	100	Pain
Justin Rocks	10/19/10	Nashville	91	Chest Pain/Discomfort
4544	11/8/10	TEMPE	100	Chest Pain/Discomfort
2222	11/8/10	TEMPE	99	Traumatic Injury
43443	11/10/10	Saint Paul	100	Asthma
CAD12445	11/11/10	Lakeville	89	Abdominal Aortic Aneurysm

Step Nine: Saving the Report (Optional)

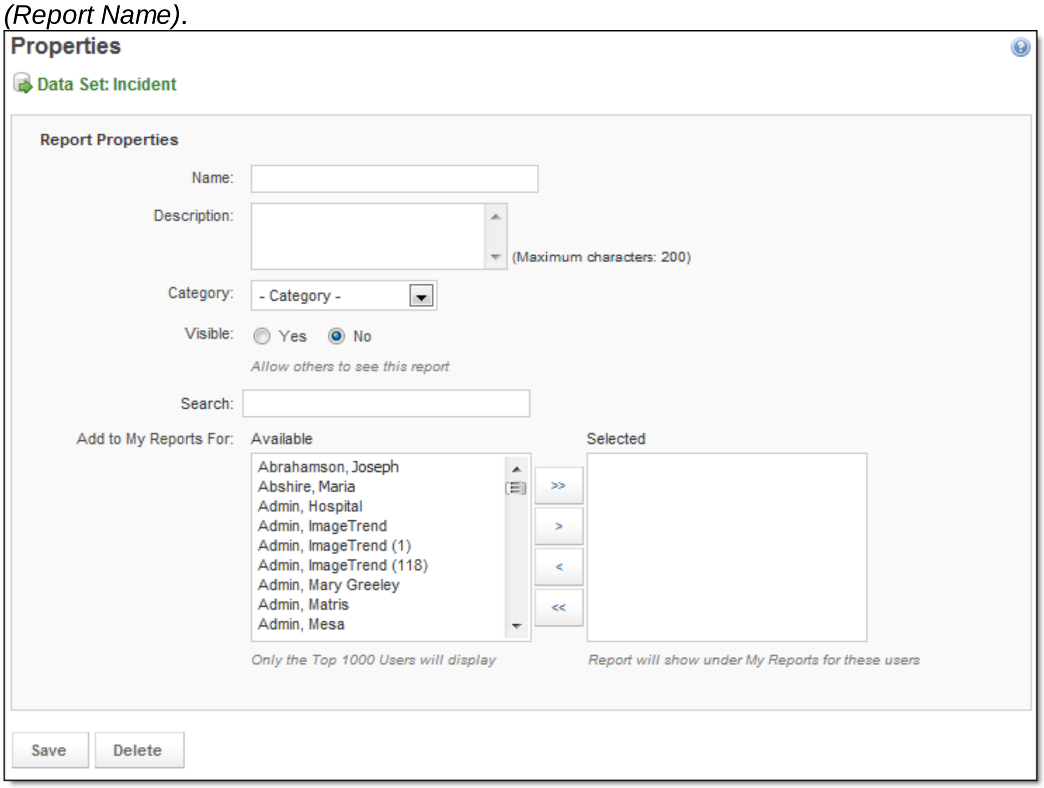
Users can save reports within the Report Writer, with the options to *Save* or *Save As. Save* will save over any report with the same title with new changes, while *Save As* allows you to save the report under a different name, preserving both versions of a report. If you are creating a new report from scratch, you should use the *Save* option so that you can specify a name for the report.

1. Within the report you wish to save, click the *Actions* tab at the top of the screen.

2. Click *Save* to save the report with the current title.
   OR
   Click *Save As* to save the report under a different title.



3. If you select *Save As,* enter a new title for the report in the *Name* field.
   HINT: If you are re-saving a report, the title will automatically be set to *Copy of (Report Name)*.



4. If desired, enter a new description.
5. Use the *Category* drop down menu to select where the report should be placed.
6. Use the radio buttons to select if the report is visible.
   NOTE: If you select *No,* only you will be able to view the report.
7. In the *Add to My Reports For* section, from the *Available* text box, select any people who should be able to view the report.

HINT: To locate specific people, type in the *Search* text box. After at least three characters have been typed, names matching your entry will appear in the *Available* scroll list.

8. Click *Add.*
9. When finished, click *Save.*
   The report is saved.

Step Ten: Deleting the Report (Optional)

While the report cannot be deleted completely from the system, you can mark it so no one, including you, can access the report.

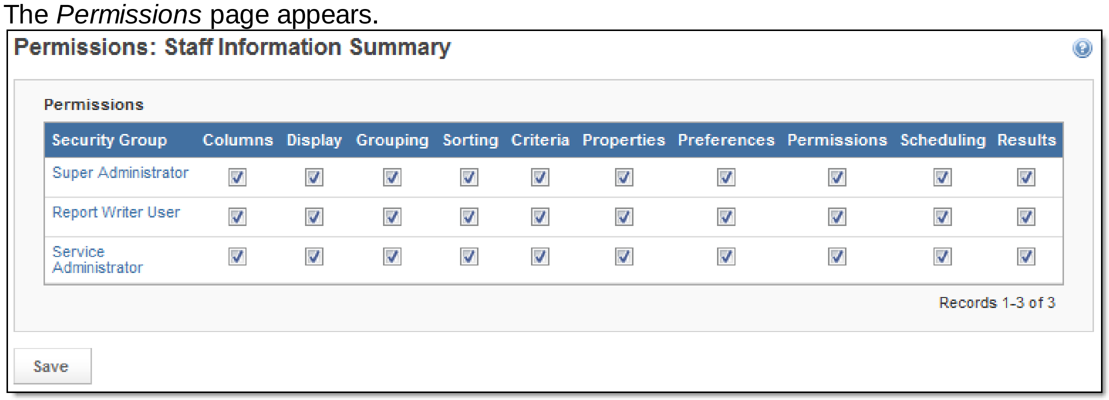
1. From the *Reports* toolbar at the top of the pane, select *Properties.*
2. In the *Visible* section, select *No.*
3. Make sure no users are in the *Selected* scroll list.

4. Click *Save.*
   The report is no longer accessible.

Step Eleven: Assigning Permissions (Optional)

You can assign permissions to the report after saving it. This allows you to set which security groups see which part of the report. Viewing permission can be restricted for parts or all of the report, depending on your preferences.

1. From the *Actions* menu, select *Permissions.*
   The *Permissions* page appears.

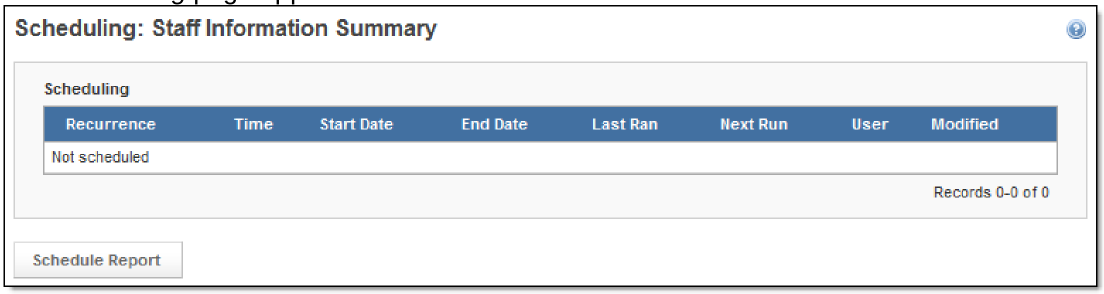


2. Use the checkboxes to select the appropriate permissions for each security group.
3. When finished, click *Save.*
   The permissions are updated.

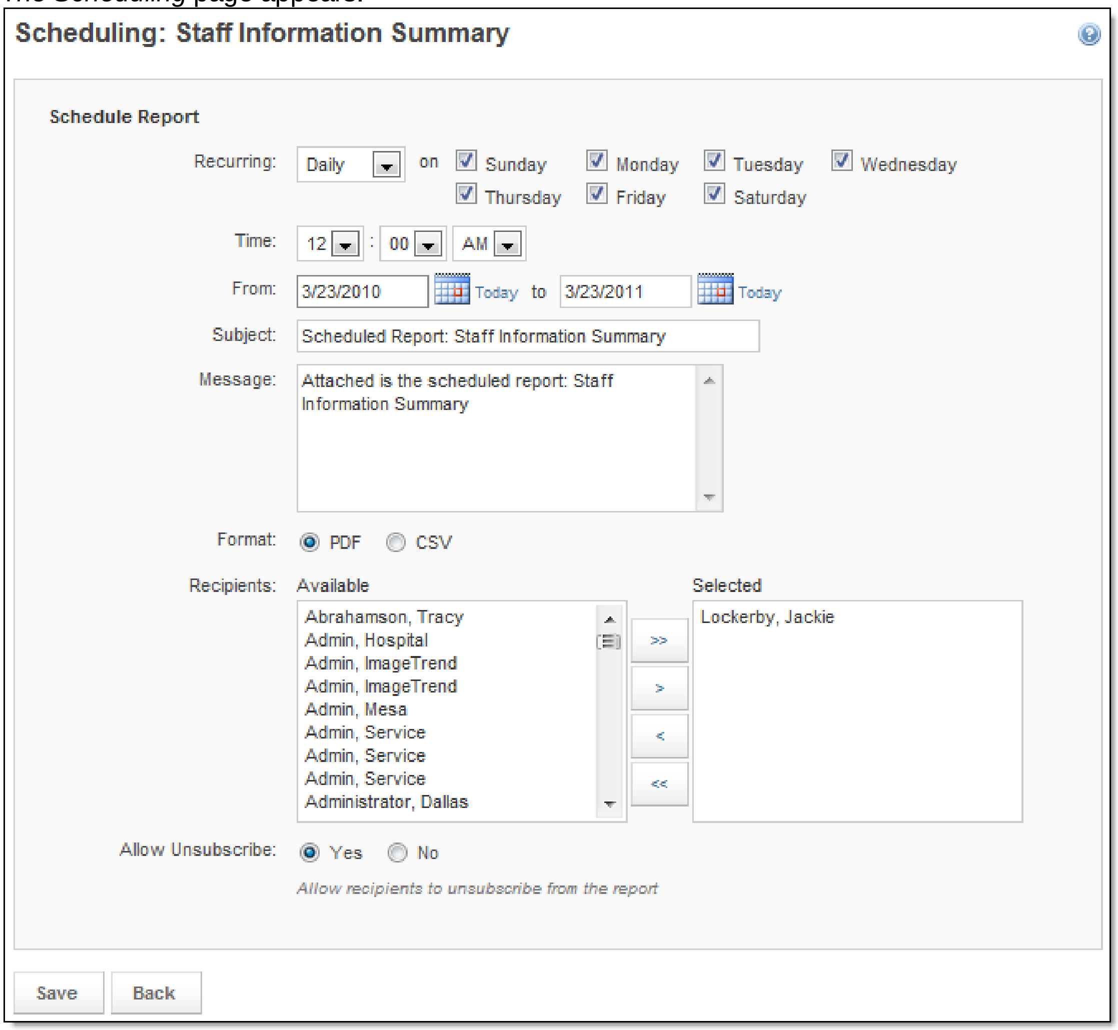
Step Twelve: Scheduling Reports (Optional)

You can schedule reports to automatically run for individuals at a certain time interval. The report will then be emailed to a person as an attachment.

1. From the *Actions* menu, select *Schedule Report.*
   The *Scheduling* page appears.



2. Click *Schedule Report.*
   The *Scheduling* page appears.



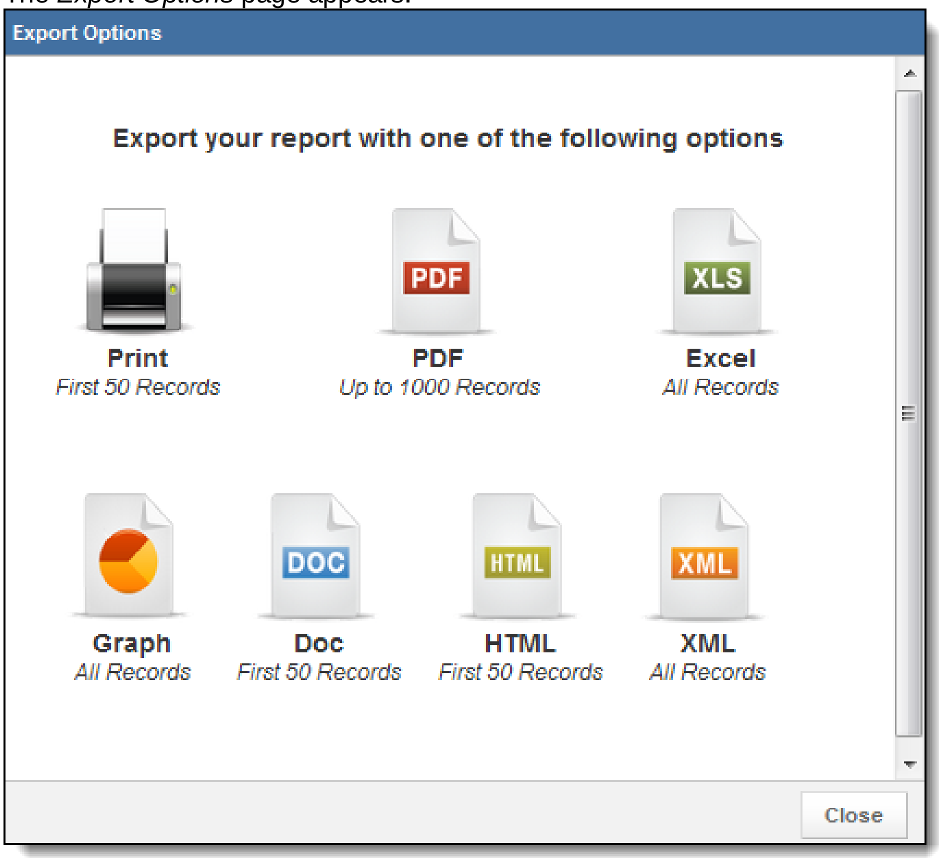
3. In the *Recurring* section, select how often this report will run.
4. In the *Time* section, select when the report will run.
   HINT: If this is a large report, you will want to run it at a time when few people will be using the system, so it will not slow down people who are working on other reports.
5. In the *From* section, type any dates that should restrict when this report will run (e.g., if the report should only be run for a month or a year).
6. In the *Subject* section, type a subject line for the email that will be sent with the report.
7. In the *Message* text box, type the message that will appear in the body of the email with the report.

8. In the *Format* section, select the format in which the report should be saved (e.g., PDF).
9. In the *Recipients* section, from the *Available* text box, select any people who should receive this report on this time schedule.
10. Click *Add.*
11. In the *Allow Unsubscribe* section, select whether these recipients should be able to set themselves to no longer receive this report.
12. When finished, click *Save.*

Step Thirteen: Exporting and Printing Reports (Optional)

You can export a copy of this report to multiple types of files. This allows you to save a copy of this report with the current data or to print the report in one of these formats. For a professional looking report, it is recommended to export the report to PDF before printing.

1. From the top right corner of the report, click *Export.*
   The *Export Options* page appears.



2. To export the report to any format, click the desired format.
   HINT: Some file types have some limitations on the abilities to export. For example, you cannot export to PDF if there are more than 1000 records in a report. Also, Microsoft Word (Doc) files and HTML pages will only export the first page of the report.
3. For file exports, select whether you would like to open or save the resulting file.

CHAPTER 11

WORKING WITH THE CERTIFICATION DASHBOARD

11.1 Chapter Overview

This chapter explains how to use the Certification Dashboard module to monitor upcoming license and certification renewals, as well as approve or disapprove training records for staff members.

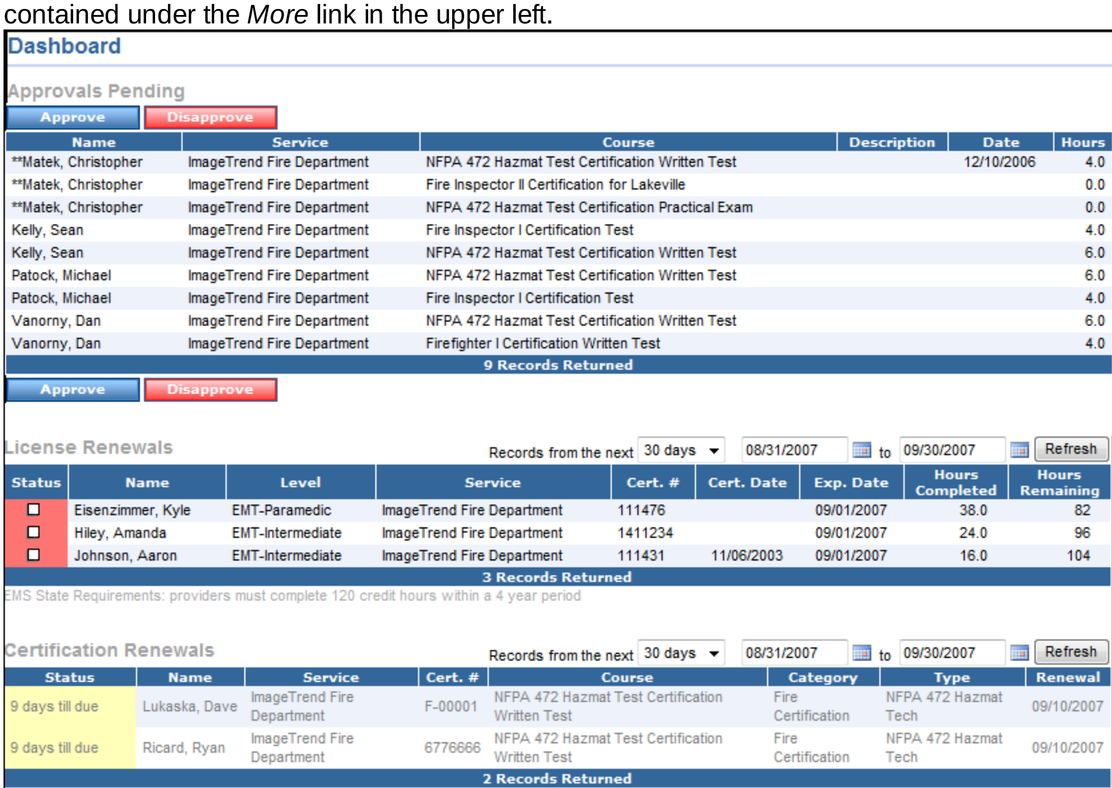
11.2 Certification Dashboard Overview

The Certification Dashboard allows administrators to track certifications, licenses and coursework for staff members. When staff profiles include dates for certifications and licenses, the Certification Dashboard will automatically display when renewals are needed. As training records are entered in the *Training* section for a service, they can be associated with individuals attending those classes. The system will automatically update the number of hours completed and needed for the renewal, and allow the administrator to approve or disapprove renewals if needed.

11.3 Viewing Upcoming Certifications

Staff can have their certification and license information stored in the system, which also keeps track of certification and license renewals that are approaching and certifications or licenses that are still waiting on final approval. If the training information for each staff member is kept complete and up-to-date, all required updates to certification and licenses will appear automatically on the Certification Dashboard.

1. From the top left, click *CE Dashboard.*
   The *Dashboard* page appears.
   NOTE: Depending on the number of modules available to you in your system, this link may be contained under the *More* link in the upper left.



Dashboard

Approvals Pending

Approve Disapprove

Name	Service	Course	Description	Date	Hours
**Matek, Christopher	ImageTrend Fire Department	NFPA 472 Hazmat Test Certification Written Test		12/10/2006	4.0
**Matek, Christopher	ImageTrend Fire Department	Fire Inspector II Certification for Lakeville			0.0
**Matek, Christopher	ImageTrend Fire Department	NFPA 472 Hazmat Test Certification Practical Exam			0.0
Kelly, Sean	ImageTrend Fire Department	Fire Inspector I Certification Test			4.0
Kelly, Sean	ImageTrend Fire Department	NFPA 472 Hazmat Test Certification Written Test			6.0
Patock, Michael	ImageTrend Fire Department	NFPA 472 Hazmat Test Certification Written Test			6.0
Patock, Michael	ImageTrend Fire Department	Fire Inspector I Certification Test			4.0
Vanorny, Dan	ImageTrend Fire Department	NFPA 472 Hazmat Test Certification Written Test			6.0
Vanorny, Dan	ImageTrend Fire Department	Firefighter I Certification Written Test			4.0
9 Records Returned					

Approve Disapprove

License Renewals

Records from the next 30 days 08/31/2007 to 09/30/2007 Refresh

Status	Name	Level	Service	Cert. #	Cert. Date	Exp. Date	Hours Completed	Hours Remaining
	Eisenzimmer, Kyle	EMT-Paramedic	ImageTrend Fire Department	111476		09/01/2007	38.0	82
	Hiley, Amanda	EMT-Intermediate	ImageTrend Fire Department	1411234		09/01/2007	24.0	96
	Johnson, Aaron	EMT-Intermediate	ImageTrend Fire Department	111431	11/06/2003	09/01/2007	16.0	104
3 Records Returned								

EMS State Requirements: providers must complete 120 credit hours within a 4 year period

Certification Renewals

Records from the next 30 days 08/31/2007 to 09/30/2007 Refresh

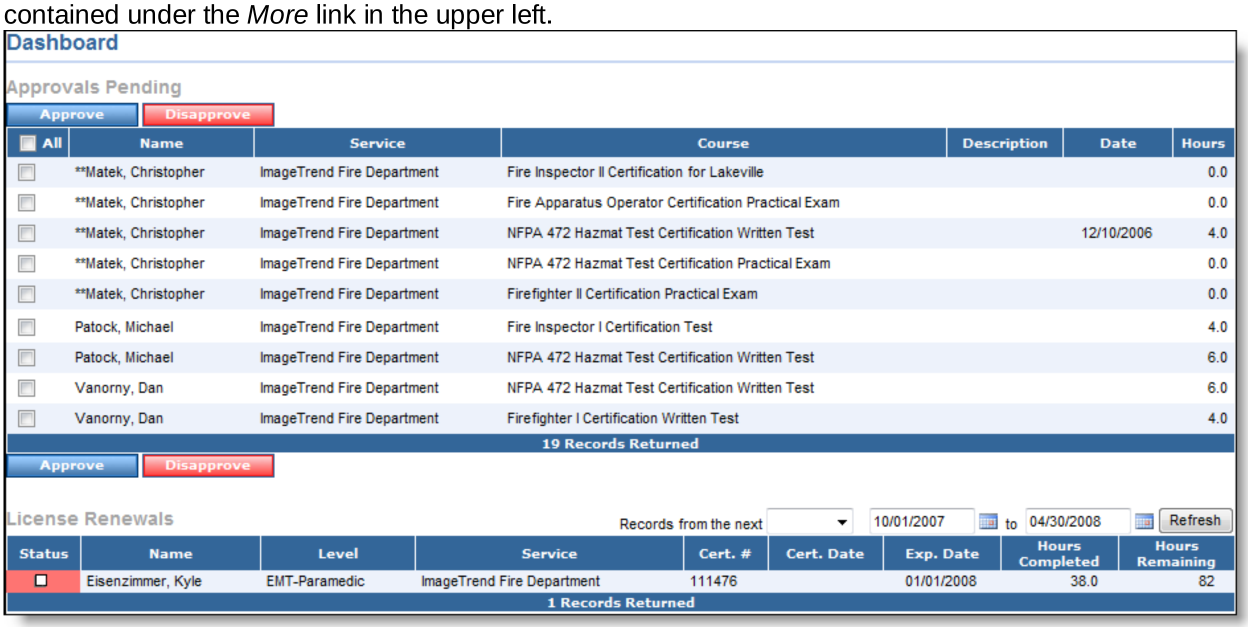
Status	Name	Service	Cert. #	Course	Category	Type	Renewal
9 days till due	Lukaska, Dave	ImageTrend Fire Department	F-00001	NFPA 472 Hazmat Test Certification Written Test	Fire Certification	NFPA 472 Hazmat Tech	09/10/2007
9 days till due	Ricard, Ryan	ImageTrend Fire Department	6776666	NFPA 472 Hazmat Test Certification Written Test	Fire Certification	NFPA 472 Hazmat Tech	09/10/2007
2 Records Returned							

2. To view renewals for a different time period, from the *License Renewals* or *Certification Renewals* section, select a time or date range and click *Refresh.*
3. If more information is available about a record, to view the additional information, click the desired record.

11.4 Approving or Disapproving Records

Administrators can approve or disapprove certain training records.

1. From the top left, click *CE Dashboard.*
   The *Dashboard* page appears.
   NOTE: Depending on the number of modules available to you in your system, this link may be contained under the *More* link in the upper left.



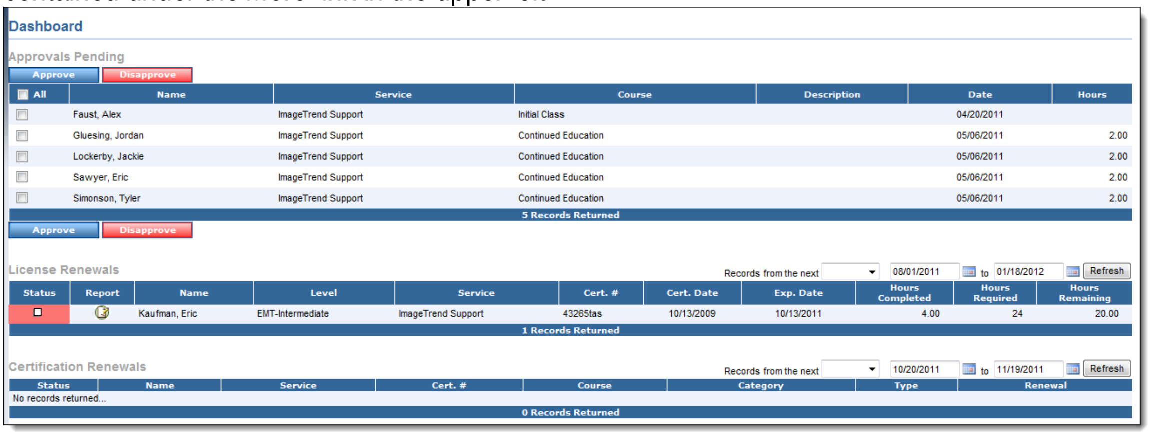
2. From the *Approvals Pending* list, select the checkboxes for all records to approve and click *Approve.*
   Staff totals for hours needed and completed update, although the window needs to be refreshed before those totals will appear in the staff member's record.
   Once you refresh the page, the total number of training hours for the affected staff members will be updated.
3. From the *Approvals Pending* list, select the checkboxes for all records to disapprove and click *Disapprove.*
   Staff totals for hours needed and completed update, although the window needs to be refreshed before those totals will appear in the staff member's record.

11.5 Viewing Training Information

You can jump to a specific training record or view a report summarizing the training completed by staff members with an upcoming renewal from the Certification Dashboard.

1. From the top left, click *CE Dashboard.*
   The *Dashboard* page appears.
   NOTE: Depending on the number of modules available to you in your system, this link may be

contained under the *More* link in the upper left.



Dashboard

Approvals Pending

Approve　Disapprove

All	Name	Service	Course	Description	Date	Hours
	Faust, Alex	ImageTrend Support	Initial Class		04/20/2011	
	Gluesing, Jordan	ImageTrend Support	Continued Education		05/06/2011	2.00
	Lockerby, Jackie	ImageTrend Support	Continued Education		05/06/2011	2.00
	Sawyer, Eric	ImageTrend Support	Continued Education		05/06/2011	2.00
	Simonson, Tyler	ImageTrend Support	Continued Education		05/06/2011	2.00

5 Records Returned

Approve　Disapprove

License Renewals　　Records from the next　08/01/2011 to 01/18/2012 Refresh

Status	Report	Name	Level	Service	Cert. #	Cert. Date	Exp. Date	Hours Completed	Hours Required	Hours Remaining
		Kaufman, Eric	EMT-Intermediate	ImageTrend Support	43265tas	10/13/2009	10/13/2011	4.00	24	20.00

1 Records Returned

Certification Renewals　　Records from the next　10/20/2011 to 11/19/2011 Refresh

Status	Name	Service	Cert. #	Course	Category	Type	Renewal
No records returned...							

0 Records Returned

2. To view a training record, click any of the text for the record.
   You are brought to the training record for the appropriate service.
   NOTE: This will bring you to the *My Service* or *EMS Services* section of the system rather than the Certification Dashboard.
3. To view a report summarizing any training hours that have been completed for a staff member with an upcoming renewal, click the associate *Report* icon .
   The report appears in a new window in PDF format.

CHAPTER 12

GLOSSARY

Glossary

Active

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

Active Protocol

An active protocol is a set of steps that can be set up for any provider impression or protocol, and will automatically bring up sections of the run form or power tools that are needed to document those steps. Active protocols can be used on the Field Bridge and, if the dynamic run form is used, on the State Bridge.

Activity

An activity is a record of a task that must be done, such as changing the oil in a vehicle.

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.

Ad Hoc Report

An ad hoc report is a report that you can create from scratch, allowing you to set your own criteria to display the exact information you need. Also called a *transactional report*.

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.

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).

Association

1) An association in a training record is other training records that have been marked as pertaining to this one (e.g., another session of the same course).

2) For users who need to access multiple services, an association links the staff profile that user has in each service and allows that user to have only one username and password.

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.

Attendee

An attendee is an individual who will be present to take a course, as recorded in training records.

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 auto call numbers can be set up by service administrators.

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.

Average

An average, as discussed for reports, is a mathematical average for the numbers selected.

Break

A break, as discussed in reports, is a space between sections of information.

55044		
Joe	Graw	MN
Danielle	Harrison	MN
Karen	Jacobson	MN
James	Kippel	MN
Chris	Matek	MN
Service	Admin	MN
Eric	Kaphingst	MN
Steven	Zimmerman	MN
Dave	Johnston	MN
55363		
Dave	Zaiman	MN
Phil	Sullivan	MN

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

A calendar displays a small image of a calendar, allowing you to locate the dates you need from a familiar calendar interface.

Change

Change rights allow you to view and edit existing information or records in the selected section, but not add or change any information.

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.

Content Rights

Content rights are set up within a user's profile by the system administrator, and determine which region and service that user can access.

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.

Correspondence

Correspondence refers to any letters or emails generated and/or sent by the system to any people whose contact information is within the system.

Correspondence Template

Correspondence templates are patterns for letters and emails that can be customized and sent out for individual pieces of correspondence. (This is also referred to as a merge template.)

Data Element

A data element is a single field or piece of information within the system; for example, the ePCR number or the cardiac arrest field. Each data element also contains all possible answers for fields with suggested answers (e.g., drop down menus or checkboxes). Data elements are extremely complicated and should not be changed without consulting ImageTrend, to avoid making changes that cannot be reversed.

Data Exchange

The data exchange is the section of the system that allows you to manage any files that you import or export through the system.

Data Set

1) A data set is a standard assemblage of information that should be collected. Many data sets are created by agencies such as NEMSIS and NFIRS.
2) A data set is a category of information that you can create a transactional report from in Report Writer.

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.

Defined Criteria

Defined criteria are used in reports, where they allow you to determine limits on the data that will be displayed every time this report is displayed. For example, in a report that displayed patients in Rice County by city, criteria would be used to dictate that only records where the county field contains the value Rice should be included.

Delete

1) Deleting something removes a record from the system. Deleting records is not recommended, as you will not be able to refer to that record again.

2) Delete rights allow a system user to view, edit, add and delete records within the section.

Descending

Descending order sorts records from the bottom up (e.g., 10–1 or z–a).

Destination

A destination indicates the location or facility that an EMS patient was transported to in the run form.

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

Document Category

Document categories are organization categories that can be used to classify documents in staff profiles.

Download

Downloading information brings selected information onto your system using an Internet 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.

Drug Database

A drug database is a separate database or application that can be accessed by earlier versions of Sate Bridge, which allows you to access a huge library of drugs that might be used and/or recorded.

Dynamic Run Form (DRF)

The dynamic run form is a type of EMS run form template that provides additional features for quick data entry.

Element details

The element details of a data element contain information about where this element is in the database structure of the application, as well as a label and description of the element.

Emergency Alert

An emergency alert is a message that will be distributed into the inboxes of all staff members in selected services.

EMS Audit Events

EMS audit events are actions within an EMS report that cause the system to record the user performing the action and/or request a reason from the user for that action.

EMS run report
An EMS run report is the report you need to fill out for any EMS calls.

Error log
The error log is a list of all errors any Field Bridges associated with your system have generated. You can submit this list to your State Bridge if necessary, and it allows ImageTrend to view the exact errors you may have received in case you need support.

Export
Exporting data is sending it to a file that can be referred to and used outside of the system.

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.

Favorite Report
A favorite report is a report that you have created in the Report Writer and saved to view again from an easily accessible list of reports.

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.

Filter
A filter is a field that allows you to view different information on a particular page or report according to your current needs (e.g., a filter at the top of a page to select how many records should appear on each page, or on the top of a report to indicate whether you want to view records for active staff, inactive staff or all staff).

First EMS Unit Arriving
This option can record the first EMS unit that arrives on the scene of any incident on EMS run forms.

Flag
A flag is an indicator you can add to messages in your inbox. You can use this to mark important messages, messages you want to save or messages that you need to respond to. Flagged messages will display a red flag icon to draw your attention.

Form
A form is a collection of questions and fields to gather information.

Group
1) A group is a collection of records with similar properties. For instance, you can create a permission group for staff members who should have the same level of access to the system.

2) Grouping within a report is clustering information based on a particular criteria to create visual "groups" within the report (e.g., grouping by zip code would gather together all records for each zip code).

ImageTrend
ImageTrend is the company that provides and supports the EMS State Bridge.

Import
Importing data allows you to copy data from a properly formatted file into the system.

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 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 List
The Incident List is a feature allowing you to easily search for past run reports.

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.

Invisible
Invisible rights prevent system users from seeing or working with the section in any way.

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.

Leave of Absence Reason
Reasons, if they are set up for your service, can document the purpose behind leaves of absence that are recorded in staff member profiles.

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.

Merge Field

A merge field is a short amount of text included within brackets, which signals to the system that it needs to fill in the information for those fields from a particular record (e.g., a staff member's first or last name).

Merge Template

Merge templates are patterns for correspondence that can be customized and sent out for individual pieces of correspondence. (This is also referred to as a correspondence template.)

Message Type

A message type is a category that can be assigned to messages sent within the inbox, to help with organization.

My View

A view that is saved as a My View will be available only for you. You can use this kind of view to view the incident and you will be able to edit it at any time, but no one else will be able to access it.

Now button

The Now button will automatically enter the current time into the corresponding field.

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 Responding Units

Other responding units are records for other units that might assist with a call, such as fire departments, police departments or utility companies.

Owner

Owner rights give the user full access to that section and all records within the section.

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 EMS State 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.

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 will be returned to the page you were previously working with.

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.

QA/QI Batch

A QA/QI batch is a set of incidents that have been assigned to specific individuals for review by a certain date and with a certain review form.

QA/QI Form

A QA/QI form is a type of form within Service Bridge that allows reviewers to answer QA/QI questions while viewing incident information in read-only mode.

QA/QI Group

A QA/QI group is a way to organize QA/QI reviewers so they can easily be assigned to batches and incidents.

QA/QI Note

A QA/QI note is a message related to quality assurance, which can be attached to a run form.

QA/QI Question

A QA/QI question is a question that can be added to QA/QI forms for reviewers to fill out when checking an incident.

QA/QI Reviewer

A QA/QI reviewer is a person who can be assigned to review run forms through the QA/QI module.

QA/QI Status

The QA/QI status for an incident reflects its progress in being reviewed by all reviewers within a specific batch.

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.

Range
A range is a series of records in a line.

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.

Read
Read rights allow a user to view information in a section, but not edit, add or delete information.

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.

Report Writer
The Report Writer is a section of the system that allows you to view and create new reports based on the information within the system.

Role
A staff member's role refers to the role he plays on a call.

Rule Error Message
The rule error message is the text that will appear to notify a user of why points were taken off if a validation rule is not met.

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 History
Run history is a section where all previous run reports that have been completed are accessed.

Run Locking
Run locking is a feature that automatically prevents run forms from being edited after a certain number of days.

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.

Scheduled Exports
A scheduled export is a system feature that will automatically export a file with set information at a particular time.

Search Report
A search report is a report that contains links to every run form listed within the report, allowing you to easily open any run form for reference.

Security Group
Security groups are groups that users can be assigned to that define their level of access to the system. Security groups control access to each major section of the system.

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 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 Views
Service views are available for the service the view is created in and can only be created or edited by individuals with service administrator-level permissions. All other users will be able to apply service views when looking at the incident list for that service but will not be able to make any changes.

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.

Sort Criteria
Sort criteria are settings for reports that determine how the records will be put into order, based on the values within each field.

Staff Profile
A staff profile is a record for an individual staff member in your state. 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 Report
A standard report is a report that has been pre-created in the system and can be viewed from the Report Writer at any time.

Standard Run Form
The standard run form is the traditional EMS run form, which does not require any additional plugins to use.

Station
A station within the system is a record for any stations within your organization. When you create station records, you can note which station was responsible for a particular incident.

Statistical Year
A statistical year is the year for which you want to run statistics (e.g., if you want to calculate statistics for the fiscal year, you can set up the year from July to July).

Status
A status is the condition of a particular record (e.g., active or inactive for users, in progress or submitted for run forms).

Sum
Displaying a sum within a report will show the product of adding all values.

Sync
Syncing, or synchronizing, is the process of passing all information set up on the Web-based system to all Field Bridge systems, Fire Inspections Client systems or other field data collection systems that are connected with the State Bridge. This ensures that all data is up to date in the field systems.

Synchronize
Synchronizing, or syncing, is the process of passing all information set up on the Web-based system to all Field Bridge systems, Fire Inspections Client systems or other field data collection systems that are connected with the State Bridge. This ensures that all data is up to date in the field systems.

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.

Tag
A tag is the name of an individual field that can be included on a run form, as set up in the dynamic run form.

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.

Training Record
A training record is a record for a particular course that is being used to educate staff.

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 Defined Exports
User defined exports is a section that set up which exports a user can have access to.

Username
A username is the name the system uses to identify you when you try to log in to the system.

Value
As used in this manual, a value is any text, number or selection that should be entered into a field.

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.

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.

Widget

A widget is an on-screen tool that can be displayed on the home page of the Field Bridge to give you quick access to information.

XML

XML is a type of file creating using the XML markup language. Rescue Bridge uses XML files for importing and exporting information, as well as for determining how to create PDF files.

XSLT

A stylesheet used to create PDF versions of forms.

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 13

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 State 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