EMS STATE BRIDGE

VERSION 5.1

STATE ADMINISTRATOR GUIDE

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CHAPTER 1

INTRODUCTION TO 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

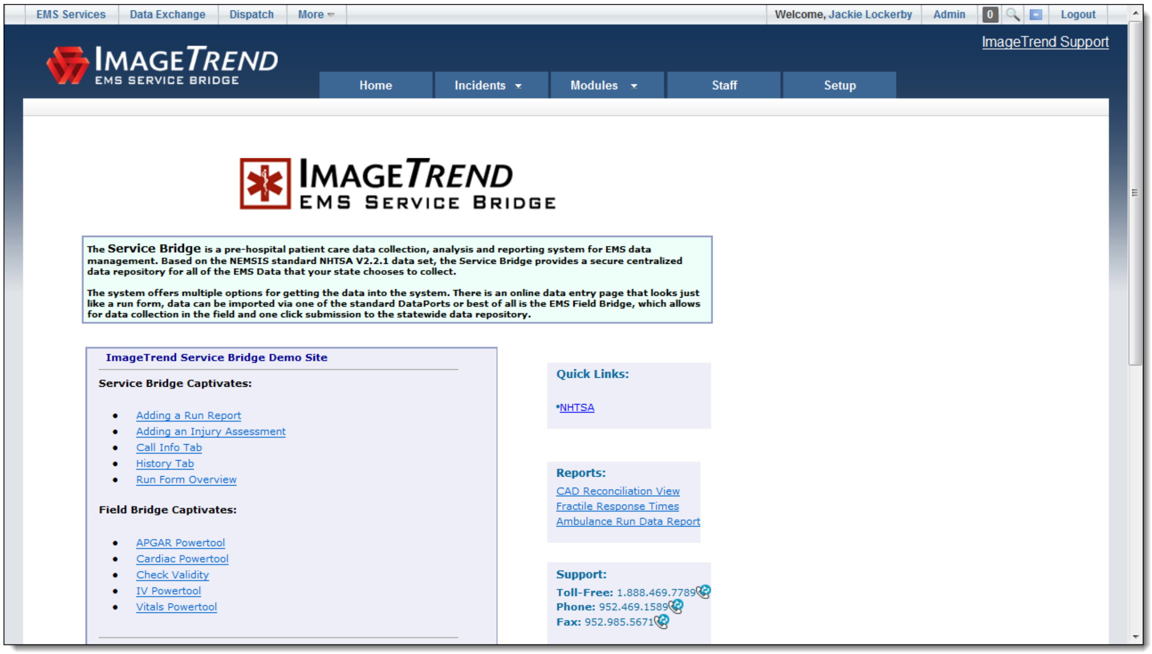
64-bit software is recommended.
Microsoft SQL Server 2005
Microsoft SQL Server 2008
Microsoft SQL Server 2008 R2 (recommended)

Internet Browser Requirements for End Users

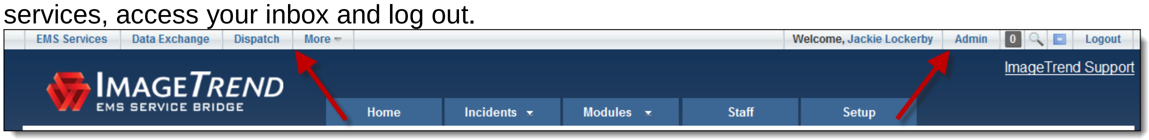
Microsoft Internet Explorer 7.0 and above
Other browsers that support Mozilla 4.0 and above
Adobe Flash 8 or higher (recommended)
Adobe Reader 8 or higher (recommended)
Silverlight 4

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.

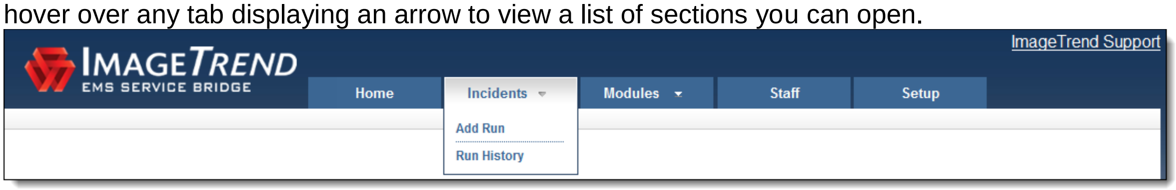


The links in the top left will bring you between modules and will display the same options no matter what the user is doing with the State Bridge. Additional links may be available depending on which modules you have access to. If you have access to many different modules, some of them may be included 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* provides access to standard, search, ad hoc and multi-dimensional reporting formats.
- *Report Writer 2.0* provides access to the new Report Writer for working with standard, search, ad hoc and multi-dimensional reporting.
- *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 *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.

- *Home* brings you to the 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.

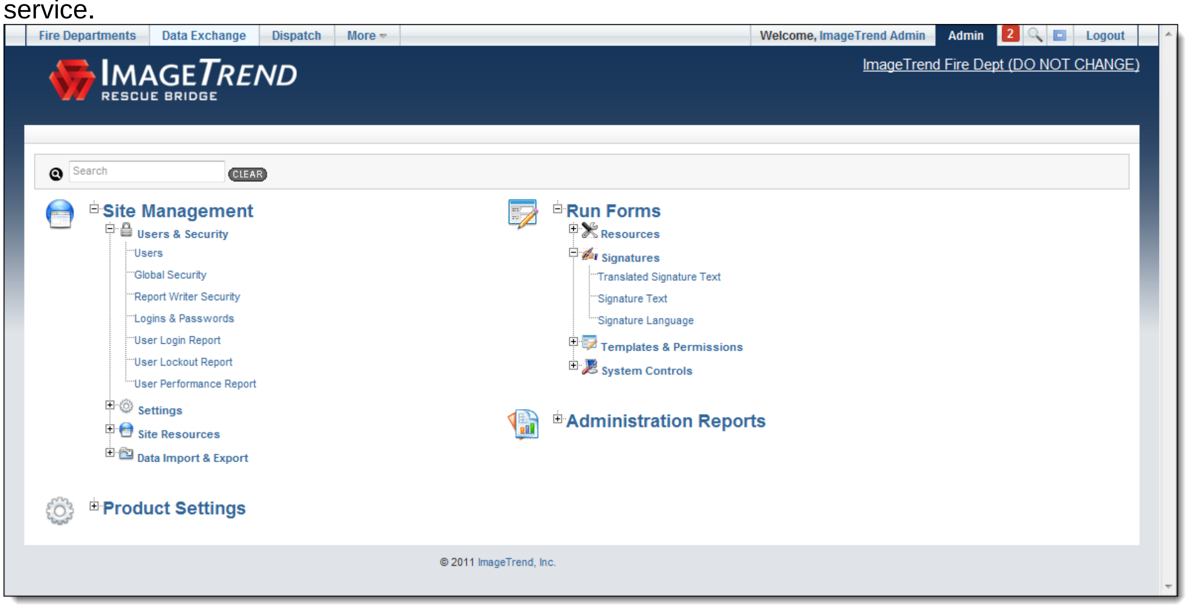
To return to the home page for this service at any time, from the top toolbar, click *My Service* or, if available, the *Home* tab.

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.

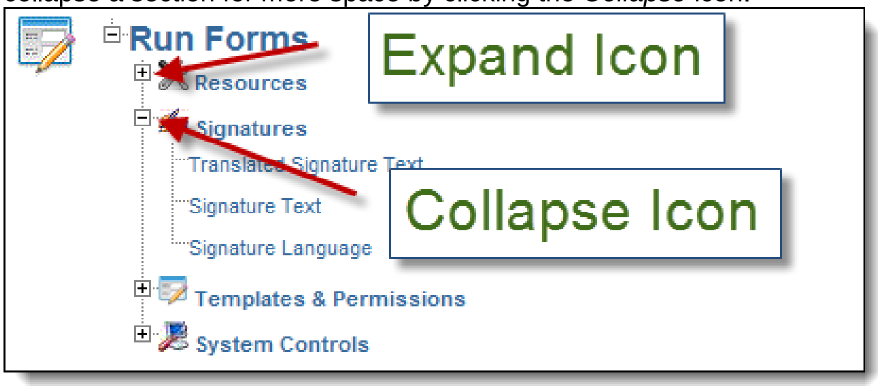
The logged-in user's name will appear in the upper right corner of the screen. If this link is clicked, the user's profile will open for editing. Use the provided fields to enter or change information, and the tabs at the top of the screen to navigate through the profile.

The Admin Section

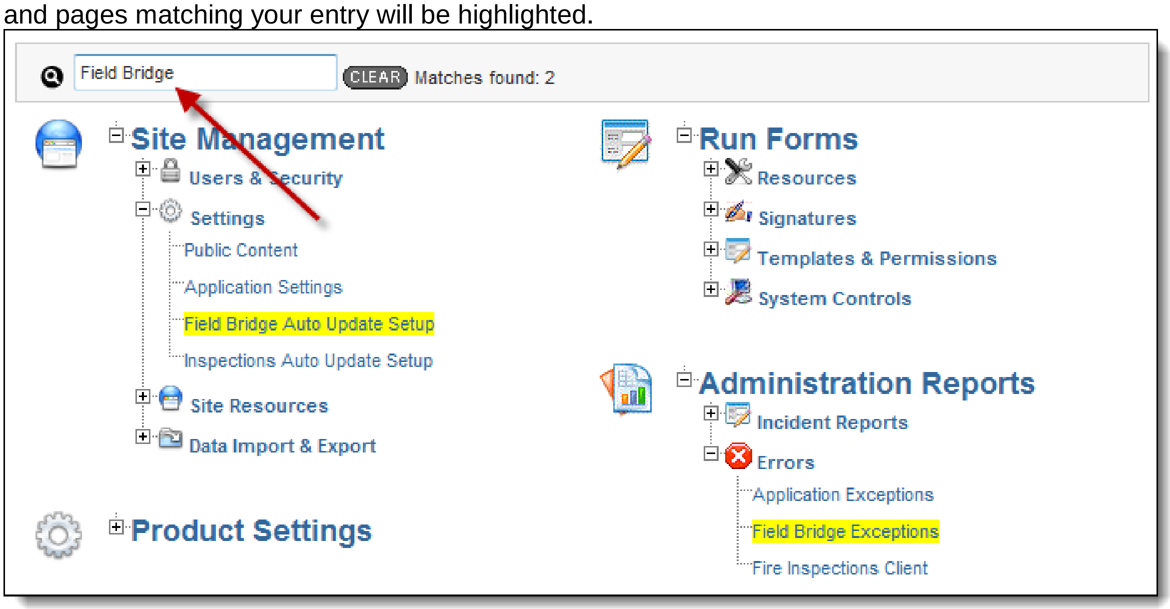
As a state administrator, much of your work and the content in this guide deal with the *Admin* section. Settings and changes in the *Admin* section are applied to every service and region in your system. Navigation in the *Admin* section is somewhat different from navigation in a specific service.



All administrative pages and options are grouped underneath two levels of headers for organization. You can open any section by clicking the *Expand* icon to the left of the text, or collapse a section for more space by clicking the *Collapse* icon.



If you don't know exactly where the option you are looking for is, you can type part of the name of the page in the *Search* box. As you type, any group containing a page with your entry will open and pages matching your entry will be highlighted.



Once you open a page, all the options will be displayed in the left menu. Sections in the left menu can also be expanded or collapsed by clicking on the name of that section. If you want to return to the main *Admin* page at any time, click *Admin* in the upper right.

1.5 Record Keeping

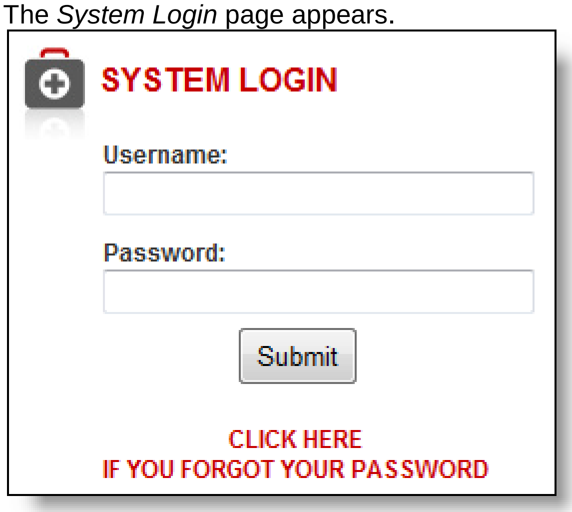
The State Bridge system allows administrators to delete most information that has been added to the system. However, deleting information is strongly discouraged except in the case of test or training information, as deleted profiles or records can result in finished records becoming incomplete. Once 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.

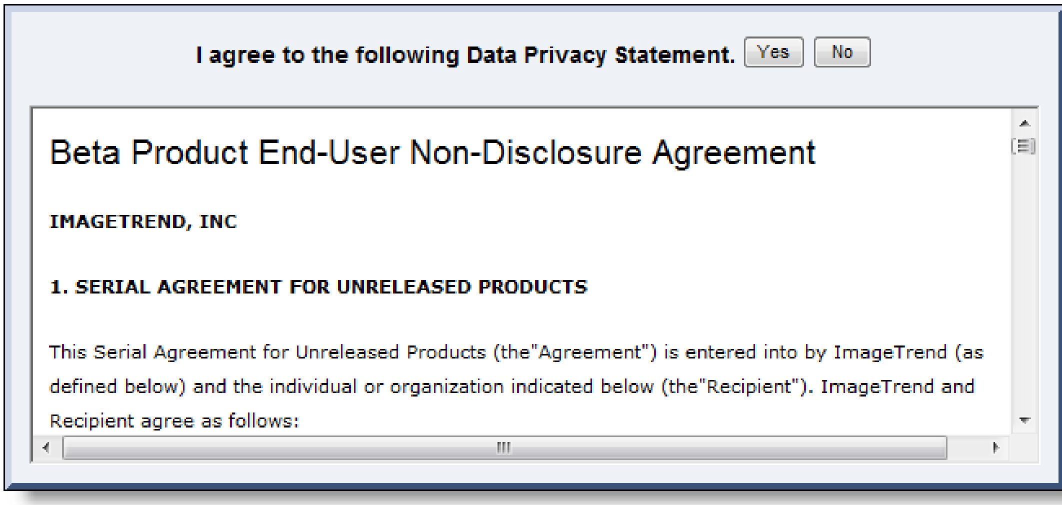
1. Using a Web browser, navigate to the URL for the service's State Bridge system.
   The *System Login* page appears.



2. In the *Username* field, type your username.
3. In the *Password* field, type your password.
4. Click *Submit* or press *Enter.*

Data Privacy Agreement

Once logged in, all users are required to read and agree to the terms of the Data Privacy Statement regarding all data related to services, users and patients on the site. Agreeing to the terms automatically creates a user history and audit trail of site access to comply with HIPAA requirements.



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.

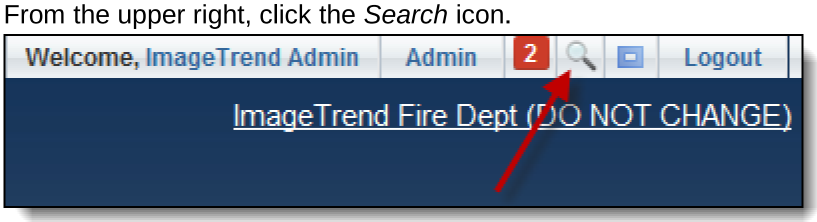
1.7 Selecting an Agency

When you initially log in, you will be brought to the *Home* tab for the your default agency or (if you have no default agency) that 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.

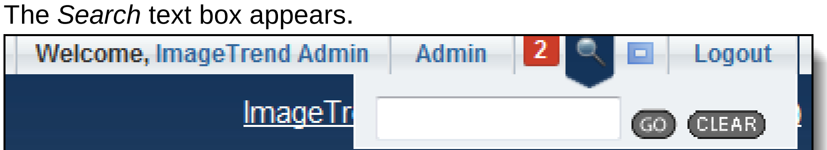
Searching for an Agency

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.

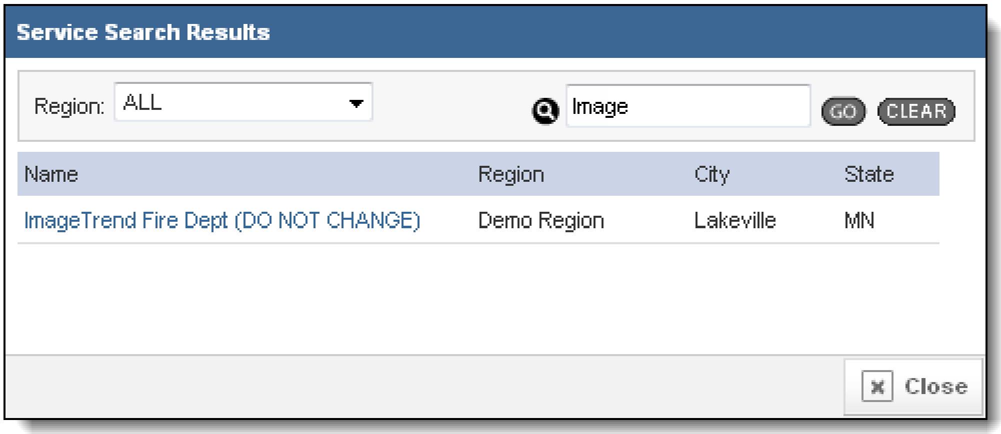


The *Search* text box appears.



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.

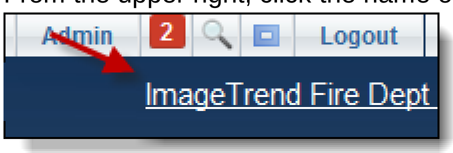


4. Click the name of the service.
   The *Home* tab for that service appears.

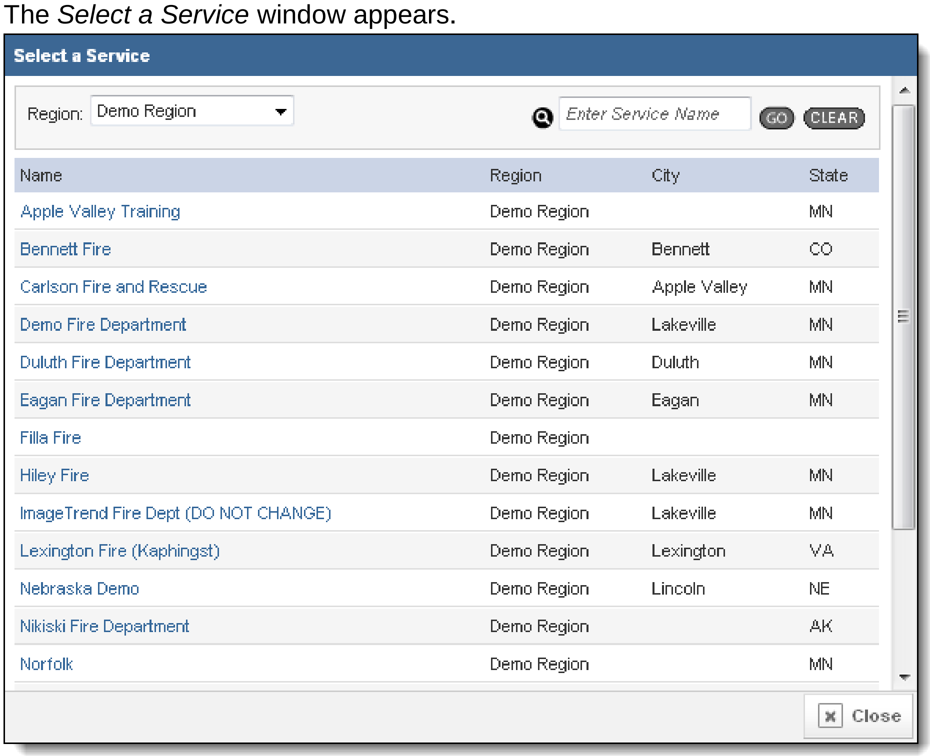
Browsing for an Agency

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 *Home* tab for that service is displayed.

CHAPTER 2

COMMUNICATING USING THE STATE BRIDGE

2.1 Chapter Overview

The State Bridge provides several ways to communicate with both people within the service and from the public. This chapter explains how to send and receive messages using the State Bridge inbox and how to post messages on the home page of the State Bridge for system users.

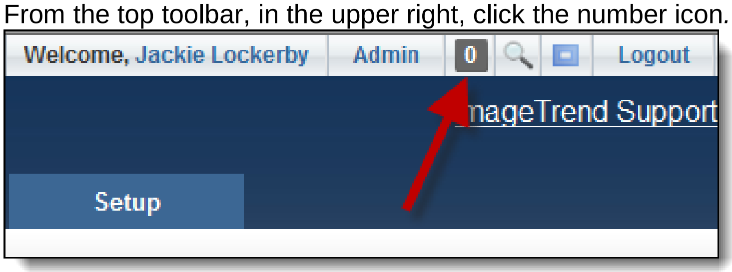
2.2 Working with Messages

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

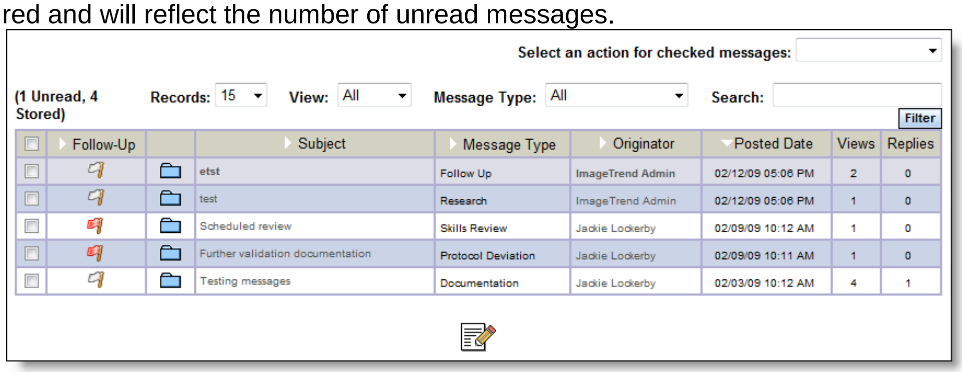
The inbox is how users obtain, respond and write messages pertaining to specific incidents or to communicate with other members of the service, medical direction or other system users. Message status is maintained within the system to verify when messages are sent, replied to and read. Messages can be 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.



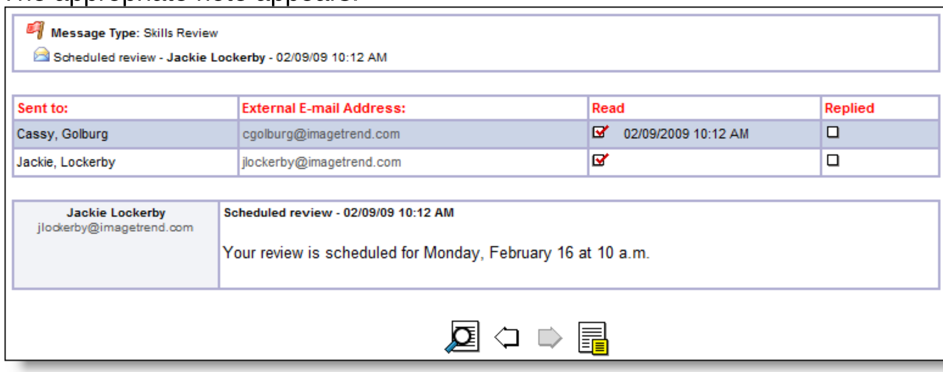
The *Inbox* page appears.

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

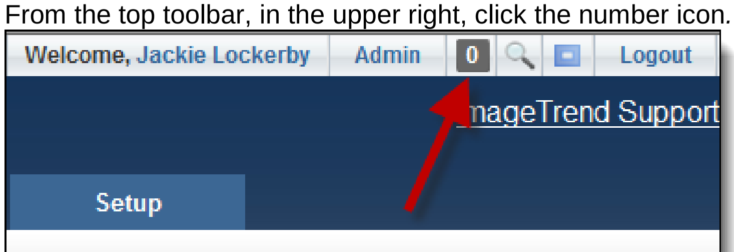
To share additional information with the sender of a note, users can use the inbox to reply to notes that they have received.

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. 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

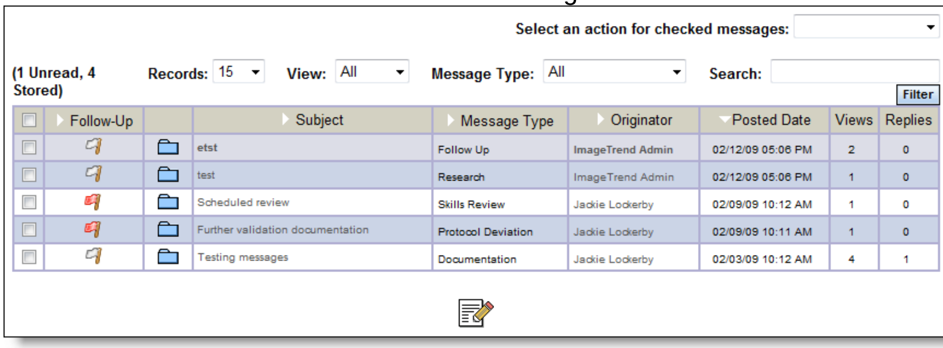
Users can send new notes to other system users.

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

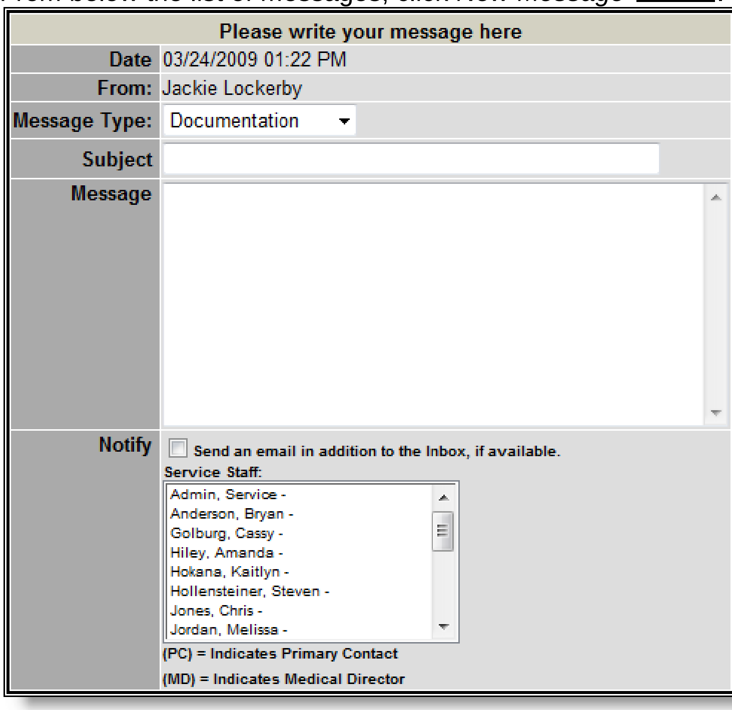


The *Inbox* page appears.
NOTE: If you have unread messages in your inbox, this number will be displayed in

red and will reflect the number of unread messages.



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



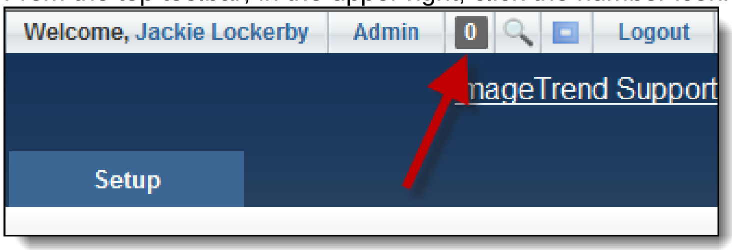
3. From the *Message Type* drop down menu, select the desired category for this message.
4. In the *Subject* text box, type a title for the note.
5. In the *Message* text field, type the note.
6. In the *Notify* scroll box, select the names of all staff to receive the note.

   HINT: To select more than one person, press and hold *Ctrl* while clicking each name.
7. 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

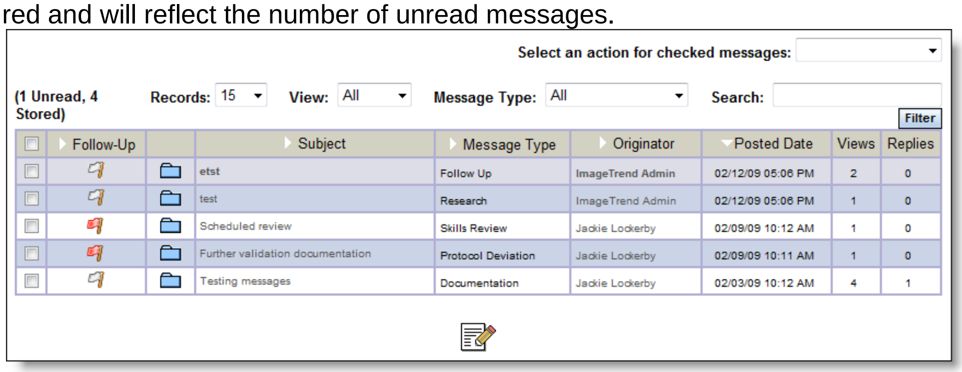
You can flag messages to remind yourself to follow up, if needed. Messages with white flags are not flagged for follow up; messages with red flags are.

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.

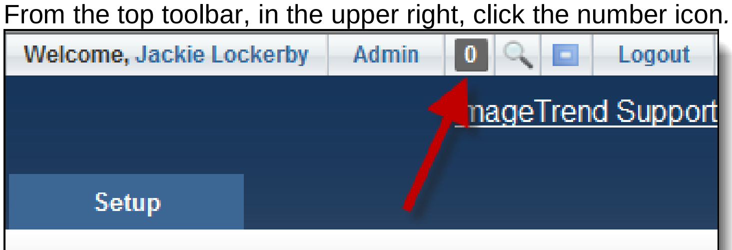


2. To flag a single message, in the *Follow-Up* column, click the *Flag* icon for the message you want to flag.
3. To flag multiple messages,
   a. Select the checkbox for each message to flag.
   b. From the *Select an action for checked messages* drop down menu, select *Flag for Follow Up.*
4. To clear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

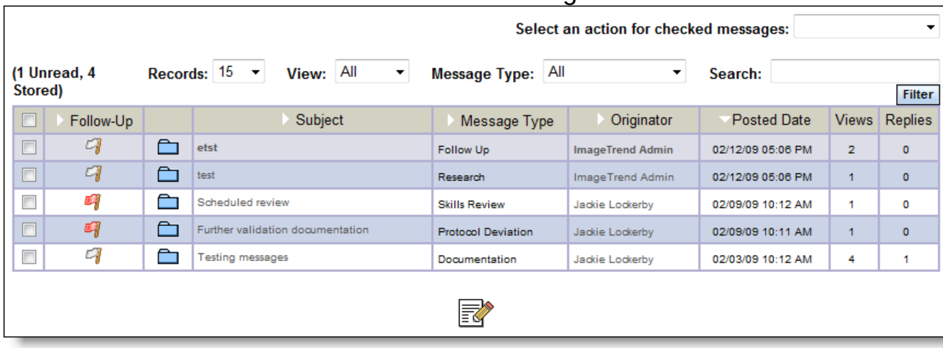
System users can delete messages that they no longer need from their inbox. You can delete single or multiple messages.

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.*

CHAPTER 3

WORKING WITH SYSTEM ACCESS

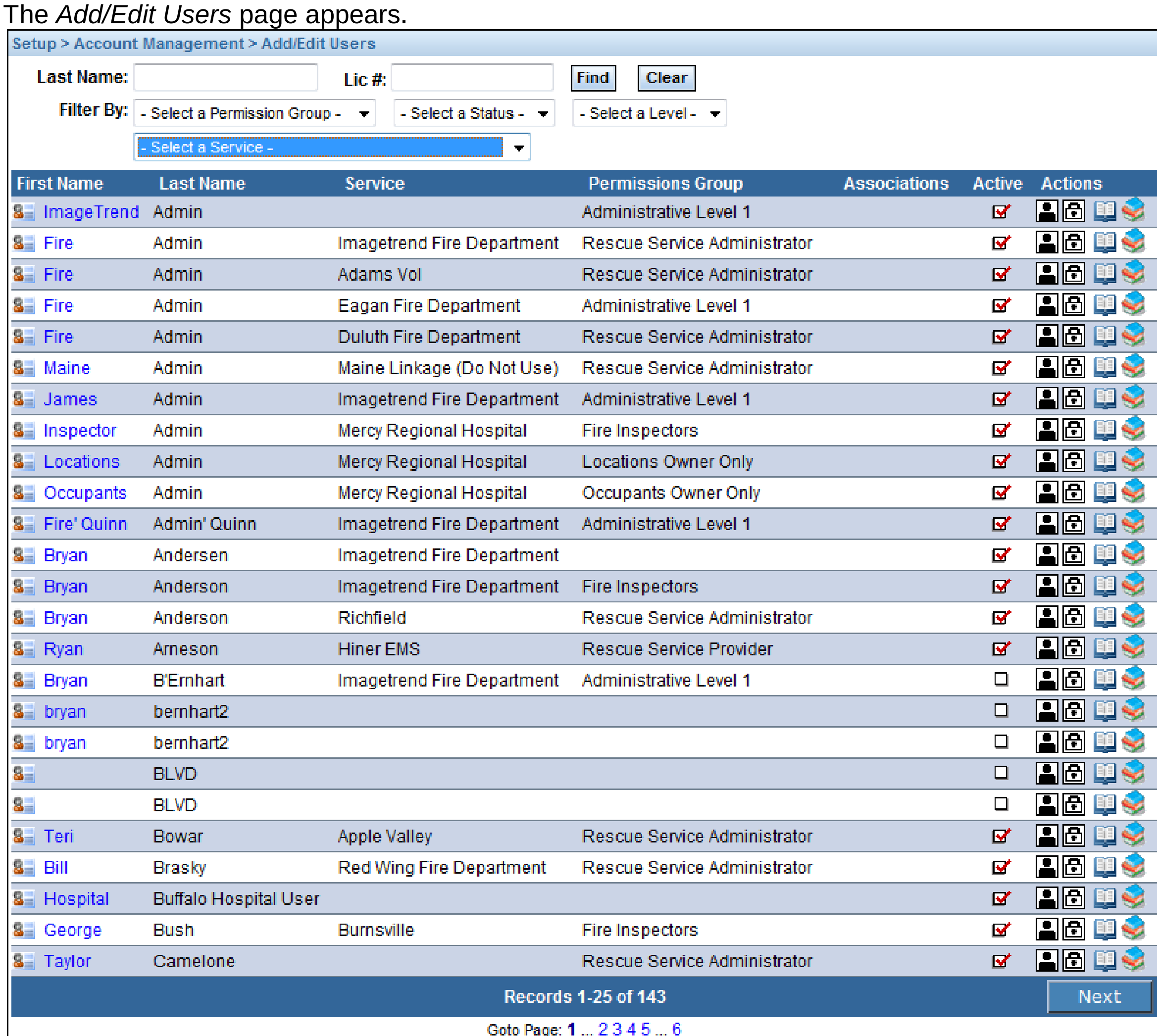
3.1 Chapter Overview

Using the *Account Management* section of the *Administration* page, system administrators can work with user profiles, permission groups and login requirements.

3.2 Working with System Users

System administrators can add, edit, view or delete users' profiles. This includes the ability to set up a user's level of access to the system and to the pages for individual hospitals or facilities. All user profiles that are in the system will be displayed here, whether they were created in the *Admin* section or from a service.

1. From the top right, click *Admin.*
2. Under *Site Management,* click *Users & Security.*
   A sub-menu appears.
3. Under *Users and Security,* click Users.
   The *Add/Edit Users* page appears.


Setup > Account Management > Add/Edit Users

Last Name: Lic #: Find Clear
Filter By: - Select a Permission Group - | - Select a Status - | - Select a Level -
- Select a Service -

First Name	Last Name	Service	Permissions Group	Associations	Active	Actions
ImageTrend	Admin		Administrative Level 1		☑	
Fire	Admin	Imagetrend Fire Department	Rescue Service Administrator		☑	
Fire	Admin	Adams Vol	Rescue Service Administrator		☑	
Fire	Admin	Eagan Fire Department	Administrative Level 1		☑	
Fire	Admin	Duluth Fire Department	Rescue Service Administrator		☑	
Maine	Admin	Maine Linkage (Do Not Use)	Rescue Service Administrator		☑	
James	Admin	Imagetrend Fire Department	Administrative Level 1		☑	
Inspector	Admin	Mercy Regional Hospital	Fire Inspectors		☑	
Locations	Admin	Mercy Regional Hospital	Locations Owner Only		☑	
Occupants	Admin	Mercy Regional Hospital	Occupants Owner Only		☑	
Fire' Quinn	Admin' Quinn	Imagetrend Fire Department	Administrative Level 1		☑	
Bryan	Andersen	Imagetrend Fire Department			☑	
Bryan	Anderson	Imagetrend Fire Department	Fire Inspectors		☑	
Bryan	Anderson	Richfield	Rescue Service Administrator		☑	
Ryan	Arneson	Hiner EMS	Rescue Service Provider		☑	
Bryan	B'Ernhart	Imagetrend Fire Department	Administrative Level 1		☐	
bryan	bernhart2				☐	
bryan	bernhart2				☐	
	BLVD				☐	
	BLVD				☐	
Teri	Bowar	Apple Valley	Rescue Service Administrator		☑	
Bill	Brasky	Red Wing Fire Department	Rescue Service Administrator		☑	
Hospital	Buffalo Hospital User				☑	
George	Bush	Burnsville	Fire Inspectors		☑	
Taylor	Camelone		Rescue Service Administrator		☑	

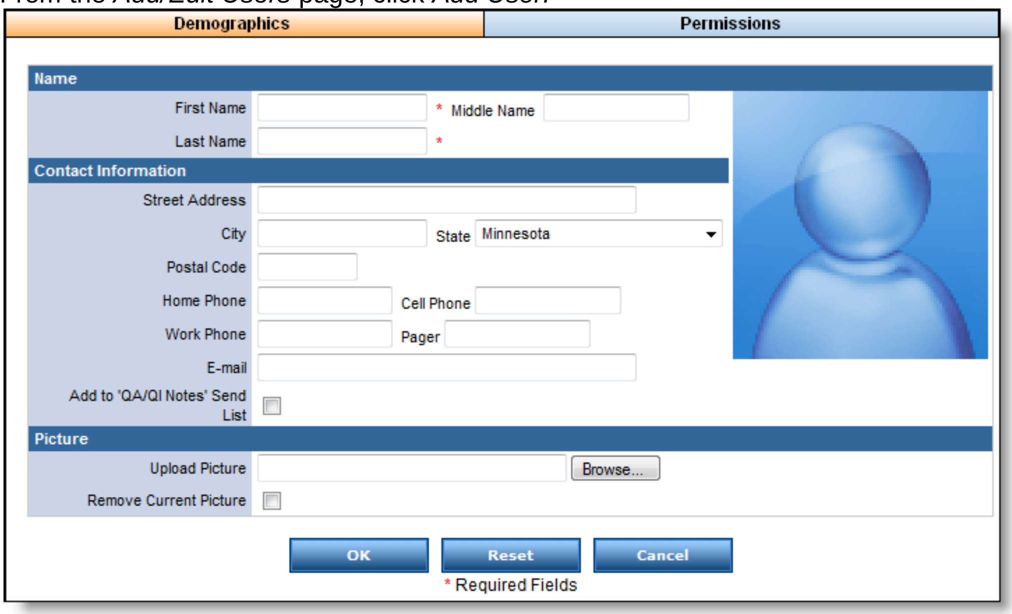
Records 1-25 of 143 Next
Goto Page: 1 ... 2 3 4 5 ... 6

Adding New User Profiles

User profiles that are created in the *Admin* section will not be available from any service for use in run forms or as a staff member. Staff profiles created here are generally for system administrators, medical directors or others who need access to the information of specific services, but are not involved in the day-to-day operations of that service.

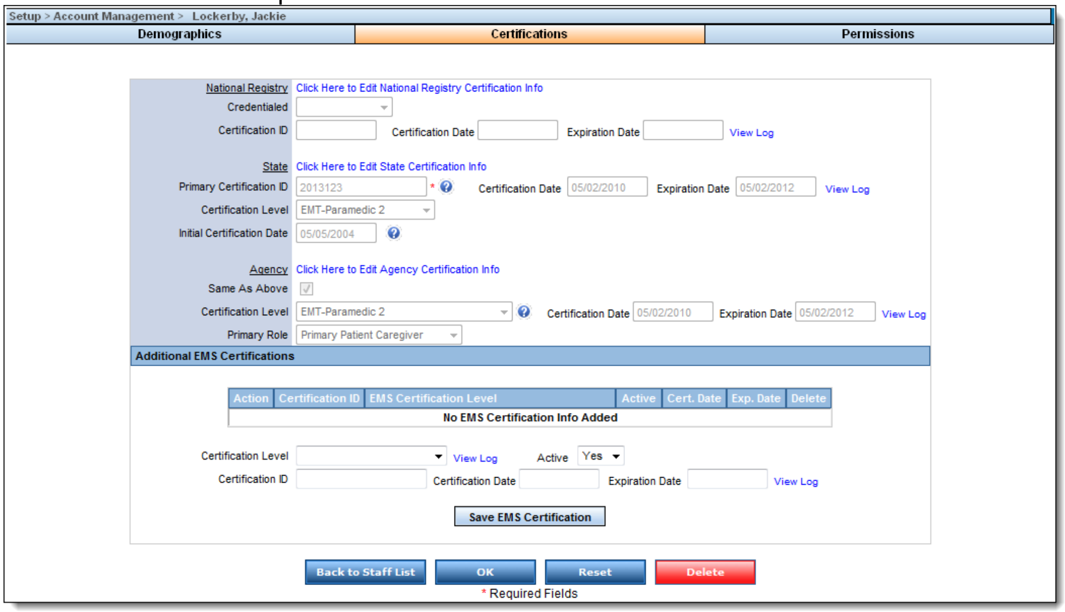
HINT: To create a staff profile that will be available from a service as a staff member and be available on run forms, add that staff member through the service. For more information on how to do this, please refer to the Service Administrator Guide.

1. From the *Add/Edit Users* page, click *Add User.*



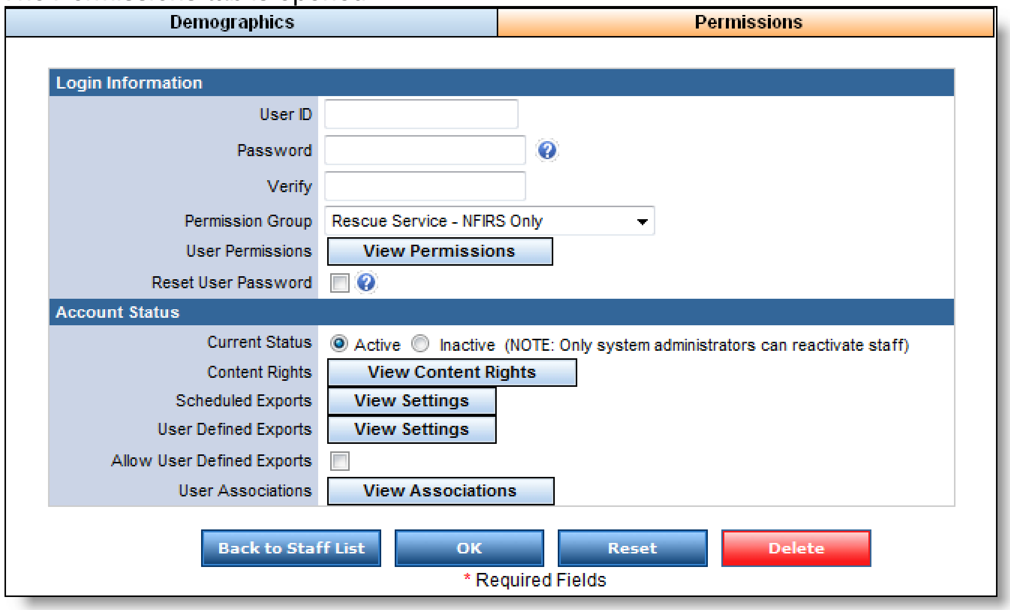
2. In the *Name* and *Contact Information* sections, enter the basic information about this system user.
3. To upload a picture of the user to the system, in the *Picture* section,
   a. Click *Browse…*
   b. Navigate to and select the desired picture.
   c. Click *Open.*

4. Click *OK.*
   The *Certifications* tab opens.



5. 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: This section must be completed in order for users to appear as providers on the run form. This information is not required for non-responders (e.g., ambulance directors or billing officers).
6. **OPTIONAL:** 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.*

7. When finished adding all certifications, click *OK.*
   The *Permissions* tab is opened.



8. In the *Login Information* section, enter a username and password for the system user.
   NOTE: Be sure to send this information to the user. Users will be prompted to change their password upon their first login for security.
9. From the *Login Information* section, in the *Permission Group* drop down menu, select the group with the level of access that this user should have.
   HINT: To view the permission groups, under *Site Management* and *Users & Security,* click *Global Security.* This will display a list of permission groups for which administrators can view the individual rights and permissions assigned.
10. To view additional security settings related to the user's ability to view EMS run forms, click *View Permissions.*

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 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.

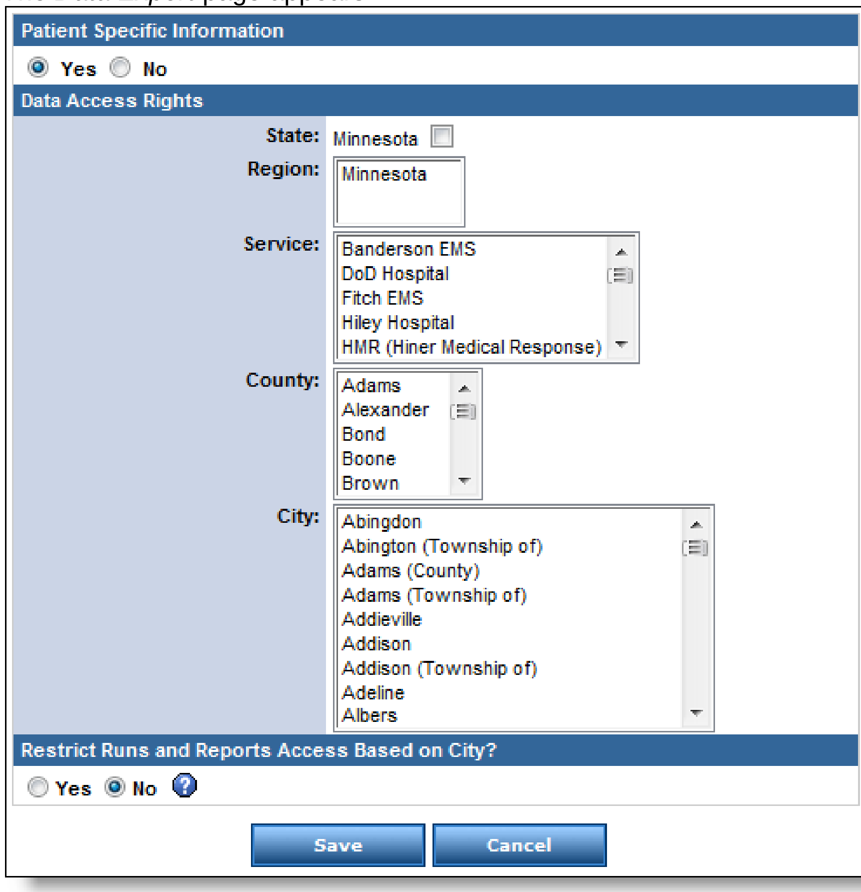
Ability to switch run form template
Determines whether this user will be able to change run form templates after a run form is started.

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

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

11. To force the user to reset his or her password, select the *Reset User Password* checkbox.
    NOTE: If users are not required to change their passwords periodically in the *Account Access Control* section, this option will not work. For more information, please refer to the *Working with Permission Groups* section.
12. In the *Account Status* section, select whether this profile should currently be active (i.e., useable) within the system.
13. To view individual system elements to which the user has access, click *View Content Rights.*
14. To view exports that have been set up for this user, in the *Scheduled Exports* or *User Defined Exports* section, click *View Settings.*
15. To select information which should be restricted for exports or to restrict this user to a particular city for runs and reports,

a. In the *User Defined Exports* section, click *View Settings.*
The *Data Export* page appears.



b. To allow this user access to patient specific data for exports, in the *Patient Specific information* section, select *Yes.*
c. To select location information to which this user has access for exports, in the *State, Region, Service, County* and *City* scroll lists, select the locations to which this user should have access.
d. To prevent this user from working with runs and reports from cities other than those selected, in the *Restrict Runs and Reports Access Based on City* section, select *Yes.*
e. When finished, click *Save.*

16. To allow a user to initiate data exports of his or her collected data without the administrator's assistance, in the *Allows User Defined Exports* section, select the *Allow User Defined Exports* checkbox.

    HINT: If this option is not selected, the user's information will only be exported through data transfers scheduled by the administrator.
17. To view any user associations (i.e., if two accounts for separate facilities are maintained with a single set of login information for one user), click *View Associations.*
18. If security questions are enabled in this system, to force this user to reset the answers to those questions, select the *Reset All Security Answers* checkbox.

    NOTE: When editing your own profile, a list of your questions and answers will appear in this section for editing.
19. To save this record in the system, click *OK.*
    To close the record without saving, click *Back to Staff List.*

Viewing and Editing Existing Profiles

System administrators can view and edit profiles for existing users. A user's profile contains a basic profile with contact information as well as sections defining their rights and permission levels for the system and access to hospitals.

1. From the *Add/Edit Users* page, navigate to name of the user whose profile you would like to view.
   HINTS: To view a list of profiles from a particular permission group, in the *Filter by Permission Group* drop down menu, select the desired group.
   To search for a particular user by their last name, type the name in the *Last Name* text box and click *Find.*
   To view another page of records, click the *Next* or *Previous* buttons to navigate to a new page.
2. To view the user's basic profile, click their name.
3. To edit the profile, click *Edit*.
4. Click a tab to work with the fields in that tab.
   NOTE: The tabs displayed in this profile are the same as the tabs displayed in the user profile accessed from the *My Service* tab, although additional tabs are available through the user profile accessed from the *My Service* tab.
5. Using the provided fields, change or add any desired information.
6. To save any changes, click *OK*.
   To return to the staff profile without saving changes, click *Back to Staff List*.

Removing User Profiles

The system administrator can remove user profiles from the system.

WARNING: This option should be used with caution, as removing a user profile with from the system will remove the user's information from all other records with which he or she is associated. For instance, if the user has completed run forms, the system will no longer recognize the user who created the run form and so the run report will be incomplete. In order to prevent a user from accessing the system without removing the profile and its information, the profile can be marked inactive in the *Account Status* section.

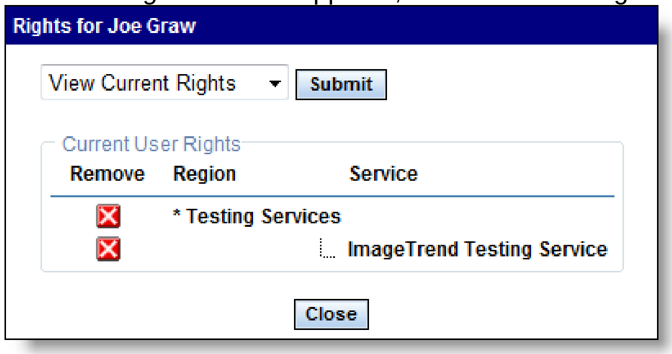
To remove a user profile:

1. From the *Add/Edit Users* page, navigate to and click the name of the user profile to delete.
2. Click *Delete.*
3. In the confirmation dialog box, click *Yes.*
   The record is removed from the system.

Assigning Service Rights

Before a user can use the State Bridge, he or she will need to be assigned to at least one service. This will allow the user to access information about that service, but the user will still not be included as a staff member for the service.

1. From the *Add/Edit Users* page, for the desired user, click the *Set Service Rights* icon.
The *View Rights* window appears, with the access rights the user currently has displayed.

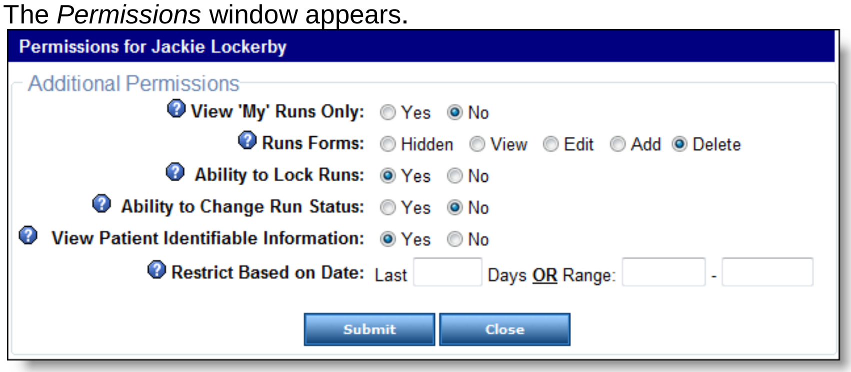


a. From the drop down menu, select the appropriate option to assign rights and click *Submit.*
b. If *Give Additional Rights* is selected, from the *Regions* drop down menu, select the region containing the desired service(s).
The *Service* scroll list appears.
c. From the *Service* scroll list, select the desired service(s).
HINT: To select multiple services, press and hold *Ctrl* while selecting each service.
d. Click *Add.*
e. To remove any rights, from the list of current rights, click the corresponding *Remove* icon.
f. When finished, click *Close.*

Assigning Additional Permissions

Administrators can set up the amount of access that users will have to run form data.

1. Click the corresponding *Permissions* icon.
The *Permissions* window appears.



2. Using the provided fields, select the desired access options.

View My Runs Only
Gives the user access to past run reports with which he or she is associated.

Runs Forms
Determines the level of access the user will have to run forms. 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 Patient Identifiable Information
This option determines whether this user will be allowed to view patient identifiable information on run forms.

View "All" QA/QI Notes
Determines whether this used has the ability to view all QA/QI notes in the system or only the ones pertaining to runs he or she is listed as a staff member on.

Ability to Switch Run Form Template
This option determines whether the user can change the template used for a run form that has already been started.

Ability to Lock Trainings
Determines whether this user has the ability to lock trainings to prevent editing.

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

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

Setting Up Associations for User Profiles

As an administrator, you have the ability to set up user profiles for any staff members who will need to log in to the system and fill out run forms. If some of your users are involved in several different services or teams that keep their records separate on the State Bridge (e.g., a staff member who is a part of two different services in neighboring cities), that staff member will have separate user profiles for each service or team. Due to this, that user will often have several usernames and passwords to coordinate.

Setting up an association allows you to link multiple user profiles that a single user might have so that user only needs to remember one username and password. Then, when that user logs in, he or she can select which service or team he or she is currently working with. In this way, the user only needs to remember one set of login information, but all information is kept with the correct service or team's records.

When you set up an association, you will need to link two user profiles for a single staff member. When doing this, you will need to decide which service or team should be that staff member's primary service. When that staff member logs in, he or she will be brought into that service in the State Bridge by default.

1. Add a user profile for the staff member for that staff member's primary service.
   HINT: For additional information, please refer to the Service Administrator Guide.

2. Add a user profile for the staff member for the additional service without entering a username and password.

   HINTS:

   For additional information, please refer to the Service Administrator Guide.
   Each profile can have different permission groups, which will allow that user to have different levels of access to each service.
   Make sure that both profiles have a personnel ID assigned to this user in the *Employment* tab of the profile.
3. To work with system users, from the upper right, click *Admin.*
4. Under *Site Management,* click *Users & Security.*
   A sub-menu appears.
5. Under *Users & Security,* click *Users.*
   The *Add/Edit Users* page appears.

Setup > Account Management > Add/Edit Users

Last Name: Lic #: Find Clear

Filter By: - Select a Permission Group - | - Select a Status - | - Select a Level - | - Select a Service -

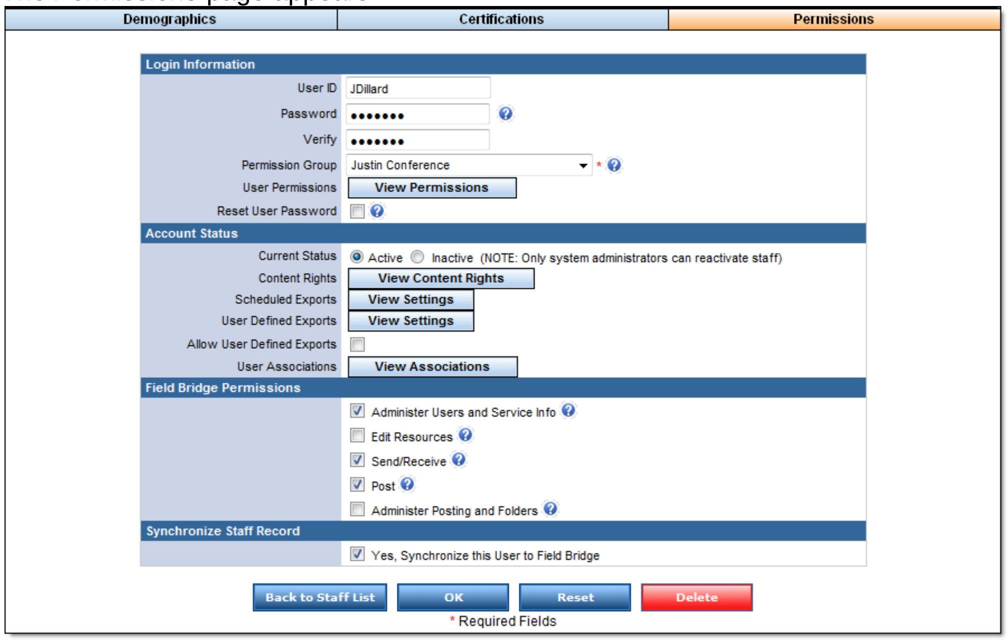
First Name	Last Name	Service	Permissions Group	Associations	Active	Actions
ImageTrend	Admin		Administrative Level 1		☑	
Fire	Admin	Imagetrend Fire Department	Rescue Service Administrator		☑	
Fire	Admin	Adams Vol	Rescue Service Administrator		☑	
Fire	Admin	Eagan Fire Department	Administrative Level 1		☑	
Fire	Admin	Duluth Fire Department	Rescue Service Administrator		☑	
Maine	Admin	Maine Linkage (Do Not Use)	Rescue Service Administrator		☑	
James	Admin	Imagetrend Fire Department	Administrative Level 1		☑	
Inspector	Admin	Mercy Regional Hospital	Fire Inspectors		☑	
Locations	Admin	Mercy Regional Hospital	Locations Owner Only		☑	
Occupants	Admin	Mercy Regional Hospital	Occupants Owner Only		☑	
Fire' Quinn	Admin' Quinn	Imagetrend Fire Department	Administrative Level 1		☑	
Bryan	Andersen	Imagetrend Fire Department			☑	
Bryan	Anderson	Imagetrend Fire Department	Fire Inspectors		☑	
Bryan	Anderson	Richfield	Rescue Service Administrator		☑	
Ryan	Arneson	Hiner EMS	Rescue Service Provider		☑	
Bryan	B'Ernhart	Imagetrend Fire Department	Administrative Level 1		☐	
bryan	bernhart2				☐	
bryan	bernhart2				☐	
	BLVD				☐	
	BLVD				☐	
Teri	Bowar	Apple Valley	Rescue Service Administrator		☑	
Bill	Brasky	Red Wing Fire Department	Rescue Service Administrator		☑	
Hospital	Buffalo Hospital User				☑	
George	Bush	Burnsville	Fire Inspectors		☑	
Taylor	Camelone		Rescue Service Administrator		☑	

Records 1-25 of 143 Next

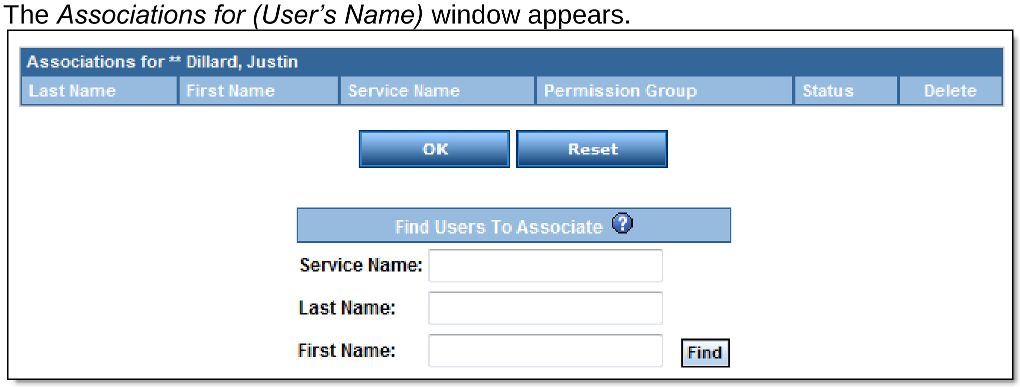
Goto Page: 1 ... 2 3 4 5 ... 6

6. Using the search fields, locate the user profile you created for the primary service.
7. Click the linked first name for the user profile.
   The *Demographics* page of the user profile appears.

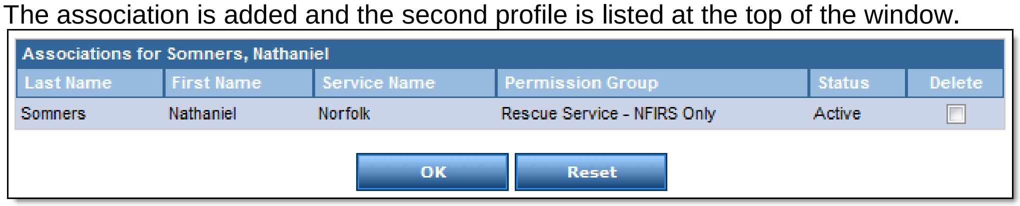
8. Select the *Permissions* tab.
   The *Permissions* page appears.



9. In the *Account Status* section, in the *User Associations* section, click *View Associations.*
   The *Associations for (User's Name)* window appears.



10. Using the *Service Name, Last Name* and *First Name* fields, enter information about the secondary user profile.
11. Click *Find.*
    A list of all user profiles matching your criteria appears.
12. Locate the profile you want to associate.
13. Select the checkbox for the desired profile.
14. From the bottom of the page, click *Add Associations.*
    The association is added and the second profile is listed at the top of the window.

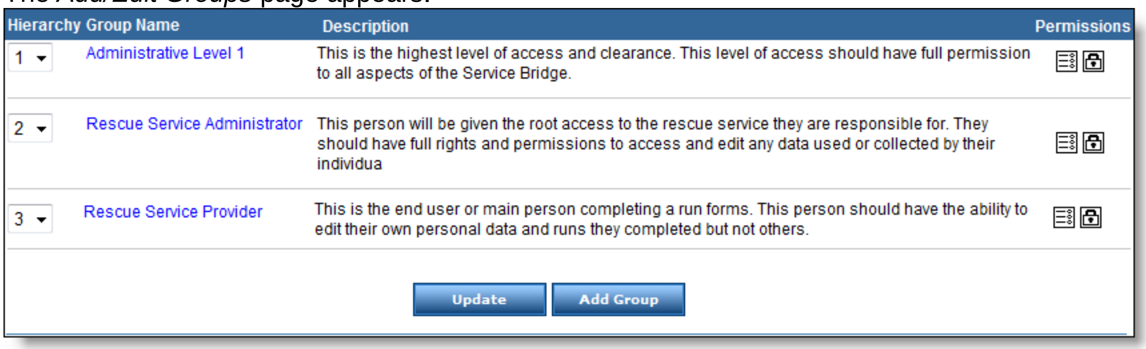


15. When finished, click *OK.*
    The association is saved.
16. Close the *Associations for (User Name)* window.
17. In the *Permissions* tab of the user profile, click *OK.*

3.3 Working with Permission Groups

Permission groups control user access to the State Bridge system. System administrators can configure existing permission groups to allow their users the optimal level of access, allowing them to perform necessary tasks while not providing them with extra features that may confuse them. System administrators can also create new permission groups.

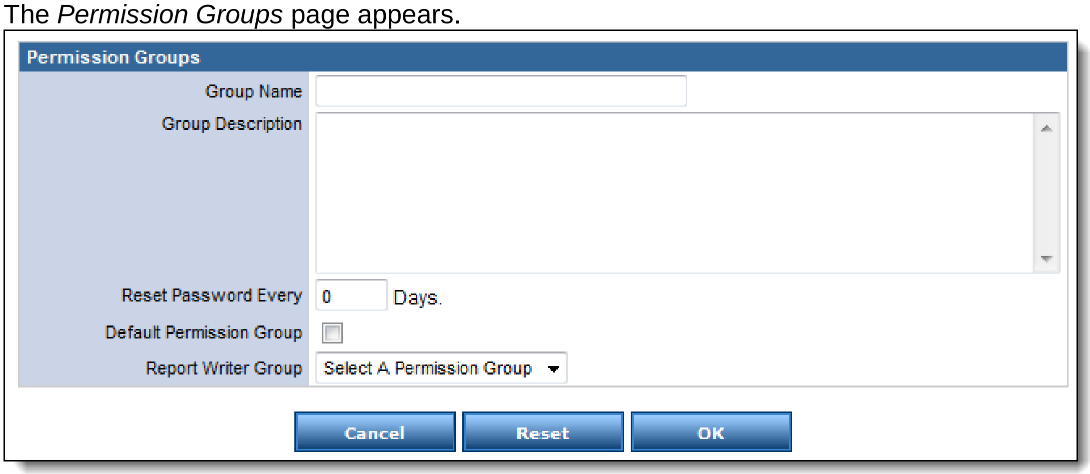
1. From the upper right, click *Admin.*
2. Under *Site Management,* click *Users & Security.*
   A sub-menu appears.
3. Under *Users & Security,* click *Global Security.*
   The *Add/Edit Groups* page appears.



Creating New Permission Groups

System administrators can create additional permission groups to better manage access to the State Bridge system.

1. From the *Add/Edit Groups* page, click *Add Group.*
   The *Permission Groups* page appears.

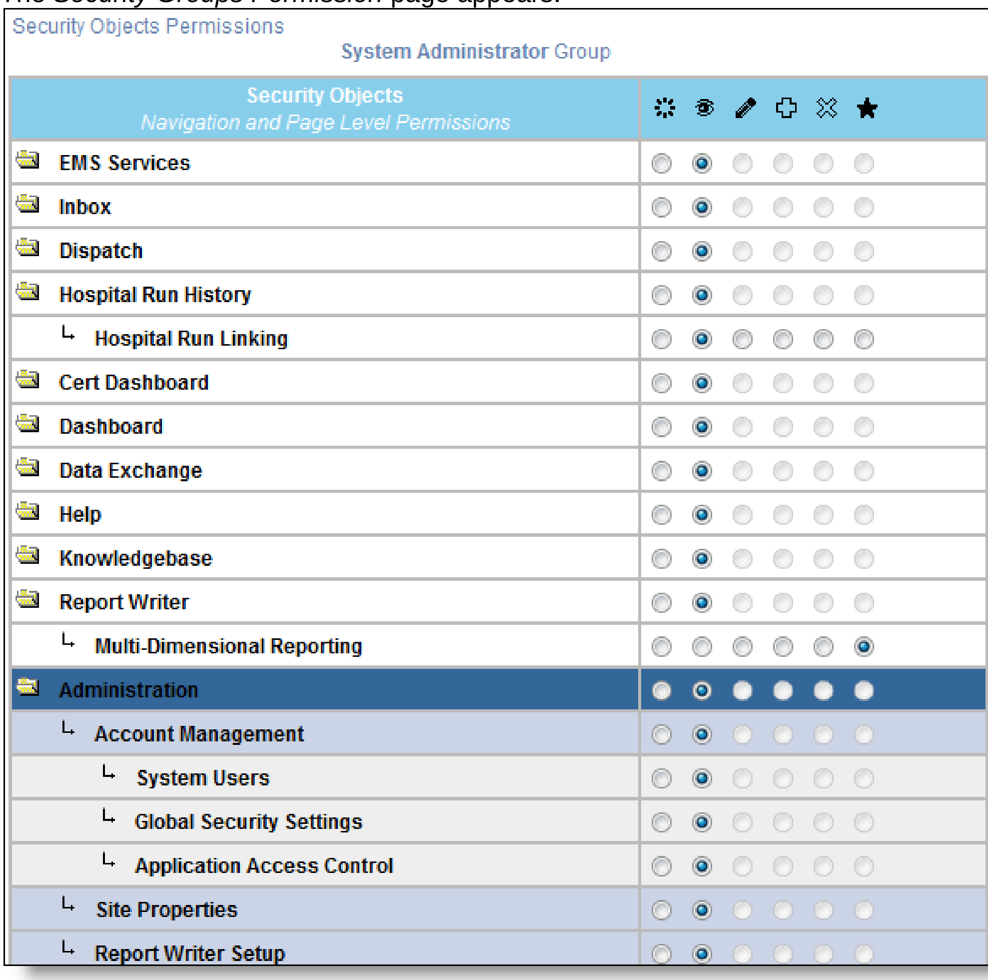


2. In the *Group Name* and *Group Description* text boxes, type an identifying name and description for the group.
3. In the *Reset Password Every* text box, type the maximum number of days before members of this group will be required to change their passwords.
   NOTE: Typing a number other than zero here also allows administrators to reset a user's password from their profile.
4. **OPTIONAL:** To set this as the default permission group that will be automatically selected for new user profiles in the system, select the *Default Permission Group*

checkbox.

HINT: Only one permission group can be the default permission group.

5. To associate a Report Writer permission group with this group, from the *Report Writer Group* drop down menu, select the desired permission group.
6. When finished, to save the new group in the system, click *OK.*
   The new group is created and given the default level of access to the system.
7. From the *Add/Edit Groups* page, click the *View Permissions* icon corresponding to the new group.
   The *Security Groups Permission* page appears.



8. In the *Group Permission* window, select the desired levels of access to all features for this group.

   NOTES:
   You have the ability to provide and restrict access to each aspect of the *Administration* tab.
   To apply a permission level across all levels of the *Administration* tab, select a level in the *Administration* row.
   When different permission levels are applied in the *Administration* for and the subsequent rows, the lower level of permission will always be applied.

   - **Invisible**: The group will not be allowed to view the page.
   - Read: The page will be viewable but in a Read-Only format. No changes will be allowed to be made when this option is checked.

- Change: This option gives the group the ability to change the layout as well the content of the page.
- Add: The group will have the ability to add pages under the current page.
- **Delete**: The *Delete* option allows the group to delete the current page.
- Owner: The *Owner* contains all the same rights as the above plus some additional ones when workflow is installed.

9. Click *Save.*
10. From the *Add/Edit Groups* page, click the *View Rights* icon corresponding to the new group.
11. Using the provided fields, select the level of access to run form data that users in this group will possess.

View My Runs Only
Gives the user access to past run reports with which he or she is associated.

Runs Forms
Determines the level of access the user will have to run forms. 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 Patient Identifiable Information
This option determines whether this user will be allowed to view patient identifiable information on run forms.

View "All" QA/QI Notes
Determines whether this used has the ability to view all QA/QI notes in the system or only the ones pertaining to runs he or she is listed as a staff member on.

Ability to Switch Run Form Template
This option determines whether the user can change the template used for a run form that has already been started.

Ability to Lock Trainings
Determines whether this user has the ability to lock trainings to prevent editing.

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

Restrict
The *Restrict* checkbox for each option allows you to prevent this user from giving any other user a higher level of permissions than he or she has. For

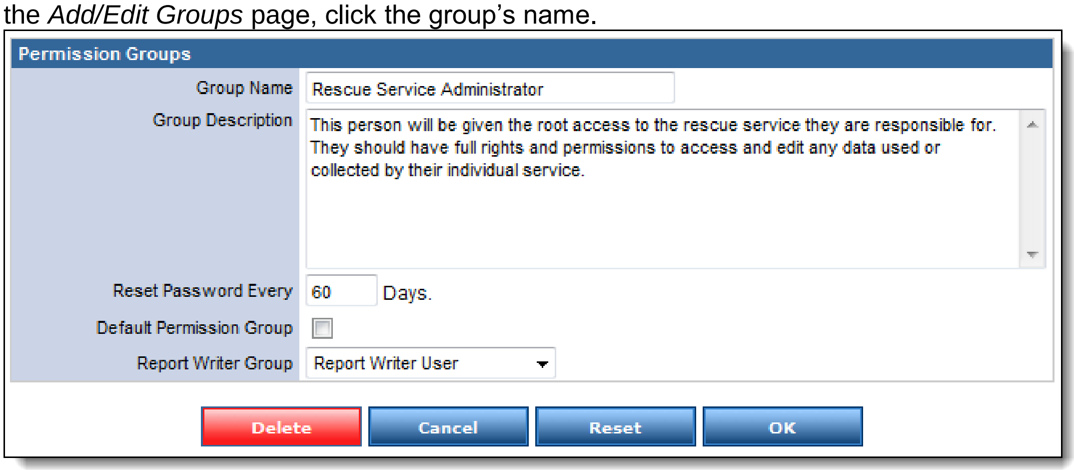
instance, a service administrator without *Delete* rights would be unable to grant any providers in his or her service with *Delete* rights.

12. Click *Submit.*
13. Using the *Hierarchy* drop down menus, select the number corresponding to this group's position in the list (smaller numbers higher on the list) and renumber the remaining groups to complete the list order.
    HINT: When you set up hierarchy, people will only be able to assign other users to permission groups with a hierarchy level that is the same or lower than the group they are included in. For example, a service administrator (level 3) would not be able to set up a system administrator (level 1).
14. Click *Update.*

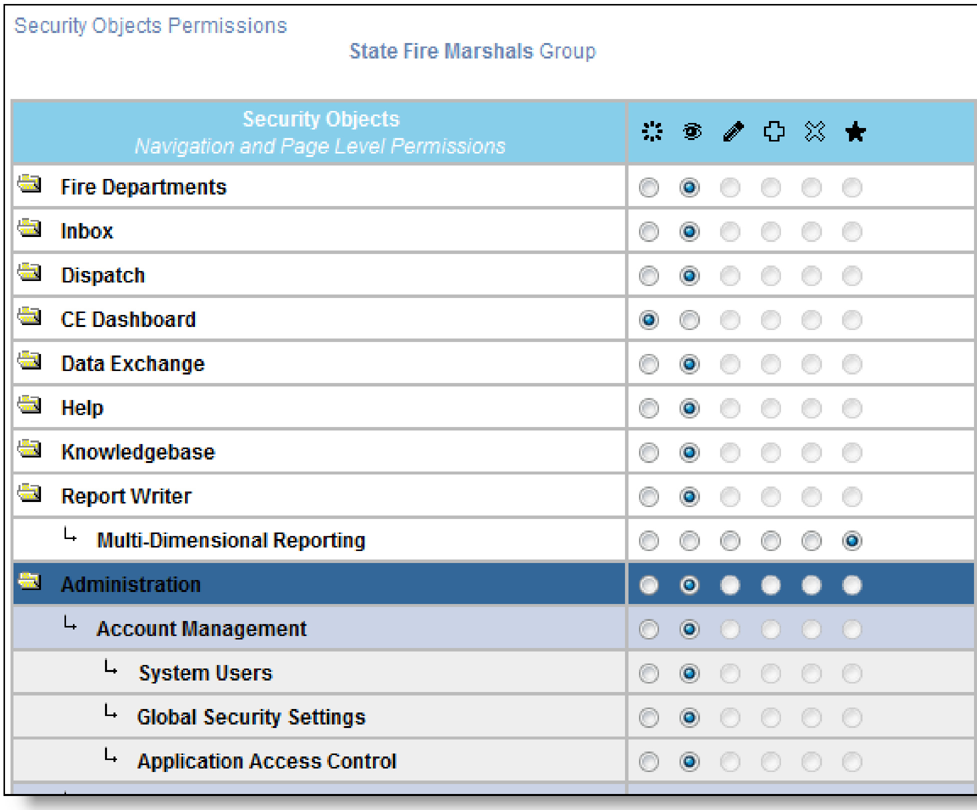
Viewing Permission Group Settings

Each permission group has settings for the individual access rights and levels of access that its users have.

1. To view a summary of the group and any description that has been created about it, from the *Add/Edit Groups* page, click the group's name.



2. To view the group's access to each feature of the system, click the corresponding *View Permissions* icon.



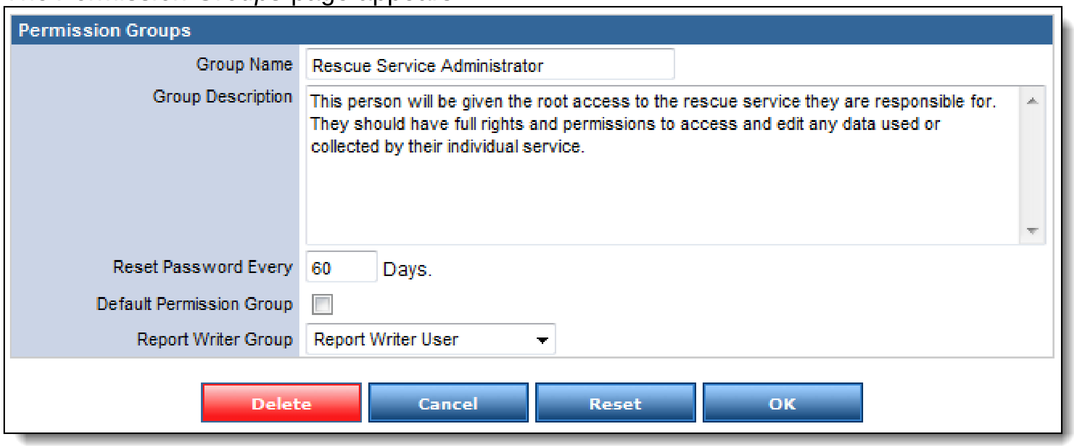
3. To view the group's access to particular key information from run forms, click the corresponding *View Rights* icon.

Editing Permission Setup

The system administrator can adjust the name, description and levels of access that a particular permission group has.

1. To edit the name, description or password reset requirements for a group,

a. From the *Add/Edit Groups* page, click the name of the desired group. The *Permission Groups* page appears.



b. In the *Permission Groups* table, change the name, description, or frequency that users within the group will be required to change their passwords, as desired.

c. When finished, to keep the changes, click *OK.*

2. To edit the access this permission group has to each feature of the system,

   a. From the *Add/Edit Groups* page, click the corresponding *View Permissions* icon .

   b. Using the provided permissions grid, change the levels of access to all desired features for this group.

   - **Invisible**: The group will not be allowed to view the page.
   - Read: The page will be viewable but in a Read-Only format. No changes will be allowed to be made when this option is checked.
   - Change: This option gives the group the ability to change the layout as well the content of the page.
   - Add: The group will have the ability to add pages under the current page.
   - **Delete**: The *Delete* option allows the group to delete the current page.
   - Owner: The *Owner* contains all the same rights as the above plus some additional ones when workflow is installed.

   c. When finished, to keep the changes, click *Save.*

3. To edit the rights to run data,

a. From the *Add/Edit Groups* page, click the corresponding *View Rights* icon. The *Default Group Permissions* window appears.

b. Using the provided fields, change the amount of access that users in this group will have to run form data.

View My Runs Only
Gives the user access to past run reports with which he or she is associated.

Runs Forms
Determines the level of access the user will have to run forms. 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 Patient Identifiable Information
This option determines whether this user will be allowed to view patient identifiable information on run forms.

View "All" QA/QI Notes
Determines whether this used has the ability to view all QA/QI notes in the system or only the ones pertaining to runs he or she is listed as a staff member on.

Ability to Switch Run Form Template
This option determines whether the user can change the template used for a run form that has already been started.

Ability to Lock Trainings
Determines whether this user has the ability to lock trainings to prevent editing.

Restrict Based on Date

Allows the user to view run forms submitted only in the specified time frame.

Restrict

The *Restrict* checkbox for each option allows you to prevent this user from giving any other user a higher level of permissions than he or she has. For instance, a service administrator without *Delete* rights would be unable to grant any providers in his or her service with *Delete* rights.

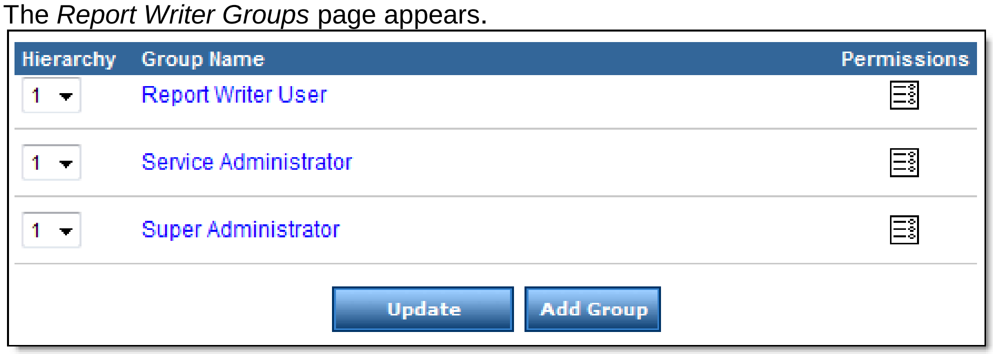
c. When finished, to keep the changes, click *Submit.*

4. To change the order in which groups appear, using the *Hierarchy* drop down menus, select numbers corresponding to the groups' order in the list (with smaller numbers appearing earlier in the list).
5. When finished, click *Update.*

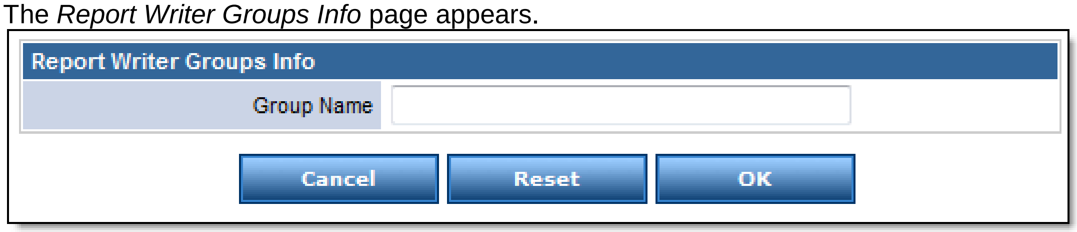
3.4 Working with Report Writer 2.0 Permissions

Permissions to Report Writer 2.0 are governed both in the permissions settings for each report and by the permission groups for Report Writer. Permission groups determine whether people have access to the Report Writer 2.0 link on the toolbar and the permission settings in each report determine what people can access for each report within Report Writer. For more information about setting up access to individual reports, please refer to the *Report Writer* chapter in the Service Administrator Guide.

1. From the upper right, click *Admin.*
2. Under *Site Management,* click *Users & Security.*
   A sub-menu appears.
3. Under *Users & Security,* click *Report Writer Security.*
   The *Report Writer Groups* page appears.

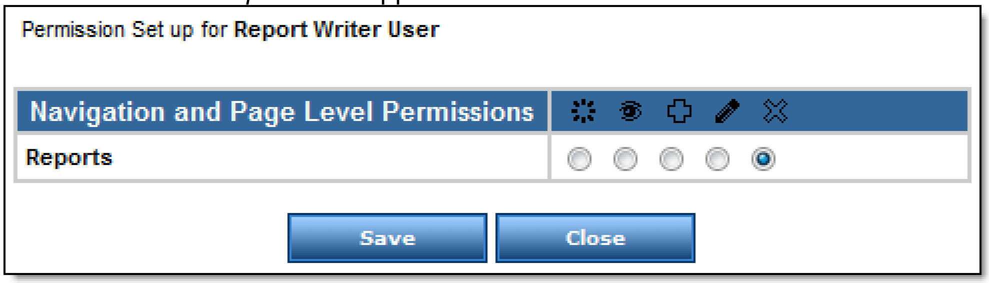


4. Click *Add Group.*
   The *Report Writer Groups Info* page appears.



5. In the *Group Name* text box, type a name for the group.
6. Click *OK.*
   The group is added.

7. For the new group, click the *Permissions* icon .
   The *Permission Setup* window appears.

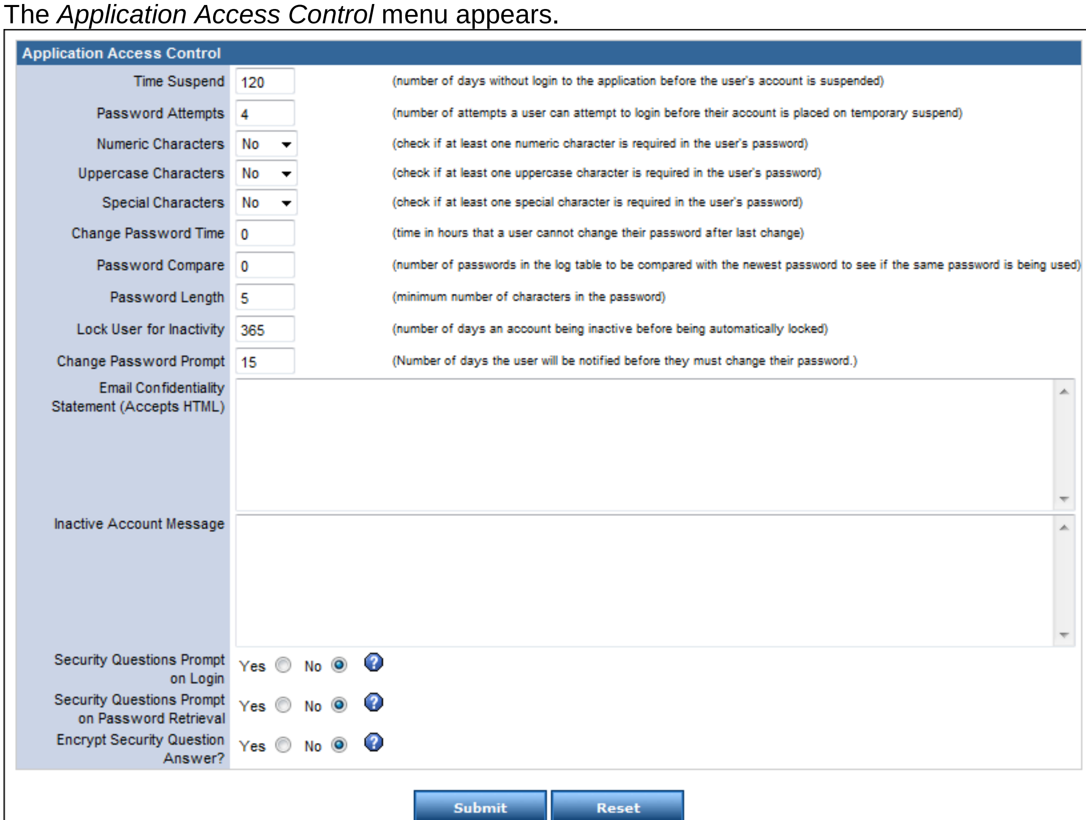


8. Select the desired level of access to the *Report Writer* link.
   HINT: In this case, the level of access to the system will be same if you select *Read, Edit, Add* or *Delete* rights. This level of permission sets whether the *Report Writer 2.0* link will appear on the toolbar for people in this group. If this link should not appear, assign *Hidden* permissions.
9. When finished, click *Save.*

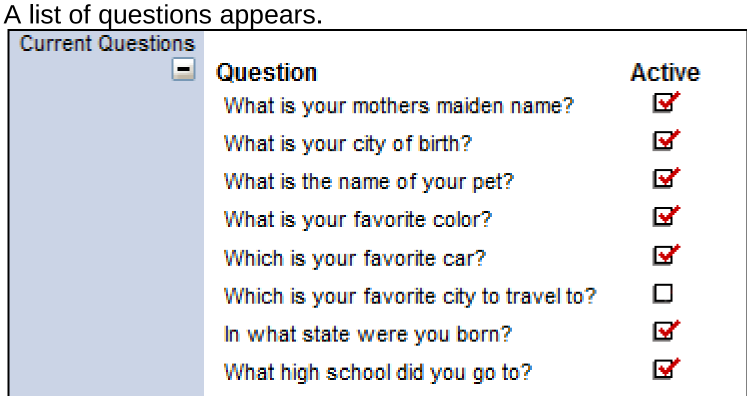
3.5 Working with Login Information

The system administrator can set up password and login requirements for all system users. This includes the ability to set how often passwords need to be changed and when they are prompted, what characters must be included and ways that accounts may be automatically suspended.

1. From the upper right, click *Admin.*
2. Under *Site Management,* click *Users & Security.*
   A sub-menu appears.
3. Under *Users & Security,* click *Logins and Passwords.*
   The *Application Access Control* menu appears.



4. To select the number of days that can pass without a user logging in before their account is suspended, in the *Time Suspend* text box, type the number of days.
5. To select how many times a user can incorrectly enter a password before their account is temporarily suspended, in the *Password Attempts* text box, type the number.
6. To require at least one numeric character in passwords, from the *Numeric Characters* drop down menu, select *Yes.*
7. To require at least one uppercase character in passwords, from the *Uppercase Characters* drop down menu, select *Yes.*
8. To require at least one special character (e.g., ! # $) in passwords, from the *Special Characters* drop down menu, select *Yes.*
9. To set a number of hours after a user creates a new password that they cannot create another new password, in the *Change Password Time* text box, type the desired number of hours.
10. To select the number of old passwords that the system will store for each user, in the *Account Password* text box, type the desired number.
11. To select the number of old passwords against which a new password will be compared to prevent passwords from being reused, in the *Password Compare* text box, type the number.
12. In the *Password Length* text box, type the minimum number of characters that should be included in the password.
13. To set the number of days a user account can go without logging in before the account is inactivated, in the *Lock User for Inactivity* text box, type the number of days.
14. In the *Change Password Prompt* text box, type the number of days before the user must change his or her password that he or she will be notified and prompted to make the change.
15. To set text that will appear at the bottom of all inbox messages, in the *Email Confidentiality Statement* text box, type the message.
16. To set a notification that will appear if a user's account is suspended or marked inactive, in the *Inactive Account Message* text box, type the message.
17. To require users to answer security questions every time they log in, in the *Security Questions Prompt on Login* section, select *Yes.*
18. To require users to answer security questions to retrieve a forgotten password, in the *Security Questions Prompt on Password Retrieval* section, select *Yes.*
19. To set the number of questions that a user should answer, from the *Security Answers Required* drop down menu, select the desired number.
20. If security questions are used, to write additional information for the users, in the *Security Question Support* text box, type the desired message.
    HINT: This could include information about who to call if the user forgets the answers to the security questions.
21. To view any existing security questions, from the *Current Questions* section, click *Show Current Questions.*
    A list of questions appears.



22. **OPTIONAL:** To make a question active (i.e., users will need to create an answer for the question and the question may appear to be answered), select the corresponding *Active* checkbox.

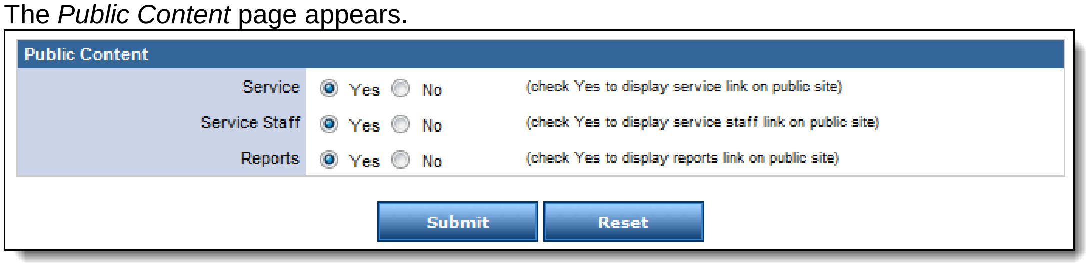
To make a question inactive (i.e., users will not need to answer this question), deselect the corresponding checkbox.

23. To add a new question,
    a. In the *New Questions* section, click the *Add Question* icon until blanks appear for each question.
    b. Type the text for each question in the corresponding text box.
       WARNING: Questions cannot be edited or deleted after submission, although they can be made inactive. Be sure that spelling and grammar are correct.
       NOTE: These questions will be saved when the entire page is submitted.
    c. If necessary, to remove a text box, click the *Remove Question* icon .
       The last text box will be removed.
       NOTE: One text box will always appear.
24. When finished, click *Submit.*

3.6 Controlling Content for the Public Site

While the majority of the content of any public facing site will be controlled by editing the page itself, system administrators can control whether links should be available to pages with information about the service, staff or reports. This can allow you to either easily show or hide information from the public according to your service or state's policies.

1. From the upper right, click *Admin.*
2. Under *Site Management,* click *Settings.*
   A sub-menu appears.
3. Under *Settings,* click *Public Content.*
   The *Public Content* page appears.



4. To display a link to a page with specific information, for the desired link, select *Yes.*
   OR
   To hide a link to a page with specific information, for the desired link, click *No.*
5. When finished, from the bottom of the page, click *Submit.*

CHAPTER 4

WORKING WITH SERVICES AND REGIONS

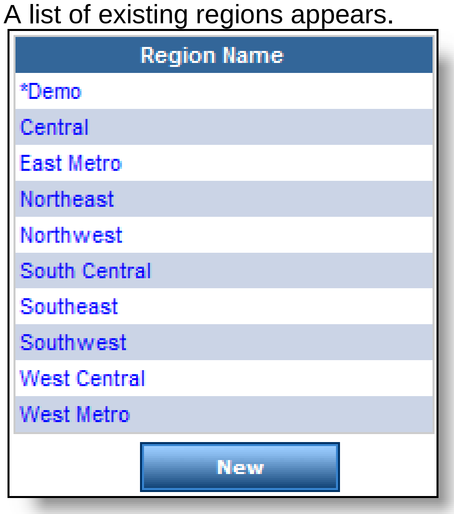
4.1 Chapter Overview

System administrators can set up regions and the services contained within those regions to assist with organization and locating services or incidents. This chapter explains how to view, edit and set up new regions and services.

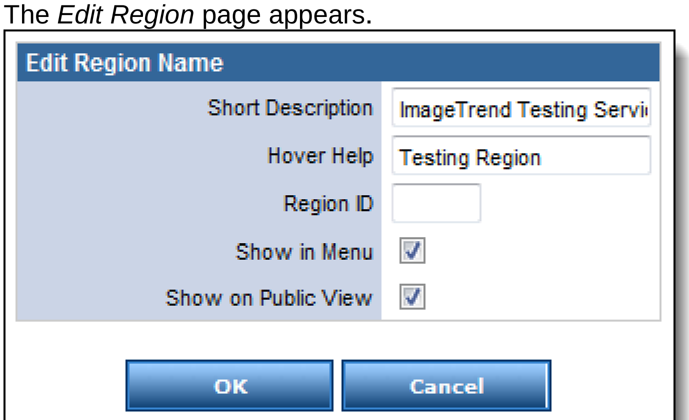
4.2 Viewing and Editing Regions

Administrators can view or edit the regions that are set up in the State Bridge.

1. From the upper right, click *Admin.*
2. Under *Site Management,* click *Site Resources.*
   A sub-menu appears.
3. Under *Site Resources,* click *Add/Edit Region.*
   A list of existing regions appears.



4. To view or edit the region information, click the region's name.
   The *Edit Region* page appears.



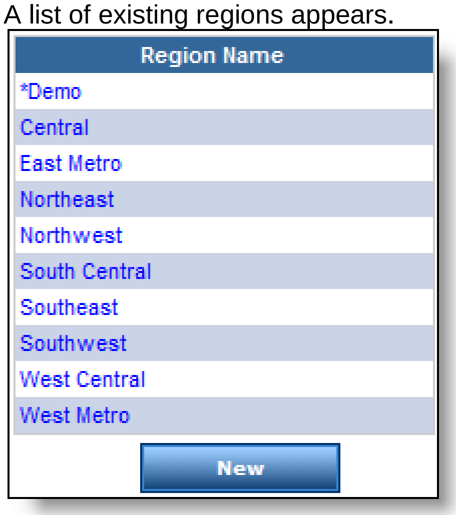
5. To change the name, in the *Short Description* text box, change the name.
6. To change the information that will appear when a user's mouse rests over the region name, in the *Hover Help* text box, type the new information.
7. To assign a region ID code to this region, in the *Region ID* text box, type the desired code.
8. To display this region in the list of regions when searching for a service, select the *Show in Menu* checkbox.
9. To display this region on the public website for the service, select the *Show on Public View* checkbox.

10. When finished, to save the changes, click *OK.*

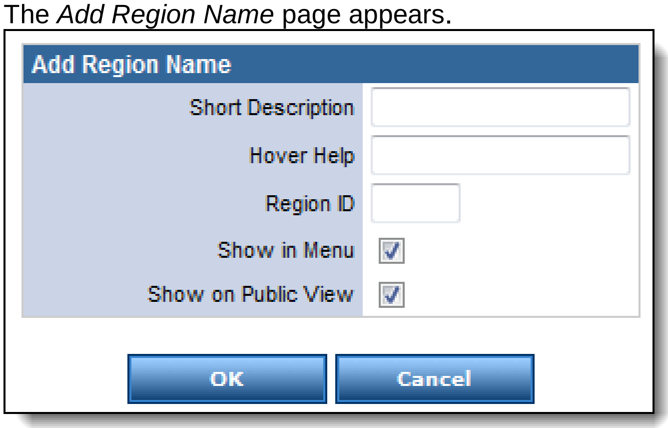
4.3 Adding New Regions

System administrators can create new regions. You must create regions before you can create services.

1. From the upper right, click *Admin.*
2. Under *Site Management,* click *Site Resources.*
   A sub-menu appears.
3. Under *Site Resources,* click *Add/Edit Region.*
   A list of existing regions appears.



4. Click *New.*
   The *Add Region Name* page appears.

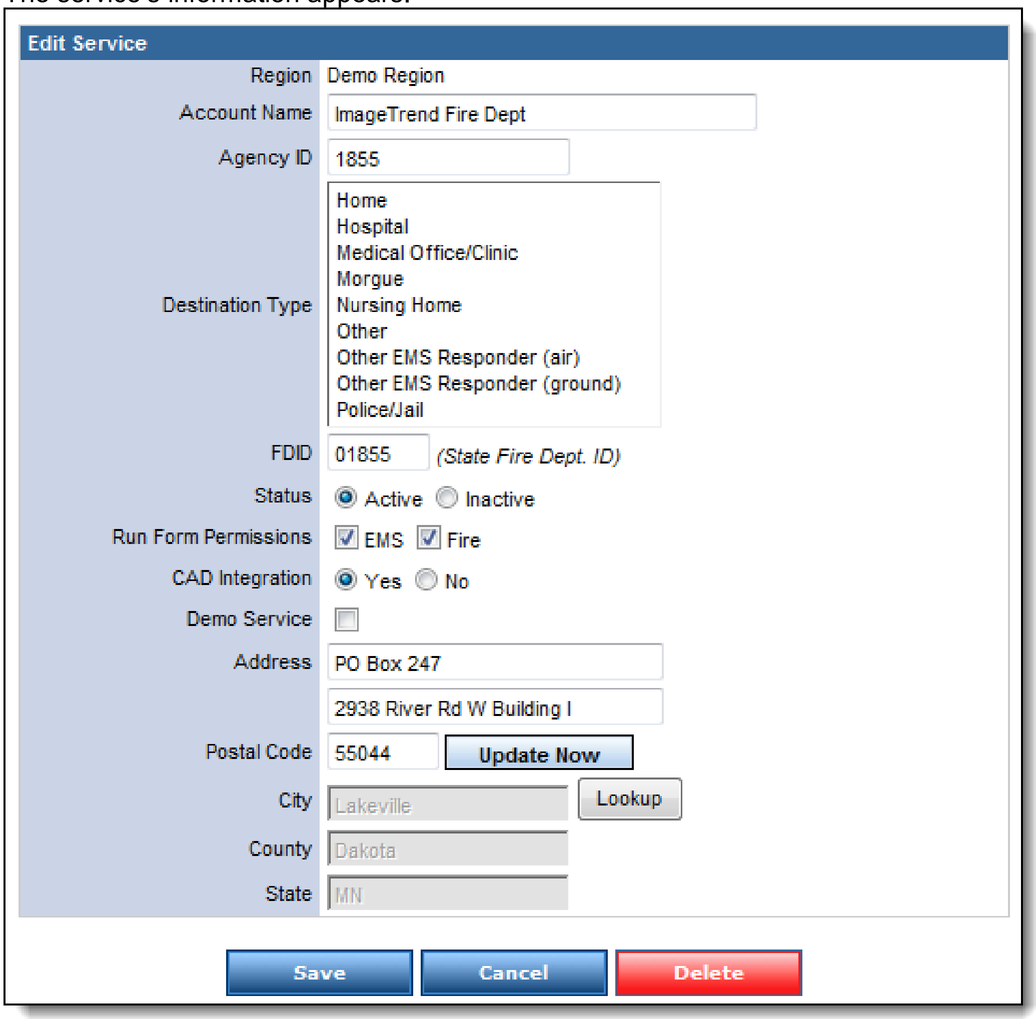


5. In the *Short Description* text box, type a name for the region.
6. To create the information that will appear when a user's mouse rests over the region name, in the *Hover Help* text box, type the new information.
7. To assign a region ID code to this region, in the *Region ID* text box, type the desired code.
8. To display this region in the left menu, select the *Show in Menu* checkbox.
9. To display this region on the public website for the service, select the *Show on Public View* checkbox.
10. When finished, to save the changes, click *OK.*

4.4 Viewing and Editing Services

Administrators can view services by region and view or change the information about each service.

1. From the upper right, click *Admin.*
2. Under *Site Management,* click *Site Resources.*
   A sub-menu appears.
3. Under *Site Resources,* click *Add/Edit Service.*
   A list of existing regions appears.
4. From the list, click the name of the region in which the desired service is contained.
   A list of all services contained within the region appears.
5. Click the name of the desired service.
   The service's information appears.



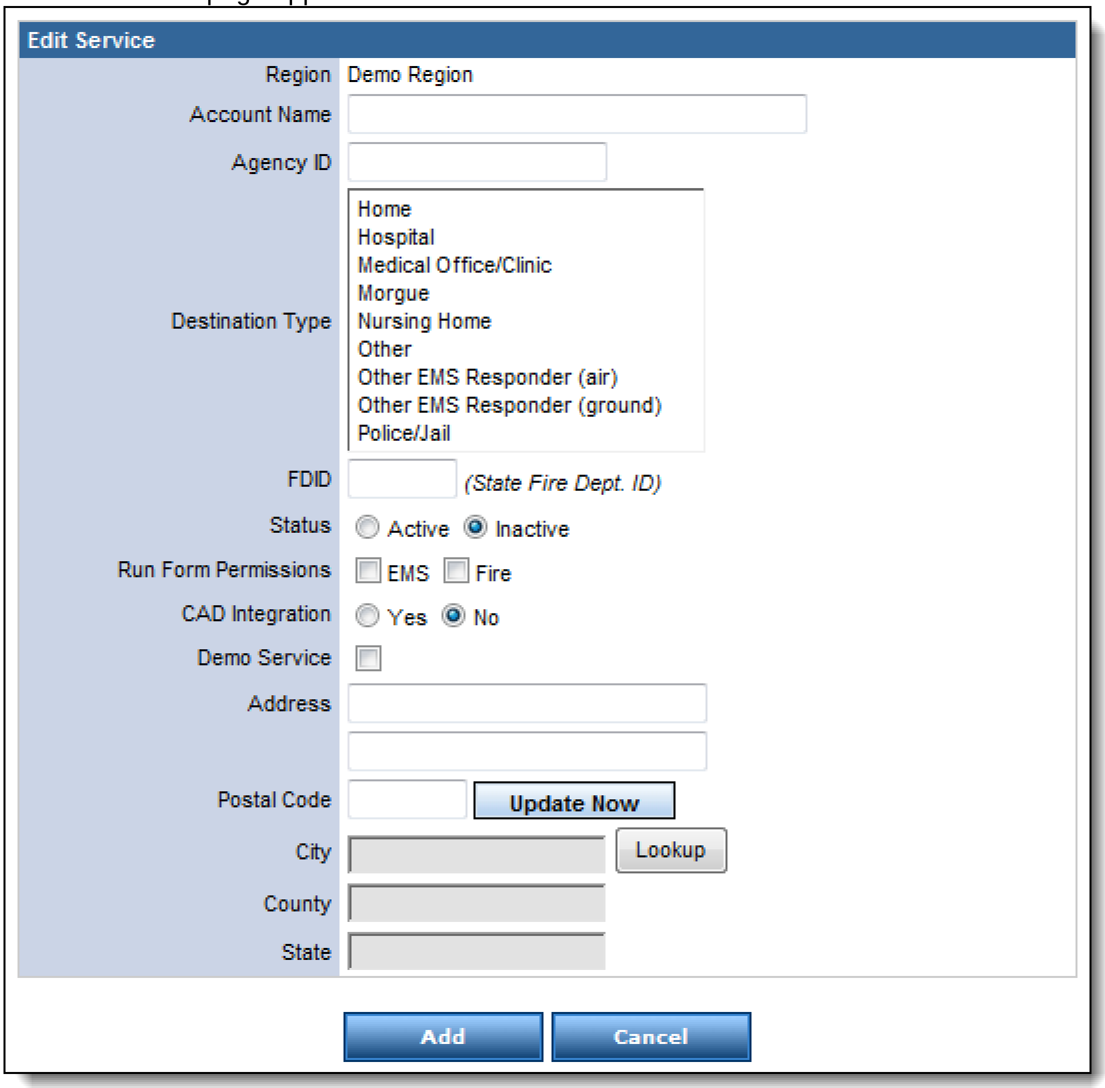
6. Using the provided fields, change any desired information about the service.
7. When finished, to keep the changes, click *Save.*

4.5 Adding New Services

System administrators can add new services to a region.

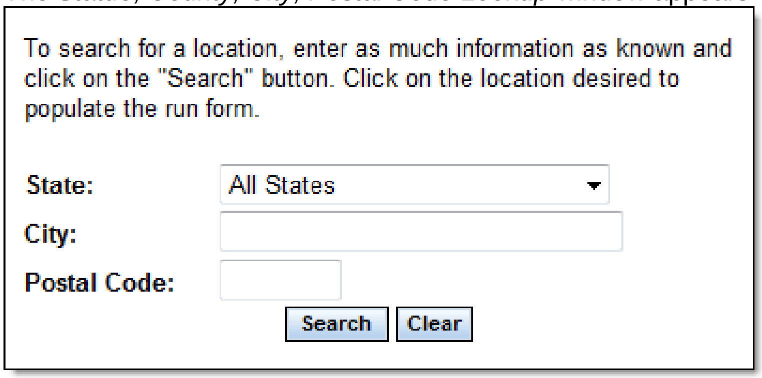
1. From the upper right, click *Admin.*
2. Under *Site Management,* click *Site Resources.*
   A sub-menu appears.
3. Under *Site Resources,* click *Add/Edit Service.*
   A list of existing regions appears.

4. From the list, click the name of the region in which the desired service is contained.
   A list of all services contained within the region appears.
5. Click *Add.*
   The *Edit Service* page appears.

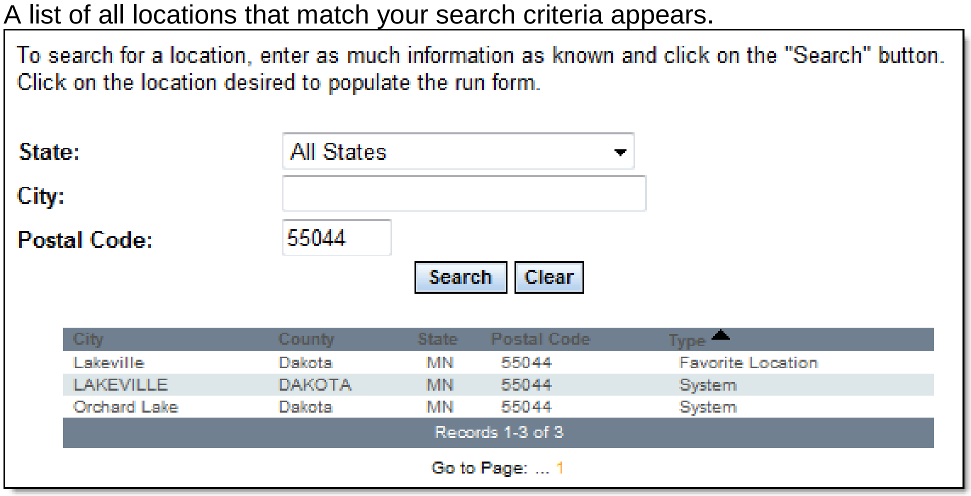


6. In the *Account Name* text box, type the name of the agency.
7. In the *Agency ID* text box, type a unique number for this agency's ID.
8. **OPTIONAL:** In the *Destination Type* scroll list, select the type of destination that this service transfers patients to most often.
9. **OPTIONAL:** If applicable, in the *FDID* text box, type the state fire department ID.
10. To make this service currently active and available for use in the system, in the *Status* section, select *Active.*
    OR
    To keep this service in the system for reference but not make it available for use, in the *Status* section, select *Inactive.*
11. In the *Run Form Permissions* section, select which types of incidents this service should be able to submit.
12. In the *CAD Integration* section, select whether this service has the optional CAD integration module.
13. If this service is for demonstration or testing purposes only, select the *Demo Service* checkbox.
14. In the *Address* text box(es), type the address of this service.

15. In the *Postal Code* text box, type the postal code of the service.
16. Click *Update Now.*
    The most common city, county and state information is filled in based on the postal code.
17. **OPTIONAL:** If the wrong city information was filled in, to look for a specific city,
    a. Click *Lookup.*
       The *Statue, County, City, Postal Code Lookup* window appears.



    b. Using the provided fields, enter any information to help you locate the correct location.
    c. Click *Search.*
       A list of all locations that match your search criteria appears.



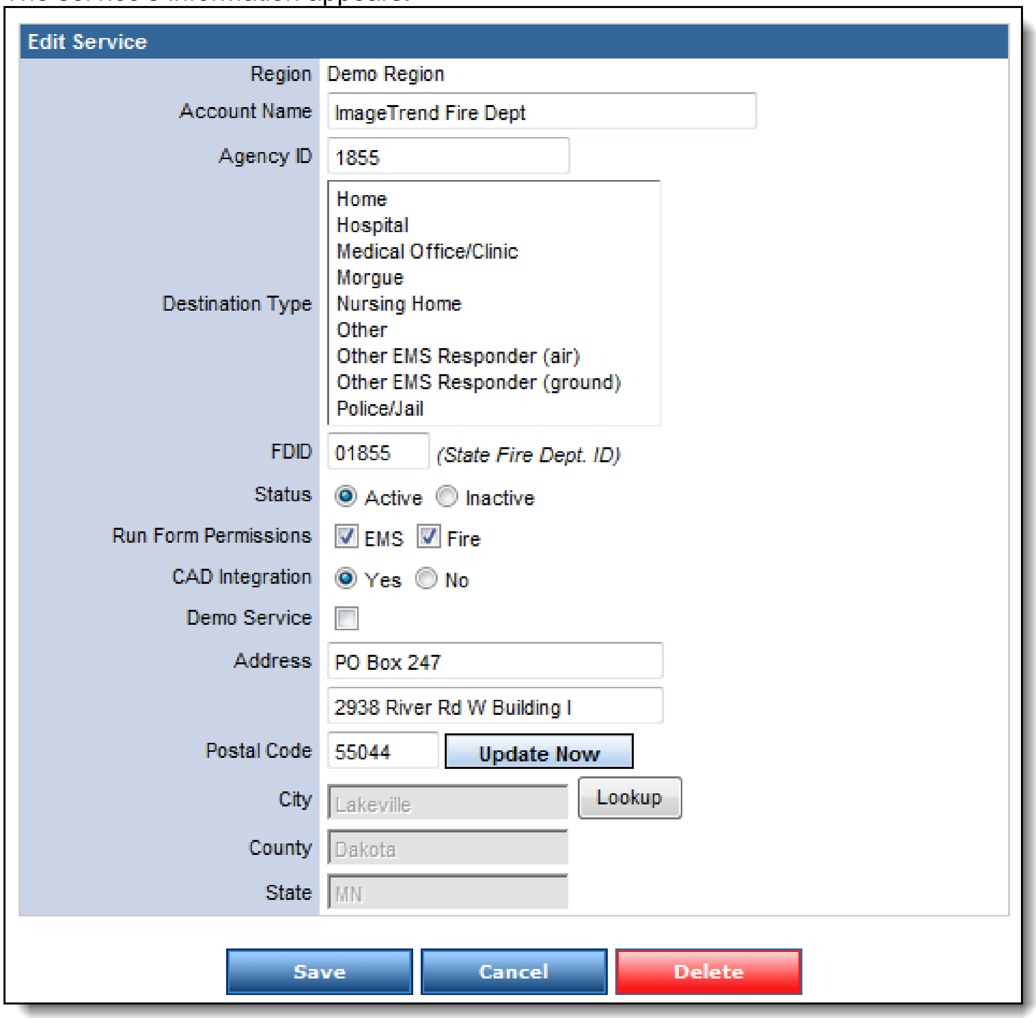
    d. Click the desired location.
       The location is entered.
18. When finished, to save the new service record, click *Add.*

4.6 Deleting Services

System administrators can delete services from the system.

1. From the upper right, click *Admin.*
2. Under *Site Management,* click *Site Resources.*
   A sub-menu appears.
3. Under *Site Resources,* click *Add/Edit Service.*
   A list of existing regions appears.
4. From the list, click the name of the region in which the desired service is contained.
   A list of all services contained within the region appears.

5. Click the name of the undesired service.
   The service's information appears.



6. Click *Delete.*
7. In the confirmation dialog box, click *Yes.*

CHAPTER 5

DATA IMPORT AND EXPORT

5.1 Chapter Overview

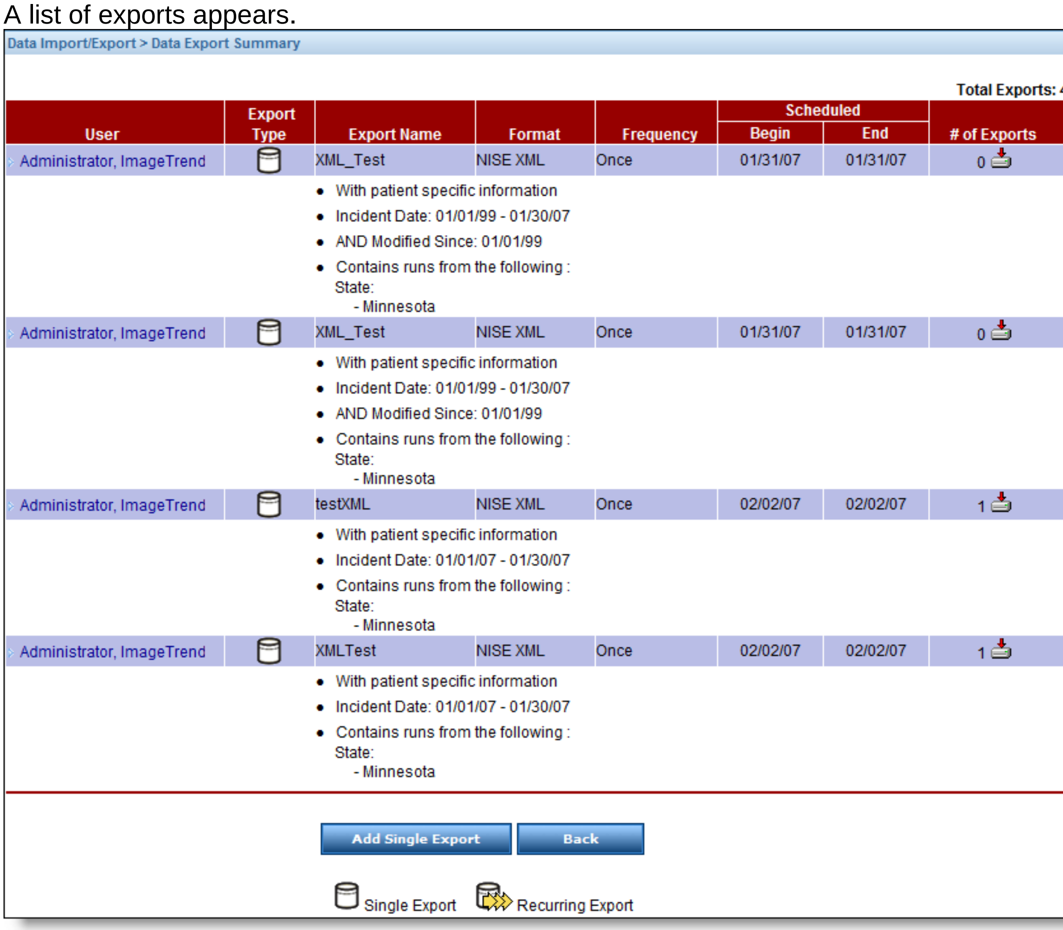
If the service has data imports or exports set up, system administrators can view reports summarizing the data exchange activity within the system. If the system administrator is familiar with the system, he or she can also set up new exports or imports.

5.2 Viewing Current Imports and Exports

System administrators can view information about all scheduled imports or exports, either single or recurring. In addition, they can view a variety of reports summarizing the performance of imports and exports in the system.

Viewing Current Exports

1. From the upper right, click *Admin.*
2. Under *Site Management,* click *Data Import & Export.*
   A sub-menu appears.
3. Under *Data Import & Export,* click *View All Export Tasks.*
   A list of exports appears.



Data Import/Export > Data Export Summary

Total Exports: 4

User	Export Type	Export Name	Format	Frequency	Scheduled Begin	Scheduled End	# of Exports
Administrator, ImageTrend		XML_Test	NISE XML	Once	01/31/07	01/31/07	0
		• With patient specific information • Incident Date: 01/01/99 - 01/30/07 • AND Modified Since: 01/01/99 • Contains runs from the following : State: - Minnesota					
Administrator, ImageTrend		XML_Test	NISE XML	Once	01/31/07	01/31/07	0
		• With patient specific information • Incident Date: 01/01/99 - 01/30/07 • AND Modified Since: 01/01/99 • Contains runs from the following : State: - Minnesota					
Administrator, ImageTrend		testXML	NISE XML	Once	02/02/07	02/02/07	1
		• With patient specific information • Incident Date: 01/01/07 - 01/30/07 • Contains runs from the following : State: - Minnesota					
Administrator, ImageTrend		XMLTest	NISE XML	Once	02/02/07	02/02/07	1
		• With patient specific information • Incident Date: 01/01/07 - 01/30/07 • Contains runs from the following : State: - Minnesota					

Add Single Export | Back

Single Export Recurring Export

Viewing Current Imports

1. From the upper right, click *Admin.*
2. Under *Site Management,* click *Data Import & Export.*
   A sub-menu appears.

3. Under *Data Import & Export,* click *View All Import Tasks.*
4. From the *Service Name* drop down menu, select the service for which to view the import tasks.
5. **OPTIONAL:** To retrieve one particular record, in the *Upload ID* text box, type the ID number assigned to the import when it was first created.
   A list of imports appears.

Reports

Data Transfer History

☑ = Completed ⚠ = Completed w/ Errors ☐ = Pending ☒ = Incomplete

	Uploaded Date	Utility	Records*	User	Status Import	Status Update	Status Validation
	09/20/07 03:51 PM	ImageTrend EMS Field Bridge	1	Service Admin	☑	☑	☑
	09/20/07 03:49 PM	ImageTrend EMS Field Bridge	1	Service Admin	☑	☑	☑
	09/20/07 03:47 PM	ImageTrend EMS Field Bridge	1	Service Admin	☑	☑	☑
	09/20/07 03:42 PM	ImageTrend EMS Field Bridge	0	Service Admin	☑	☒	☒
	09/04/07 03:43 PM	XML 2.0		Service Admin	☒	☒	☒
	07/25/07 04:32 PM	FIREHOUSE Software	382	ImageTrend Administrator	☑	☑	☒
	07/25/07 04:25 PM	FIREHOUSE Software	382	ImageTrend Administrator	☑	☑	☑
	07/11/07 04:32 PM	XML 2.0		Service Admin	☒	☒	☒
	07/11/07 11:21 AM	XML 2.0		Service Admin	☒	☒	☒
	06/11/07 11:47 AM	ImageTrend EMS Field Bridge	1	Ryan Ricard	☑	☑	☑
	06/11/07 11:46 AM	ImageTrend EMS Field Bridge	0	Ryan Ricard	☑	☒	☒
	06/11/07 11:45 AM	ImageTrend EMS Field Bridge	0	Ryan Ricard	☑	☒	☒
	06/11/07 11:44 AM	ImageTrend EMS Field Bridge	0	Ryan Ricard	☑	☒	☒
	06/11/07 11:43 AM	ImageTrend EMS Field Bridge	1	Ryan Ricard	☑	☑	☑
	06/11/07 11:42 AM	ImageTrend EMS Field Bridge	0	Ryan Ricard	☑	☒	☒

Records 1-15 of 237 Next

* = Total may represent more than one service's records if more than one service was uploaded at the same time.

ImageTrend Service Bridge v3.5

Viewing All Completed Imports

State Bridge provides a report listing all imports that have been completed.

1. From the upper right, click *Admin.*
2. Under *Site Management,* click *Data Import & Export.*
   A sub-menu appears.
3. Under *Data Import & Export,* click *Completed Import Report.*
   The initial report appears.

IMAGETREND FIRE BRIDGE

Completed Import Report

From: 07/01/07 - 11/07/2007 Go

Printed on 11/07/2007

Import Date	Import Utility	Total Services	Total Records	Import	Process	Validation	Total
ImageTrend EMS							
07/25/2007	Firehouse	1	382	0 (sec)	3 (min) 22 (sec)	0 (sec)	3 (min) 22 (sec)
09/20/2007	Field Bridge	1	1	0 (sec)	4 (sec)	1 (sec)	5 (sec)
09/20/2007	Field Bridge	1	1	0 (sec)	2 (sec)	1 (sec)	3 (sec)
09/20/2007	Field Bridge	1	1	0 (sec)	3 (sec)	1 (sec)	4 (sec)
Average:			96	0 (sec)	52 (sec)	0 (sec)	53 (sec)
			Records	Import	Process	Validation	Total
Averages of 4 Imports:			96	0 (sec)	52 (sec)	0 (sec)	53 (sec)

4. To adjust the dates displayed, in the *From* text boxes, select the correct dates and click *Go.*
5. To print the report,

a. Click the *Print Report* icon .
b. In the *Print* dialog box, select any custom printing options and click *Print.*

Viewing Imports in Progress

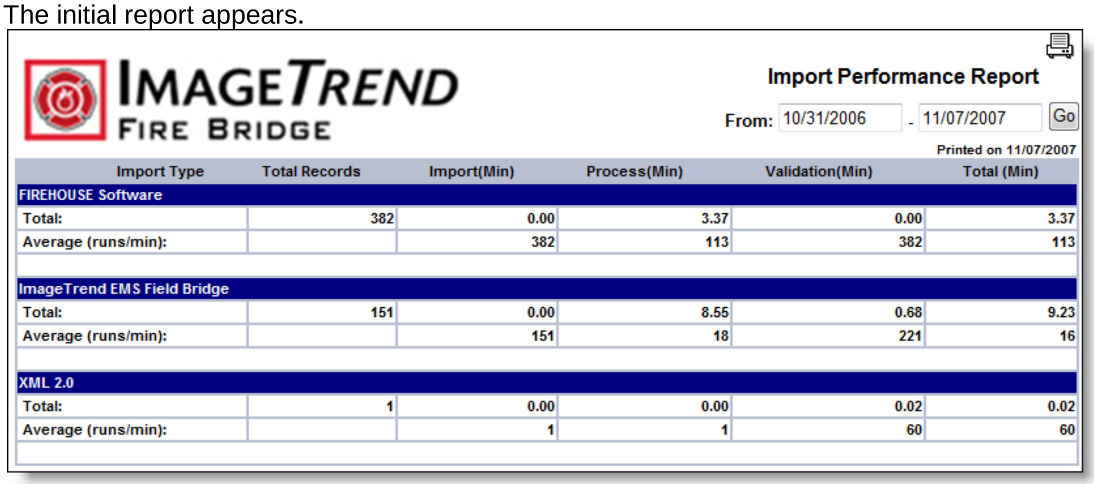
State Bridge will provide a report listing all imports that have been scheduled to begin but have not yet finished importing information. If an import was set up but found no data to retrieve, it may appear in this list even though it is not currently working on the import process.

1. From the upper right, click *Admin.*
2. Under *Site Management,* click *Data Import & Export.*
   A sub-menu appears.
3. Under *Data Import & Export,* click *In Progress Import Report.*
   The initial report appears.
4. To adjust the dates from which records are retrieved, in the *From* text boxes, type the appropriate dates and click *Go.*
5. To print the report,
   a. Click the *Print Report* icon .
   b. In the *Print* dialog box, select any custom printing options and click *Print.*

Viewing Import Performance

State Bridge provides a report summarizing the data imports done using State Bridge, including information about the total number of each type of import, the time taken to complete it and the validation score of the import.

1. From the upper right, click *Admin.*
2. Under *Site Management,* click *Data Import & Export.*
   A sub-menu appears.
3. Under *Data Import & Export,* click *Import Performance Report.*
   The initial report appears.


IMAGETREND FIRE BRIDGE

Import Performance Report

From: 10/31/2006 - 11/07/2007 Go

Printed on 11/07/2007

Import Type	Total Records	Import(Min)	Process(Min)	Validation(Min)	Total (Min)
FIREHOUSE Software					
Total:	382	0.00	3.37	0.00	3.37
Average (runs/min):		382	113	382	113
ImageTrend EMS Field Bridge					
Total:	151	0.00	8.55	0.68	9.23
Average (runs/min):		151	18	221	16
XML 2.0					
Total:	1	0.00	0.00	0.02	0.02
Average (runs/min):		1	1	60	60

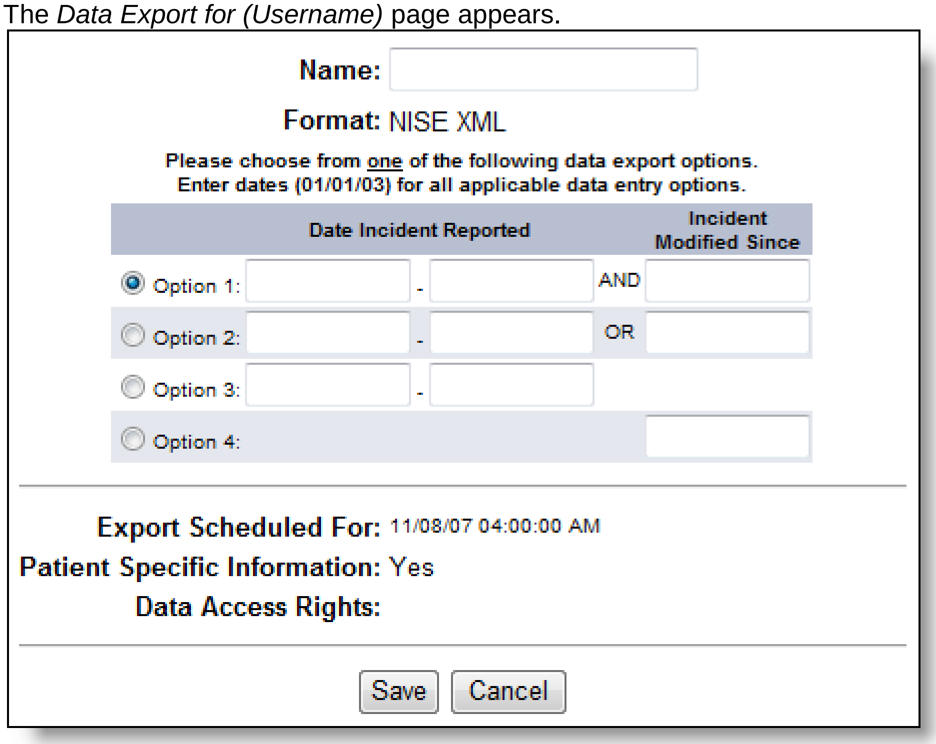
4. To adjust the dates from which records are retrieved, in the *From* text boxes, type the appropriate dates and click *Go.*
5. To print the report,
   a. Click the *Print Report* icon .
   b. In the *Print* dialog box, select any custom printing options and click *Print.*

5.3 Scheduling New Exports

System administrators can schedule exports singly or to recur at a specific time interval.

Scheduling Individual Exports

1. From the upper right, click *Admin.*
2. Under *Site Management,* click *Data Import & Export.*
   A sub-menu appears.
3. Under *Data Import & Export,* click *View All Export Tasks.*
4. Click *Add Single Export.*
   The *Data Export for (Username)* page appears.



Name:

Format: NISE XML

Please choose from one of the following data export options.
Enter dates (01/01/03) for all applicable data entry options.

	Date Incident Reported				Incident Modified Since
Option 1:		-		AND	
Option 2:		-		OR	
Option 3:		-			
Option 4:					

Export Scheduled For: 11/08/07 04:00:00 AM
Patient Specific Information: Yes
Data Access Rights:

Save Cancel

5. In the *Name* text box, type a title to identify this export.
6. In the *Option 1, Option 3, Option 3* or *Option 4* text boxes, type the dates for the records that should be exported.
   HINTS:
   Use *Option 1* to export all records that were entered between specific dates and have been changed since a particular date.
   Use *Option 2* to export all records that were entered between specific dates or that have been modified since a particular date.
   Use *Option 3* to export all records that were entered between specific dates.
   Use *Option 4* to export all records that were changed since a specific date.
7. To schedule the export, click *Save.*

Scheduling Recurring Exports

Scheduling recurring exports is handled differently for different types of exports. For information about setting up recurring exports for your service, please contact ImageTrend.

5.4 Viewing Mapped Data Exchange Destinations

System administrators can view the data ports that have been set up for importing and exporting data in the system. Setting up new data ports requires extensive knowledge of the databases being used in the State Bridge and in the other system being used for the import or export. To set up a new data port, please contact ImageTrend.

1. From the upper right, click *Admin.*
2. Under *Site Management,* click *Data Import & Export.*
   A sub-menu appears.
3. Under *Data Import & Export,* click *View Map Destinations.*
   A list of currently mapped destinations appears.

Map Destination	Dataport	Service	Export
edit ImageTrend EMS NEMSIS import meds	NHTSA Import Meds	ImageTrend EMS	
edit ImageTrend Nemsis Mapping Import	NHTSA Import Meds	ImageTrend Rescue	
edit NEMSIS Export	CodeRed	All	
edit NEMSIS/NISE 2.2 Import	NHTSA/NISE 2.2.1 XML Data Exchange	All	
edit SweetSoft Amazon Export Imagetrend EMS	SweetSoft Amazon Export	ImageTrend EMS	
edit SweetSoft Amazon Export ImageTrend Rescue	SweetSoft Amazon Export	ImageTrend Rescue	

Records 1-6 of 6

Goto Page: 1

Add New

5.5 Data Export Setup

System administrators can view a list of all data exports that are currently set up. To set up a new type of data export, please contact ImageTrend.

1. From the upper right, click *Admin.*
2. Under *Site Management,* click *Data Import & Export.*
   A sub-menu appears.
3. Under *Data Import & Export,* click *Data Export Setup.*
   A list of data exports appears.

DLL Related

Name	Service	Data Port
Hiley Amazon	Hiley Fire	SweetSoft Amazon Export
Hiley NISE XML Export	Hiley Fire	NISE XML Export

Web Service Related

Name	Service	Posting URL
None Available		

Add DLL Data Port   Add Web Service Data Port

CHAPTER 6

RESOURCE SETUP

6.1 Chapter Overview

System administrators can modify the setup of run form elements. If the service also utilizes the EMS Field Bridge, these changes will be passed down to the Field Bridge application. This chapter explains how to work with preset options for run forms including the destinations, mutual aid departments and patient medications. In addition, this chapter explains how to work with consent text for forms requiring signatures, validation options, mapping, the data elements included in each run form, and setting up data exports and run form statuses.

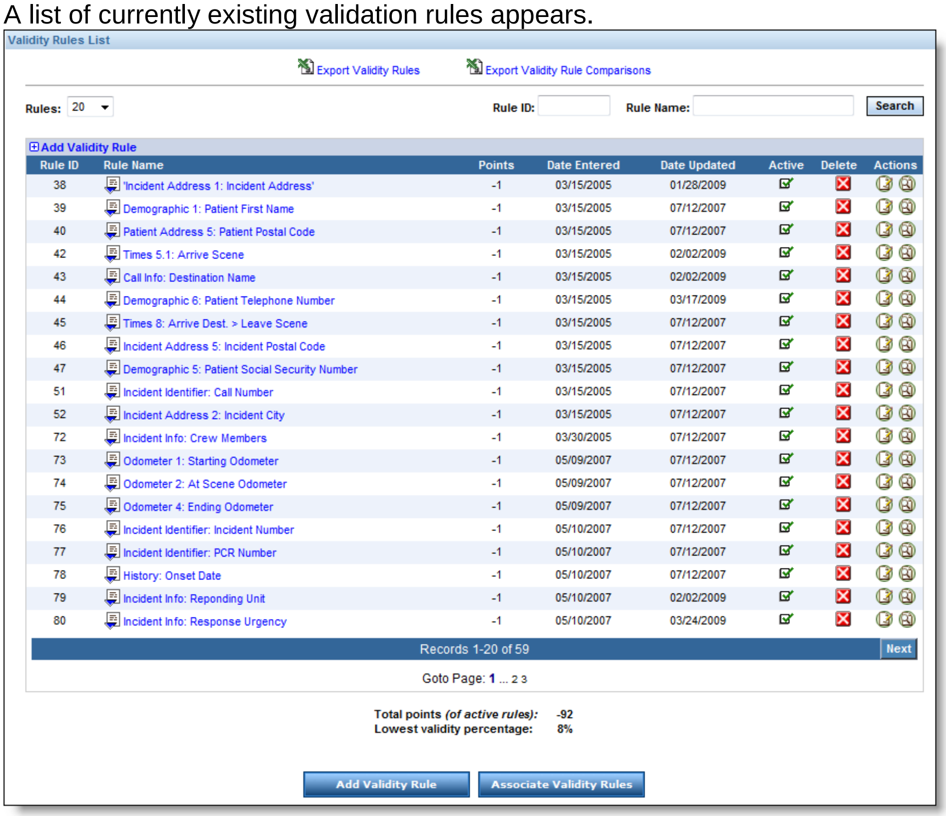
6.2 Overview of Validation

Points and rules to set up validation of EMS run forms can be assigned by the system administrator. These rules can be edited or new rules can be created. Each point taken off a report subtracts from a possible validity score of 100%. Depending on the rules and points assigned, the minimum validity score will vary, and should be kept in mind when viewing the validity of run reports.

Editing Existing Validation Rules

You can make changes to any existing validity rule. If you make changes to a validity rule, the new rule will be applied only to new run forms, or any past run form that you open and re-save.

1. From the upper right, click *Admin.*
2. Under *Run forms,* click *Resources.*
   A sub-menu appears.
3. Under *Resources,* click *Validation.*
   A list of currently existing validation rules appears.


Validity Rules List

Export Validity Rules   Export Validity Rule Comparisons

Rules: 20   Rule ID: Rule Name: Search

Add Validity Rule

Rule ID	Rule Name	Points	Date Entered	Date Updated	Active	Delete	Actions
38	'Incident Address 1: Incident Address'	-1	03/15/2005	01/28/2009			
39	Demographic 1: Patient First Name	-1	03/15/2005	07/12/2007			
40	Patient Address 5: Patient Postal Code	-1	03/15/2005	07/12/2007			
42	Times 5.1: Arrive Scene	-1	03/15/2005	02/02/2009			
43	Call Info: Destination Name	-1	03/15/2005	02/02/2009			
44	Demographic 6: Patient Telephone Number	-1	03/15/2005	03/17/2009			
45	Times 8: Arrive Dest. > Leave Scene	-1	03/15/2005	07/12/2007			
46	Incident Address 5: Incident Postal Code	-1	03/15/2005	07/12/2007			
47	Demographic 5: Patient Social Security Number	-1	03/15/2005	07/12/2007			
51	Incident Identifier: Call Number	-1	03/15/2005	07/12/2007			
52	Incident Address 2: Incident City	-1	03/15/2005	07/12/2007			
72	Incident Info: Crew Members	-1	03/30/2005	07/12/2007			
73	Odometer 1: Starting Odometer	-1	05/09/2007	07/12/2007			
74	Odometer 2: At Scene Odometer	-1	05/09/2007	07/12/2007			
75	Odometer 4: Ending Odometer	-1	05/09/2007	07/12/2007			
76	Incident Identifier: Incident Number	-1	05/10/2007	07/12/2007			
77	Incident Identifier: PCR Number	-1	05/10/2007	07/12/2007			
78	History: Onset Date	-1	05/10/2007	07/12/2007			
79	Incident Info: Reponding Unit	-1	05/10/2007	02/02/2009			
80	Incident Info: Response Urgency	-1	05/10/2007	03/24/2009			

Records 1-20 of 59   Next

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

Total points *(of active rules)*: -92
Lowest validity percentage: 8%

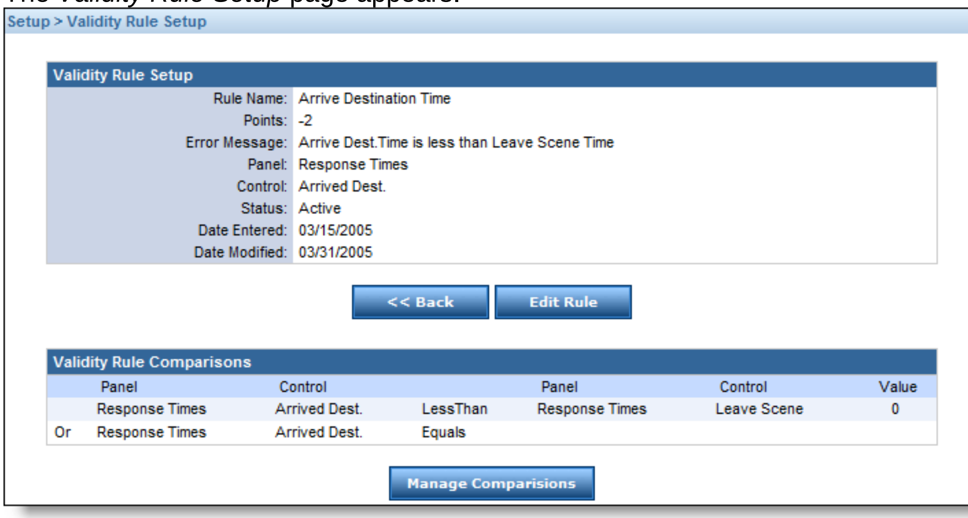
Add Validity Rule   Associate Validity Rules

4. Click the validation rule to be edited.

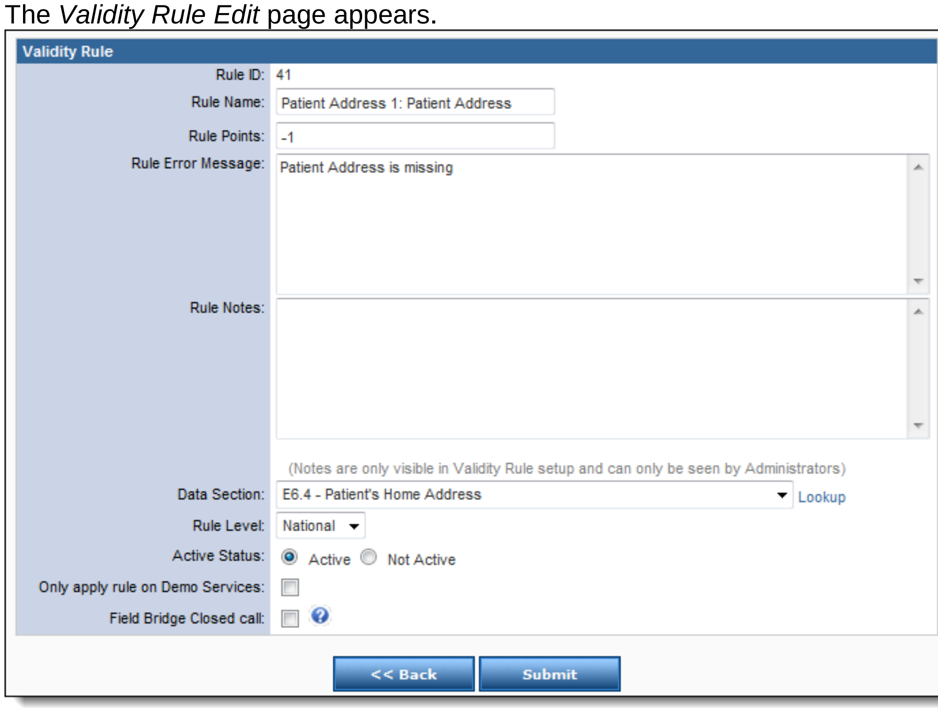
   HINTS:

   If you would prefer to go directly to the *Edit Rule* page, click the *Edit Rule* icon .
   If you would prefer to go directly to the *Manage Comparisons* page, click the *Manage Comparisons* icon .

   The *Validity Rule Setup* page appears.

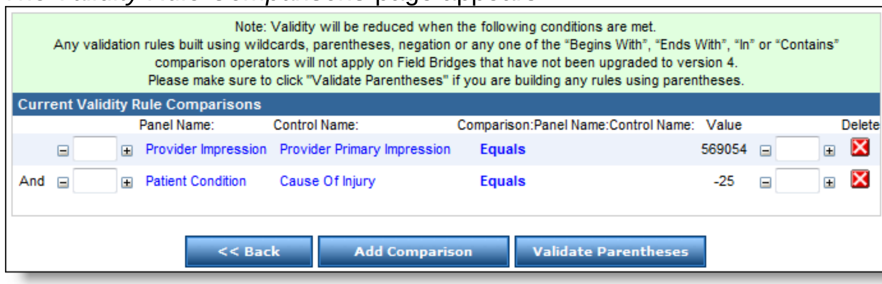


5. To change the name, number of points, message, status, position or the field to which the rule is applied,
   a. Click *Edit Rule.*
      The *Validity Rule Edit* page appears.



   b. Using the provided fields, enter the new desired information.
   c. Click *Submit.*
6. To change the values against which the run form will be compared to determine whether the response is valid by adding a new comparison criteria,

a. From the *Validity Rule Setup* page, click *Manage Comparisons.*
The *Validity Rule Comparisons* page appears.



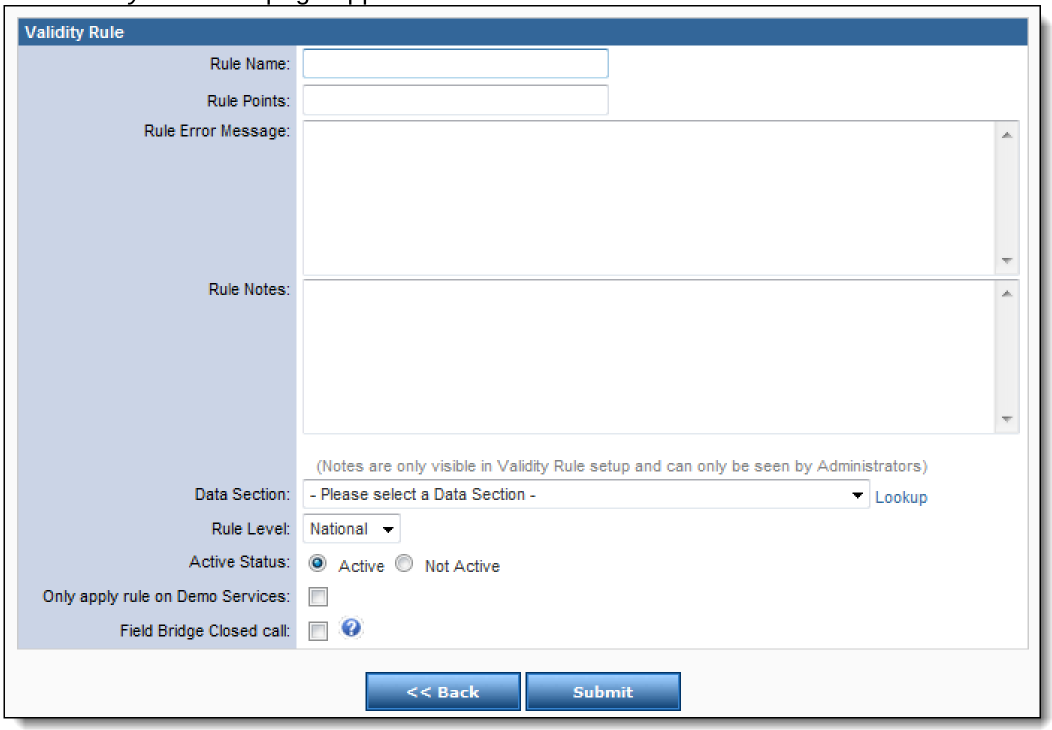
b. From the *Previous Comparison Operator* drop down menu, select whether the rule should be applied when this criteria is met in addition to the other criteria (i.e., and) or when only one of the criteria is met (i.e., or).
c. In the *Panel* and *Control* drop down menus, select the section and sub-section of the run form that this rule should be applied to.
d. In the *Comparison Operator* drop down menu, select how the value in the run form should relate to the selected criteria.
e. In the remaining fields, select the values to which the run form values should be compared.
NOTE: These fields will differ depending on the comparison being created.
f. When finished, click *Add Comparison.*
g. **OPTIONAL:** If multiple comparisons are being used, to make sure they work together and all parentheses were closed, click *Validate Parentheses.*

Adding New Validation Rules

System administrators can add new validation rules for their run forms.

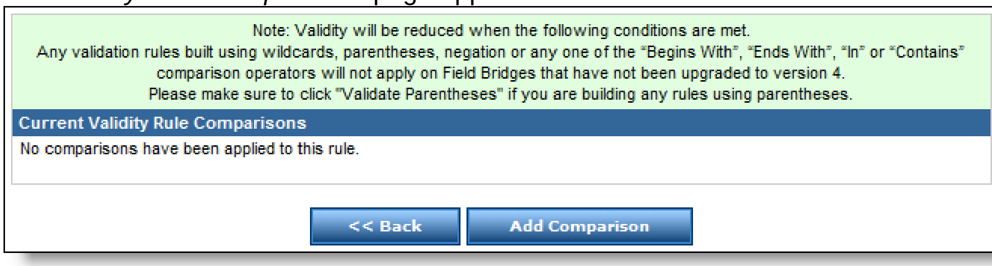
1. From the upper right, click *Admin.*
2. Under *Run forms,* click *Resources.*
   A sub-menu appears.
3. Under *Resources,* click *Validation.*
   A list of currently existing validation rules appears.

4. Click *Add Validation Rule.*
   The *Validity Rule Edit* page appears.

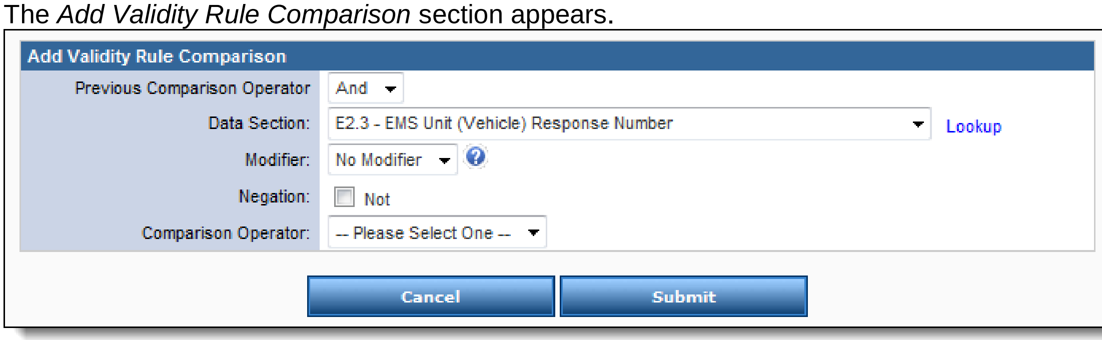


5. In the *Rule Name* text box, type a title for the rule.
6. In the *Rule Points* text box, type the number of points that can be taken away if the criteria for this rule are not met.
   HINT: This number must be negative.
7. In the *Rule Error Message* text box, type any information that should appear at the top of the run form tab to explain why validity points were lost when the rule is not met.
8. In the *Rule Notes* text box, type any additional notes or information to be available to administrators in the setup for this rule.
   NOTE: This information will not be visible to anyone filling out run forms, but can be an easy way to add extra information for administrators to refer to.
9. From the *Data Section* drop down menu, select the data section that this rule should be applied to.
   OR
   To search for the desired data section,
   a. Click the *Lookup* link.
      The *Data Section Lookup* dialog box appears.
   b. In the *Search* text box, type the name or part of the name of the data section.
   c. Click *Search.*
      A list of all data sections matching your search criteria appears.
   d. Select the desired data section.
      The section is selected in the drop down menu.
10. From the *Rule Level* drop down menu, select the level at which this requirement was made.
11. In the *Active Status* section, select whether this rule should be active or inactive in the system.
12. **OPTIONAL:** To make this rule active only for services that are marked as demo services in their setup, select the *Only apply rule on Demo Services* checkbox.
    HINT: This can be a good way to test your validity rules before implementing them for the entire service.

13. **OPTIONAL:** To mark this rule as something that must be met for calls on the Field Bridge before the run form can be submitted, select the *Field Bridge Closed Call* checkbox.
14. Click *Submit.*
    The *Validity Rule Comparisons* page appears.



15. Click *Add Comparison.*
    The *Add Validity Rule Comparison* section appears.



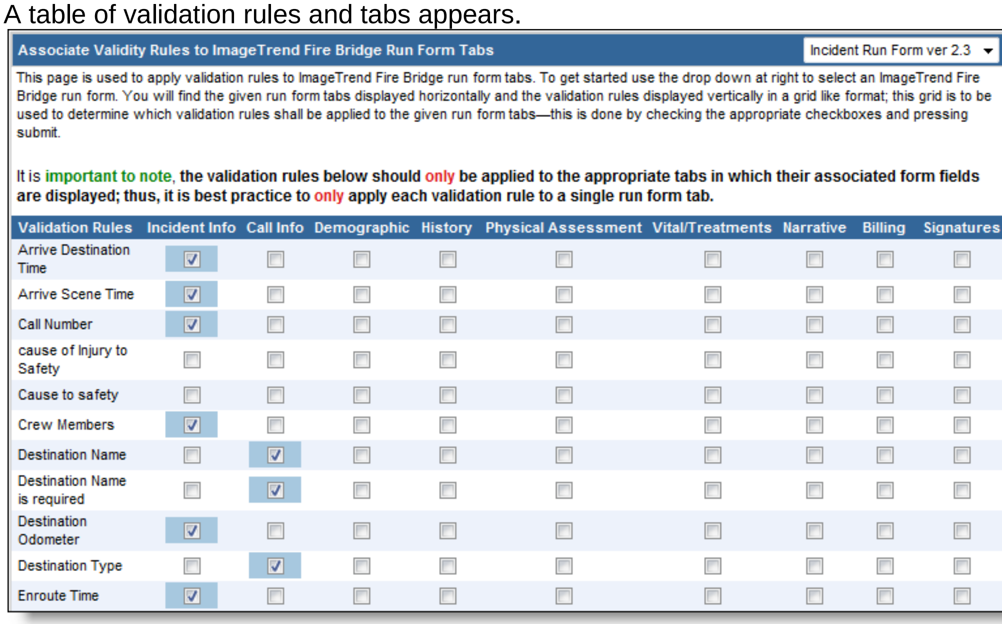
16. From the *Data Section* drop down menu, select the data section that this comparison should be applied to.
    OR
    To search for the desired data section,
    a. Click the *Lookup* link.
       The *Data Section Lookup* dialog box appears.
    b. In the *Search* text box, type the name or part of the name of the data section.
    c. Click *Search.*
       A list of all data sections matching your search criteria appears.
    d. Select the desired data section.
       The section is selected in the drop down menu.
17. In the *Modifier* drop down menu, select how the value in the run form should relate to the selected criteria.
18. To set a comparison where the desired value is not in a specific set, select the *Not* checkbox.
19. In the remaining fields, select the values or fields that the run form value should be compared to.
    NOTES:
    These fields will change depending on the comparison being made.
    You can include wildcards within comparison rules to find a broader range of values if your Field Bridge systems are upgraded to version 4 or above.
20. When finished, click *Add Comparison.*
21. Repeat steps 15–20 until all comparison criteria have been added.
22. **OPTIONAL:** If you have added multiple comparisons and grouped them together with parentheses, to ensure that you have all needed opening and closing parenthesis, click *Validate Parentheses.*

Applying Validation Rules to Run Forms

In order for validation rules to be effective, they must be associated with the run form tab containing the field that collects the information being evaluated. Each rule should only be associated with a single run form tab in each run form.

You will only need to associate validity rules to standard run forms that you are using. The rules will be automatically applied to all dynamic run forms.

1. From the upper right, click *Admin.*
2. Under *Run forms,* click *Resources.*
   A sub-menu appears.
3. Under *Resources,* click *Validation.*
   A list of currently existing validation rules appears.
4. From the bottom of the page, click *Associate Validity Rules.*
5. In the *Select a run form* drop down menu in the upper right corner of the page, select the run form to which to apply this rule.
   The *Associate Validity Rules to ImageTrend EMS Service Bridge Run Form Tabs* page appears.
6. From the drop down menu in the upper right, select the first run form to apply validation rules to.
   A table of validation rules and tabs appears.



Associate Validity Rules to ImageTrend Fire Bridge Run Form Tabs Incident Run Form ver 2.3

This page is used to apply validation rules to ImageTrend Fire Bridge run form tabs. To get started use the drop down at right to select an ImageTrend Fire Bridge run form. You will find the given run form tabs displayed horizontally and the validation rules displayed vertically in a grid like format; this grid is to be used to determine which validation rules shall be applied to the given run form tabs—this is done by checking the appropriate checkboxes and pressing submit.

It is important to note, **the validation rules below should only be applied to the appropriate tabs in which their associated form fields are displayed; thus, it is best practice to only apply each validation rule to a single run form tab.**

Validation Rules	Incident Info	Call Info	Demographic	History	Physical Assessment	Vital/Treatments	Narrative	Billing	Signatures
Arrive Destination Time	✓								
Arrive Scene Time	✓								
Call Number	✓								
cause of Injury to Safety									
Cause to safety									
Crew Members	✓								
Destination Name		✓							
Destination Name is required		✓							
Destination Odometer	✓								
Destination Type		✓							
Enroute Time	✓								

7. From the list of validation rules, select the checkboxes for all rules that should be applied to the tab.
8. Click *Submit.*

6.3 Overview of Destinations

Run forms contain a field for destination. When system administrators set up destinations, staff members can select the correct destination and all address information will be automatically completed. Destinations can be within the United States or in Canada or Mexico, and can be a specific location (e.g., St. Mary's Hospital) or a general location that will allow the address to be completed on the run form (e.g., other hospital). Administrators can create or edit these destinations and their information.

Viewing and Editing Destinations

Administrators can view a list of all existing destinations and edit their information, if necessary.

1. From the upper right, click *Admin.*
2. Under *Run Forms,* click *Resources.*
   A sub-menu appears.
3. Under *Resources,* click *Destinations.*
   A list of existing destinations appears.

	Order	Name	Code	City	County	State	Postal Code	Active
edit		Denver Health	333456	DENVER	DENVER	CO	80204	☑
edit		Penrose St Francis Hospital	333654879	COLORADO SPRINGS	EL PASO	CO	80907	☑
edit		St Anthony Central Hospital	3331236	DENVER	DENVER	CO	80204	☑
edit		St. Anthony Summit Medical Center	3339514	Frisco	Summit	CO	80443	☑
edit		St. Mary-Corwin Medical Center	33345678	PUEBLO	PUEBLO	CO	81004	☑
edit		The Childrens Hospital	333987	DENVER	DENVER	CO	80218	☑
edit	1	*AMF Locationsss	123456789	Minneapolis	Hennepin	MN	55409	☑
edit	2	*ImageTrend/Lakeville Hospital	1312			Minnesota		☑
edit	3	Amie Holt Care Center	80003	Buffalo		Wyoming		☑
edit	4	Aspen Winds	80046	Cheyenne		Wyoming		☑
edit	5	Banner Desert	989778899	TEMPE	MARICOPA	AZ	85282	☑
edit	6	Banner Health	5656345632	Mesa	Maricopa	AZ	85206	☑
edit	7	Bannock Regional Medical Center	93003	Pocatello		Idaho		☑
edit	8	Bear Lake Memorial Hospital	93005	Montpelier		Idaho		☑
edit	9	Belle Fourche Health Care Ctr	91002	Belle Fourche		South Dakota		☑
edit	10	Big Piney Clinic	10039	Marbleton		Wyoming		☑
edit	11	Black Hills Rehabilitation Hosp.	91010	Rapid City		South Dakota		☑

4. To find the correct destination, if necessary, use the *Previous* and *Next* buttons or the alphabet links at the top of the page.
5. To change the sort order of the destinations,
   a. Type the number(s) corresponding to the desired list position for each destination.
   b. From the bottom of the page, click *Update Sort Order.*
6. To view the entire profile or edit a destination, click the destination's name.
7. To edit the destination information, enter the new information into the correct fields and click *OK.*

Creating New Destinations

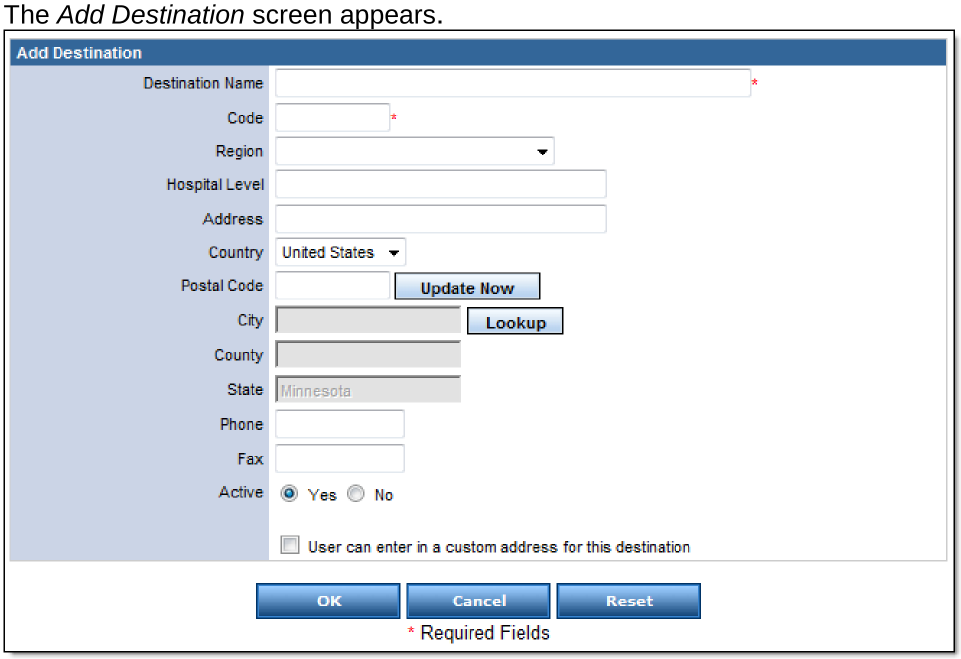
System administrators can create new destinations to be included in the list on run forms.

1. From the upper right, click *Admin.*
2. Under *Run forms,* click *Resources.*
   A sub-menu appears.

3. Under *Resources,* click *Destinations.*
   A list of existing destinations appears.

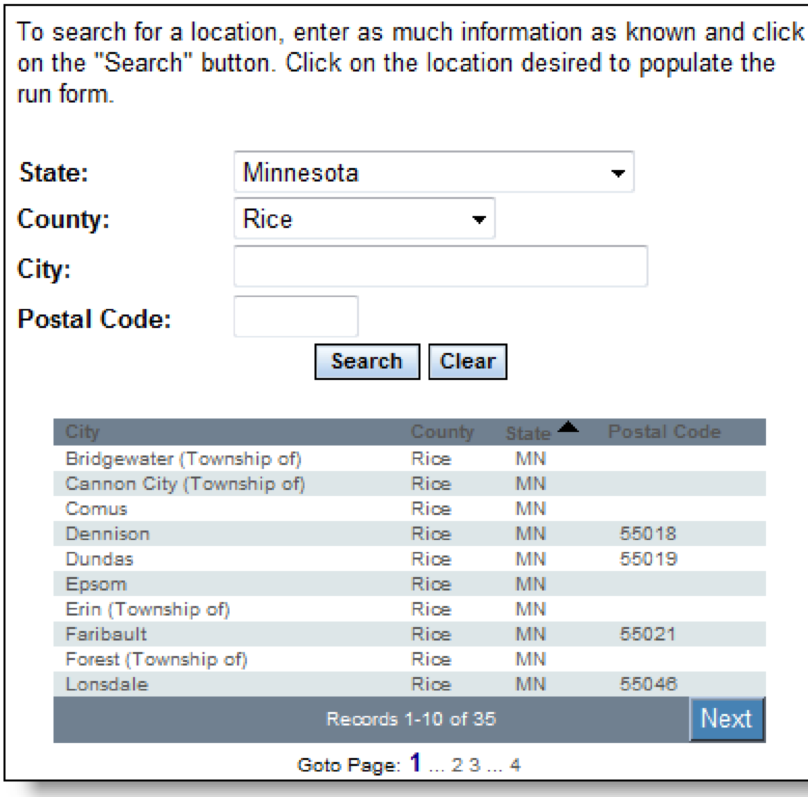
	Order	Name	Code	City	County	State	Postal Code	Active
edit		Denver Health	333456	DENVER	DENVER	CO	80204	
edit		Penrose St Francis Hospital	333654879	COLORADO SPRINGS	EL PASO	CO	80907	
edit		St Anthony Central Hospital	3331236	DENVER	DENVER	CO	80204	
edit		St. Anthony Summit Medical Center	3339514	Frisco	Summit	CO	80443	
edit		St. Mary-Corwin Medical Center	33345678	PUEBLO	PUEBLO	CO	81004	
edit		The Childrens Hospital	333987	DENVER	DENVER	CO	80218	
edit	1	*AMF Locationsss	123456789	Minneapolis	Hennepin	MN	55409	
edit	2	*ImageTrend/Lakeville Hospital	1312			Minnesota		
edit	3	Amie Holt Care Center	80003	Buffalo		Wyoming		
edit	4	Aspen Winds	80046	Cheyenne		Wyoming		
edit	5	Banner Desert	989778899	TEMPE	MARICOPA	AZ	85282	
edit	6	Banner Health	5656345632	Mesa	Maricopa	AZ	85206	
edit	7	Bannock Regional Medical Center	93003	Pocatello		Idaho		
edit	8	Bear Lake Memorial Hospital	93005	Montpelier		Idaho		
edit	9	Belle Fourche Health Care Ctr	91002	Belle Fourche		South Dakota		
edit	10	Big Piney Clinic	10039	Marbleton		Wyoming		
edit	11	Black Hills Rehabilitation Hosp.	91010	Rapid City		South Dakota		

4. From the bottom of the page, click *Add Destination.*
   The *Add Destination* screen appears.



5. In the *Destination Name* text box, type a title for the destination that will appear in the drop down menu on the run form.
6. In the *Code* text box, enter the unique code for the destination provided by ImageTrend.
   NOTE: Be sure to contact ImageTrend for a code to ensure that this destination is entered in the database as a unique record. All destinations within the database must have a unique code in order to work properly.
7. From the *Region* drop down menu, select the region in which this destination is located.
8. For hospitals, in the *Hospital Level* text box, type the hospital level.
9. Using the provided location text boxes, type the destination's address.
   HINT: To automatically enter the city, county and state information from the postal code of the destination, enter the postal code and select the *Check to populate City, County, State from Postal Code* checkbox.
   HINT: To look up address information, click the *Lookup* button, enter as much

information as is known and click *Search.*



10. In the *Phone* and *Fax* text boxes, enter the appropriate contact numbers.
11. To select whether this destination will be active on the run forms or inactive, in the *Active* section, select the appropriate option.
12. If creating a generic destination (e.g., nursing home), to allow users to enter a new address whenever this option is used, select the *User can enter a custom address for this destination* checkbox.
13. To save this new record, click *OK.*

6.4 Overview of Agencies Transferred To/From Setup

Run forms allow users to select an agency for a patient to be transferred to or from. When an agency is set up for use, it can be selected from a drop down for easy form completion.

Viewing and Editing Transferring Agencies

System administrators can view or edit the information for transferring agencies. Records on this list can be selected from a run form.

1. From the upper right, click *Admin.*
2. Under *Run Forms,* click *Resources.*
   A sub-menu appears.

3. Under *Resources,* click *Agency Transferred To/From.*
   A list of existing agency records appears.

Name	Agency ID	City	County	State	Postal Code	Active
edit Jefferson EMS	1851	Saint Cloud	Stearns	MN	56301	☑
edit Kansas City, Kansas Fire Department	1854	Kansas City	Wyandotte	KS	66101	☑
edit Lakeville EMS	1853	Lakeville	Dakota	MN	55044	☐
edit Robertson Fire & Rescue	1852	Burnsville	Dakota	MN	55337	☑

Records 1-4 of 4

Goto Page: ... 1

Add Agency Transferred To/From

4. To view the entire record or to open it for editing, click the name of the record.
5. To edit the record, use the provided fields to make changes and click *OK.*

Adding New Transferring Agencies

System administrators can create new records for agencies not currently in the system. These records will then be available from run forms.

1. From the upper right, click *Admin*.
2. Under *Run Forms*, click *Resources*.
   A sub-menu appears.
3. Under *Resources*, click *Agency Transferred To/From*.
   A list of existing agency records appears.

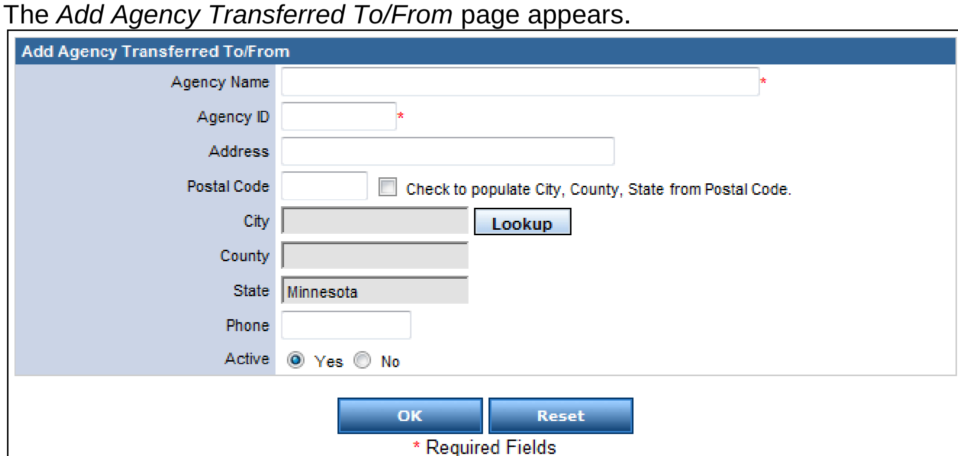
Name	Agency ID	City	County	State	Postal Code	Active
edit Jefferson EMS	1851	Saint Cloud	Stearns	MN	56301	☑
edit Kansas City, Kansas Fire Department	1854	Kansas City	Wyandotte	KS	66101	☑
edit Lakeville EMS	1853	Lakeville	Dakota	MN	55044	☐
edit Robertson Fire & Rescue	1852	Burnsville	Dakota	MN	55337	☑

Records 1-4 of 4

Goto Page: ... 1

Add Agency Transferred To/From

4. Click *Add Agency Transferred To/From.*
   The *Add Agency Transferred To/From* page appears.



5. Use the provided fields to enter information about the agency.
6. When finished, to save the record to the system, click *OK.*

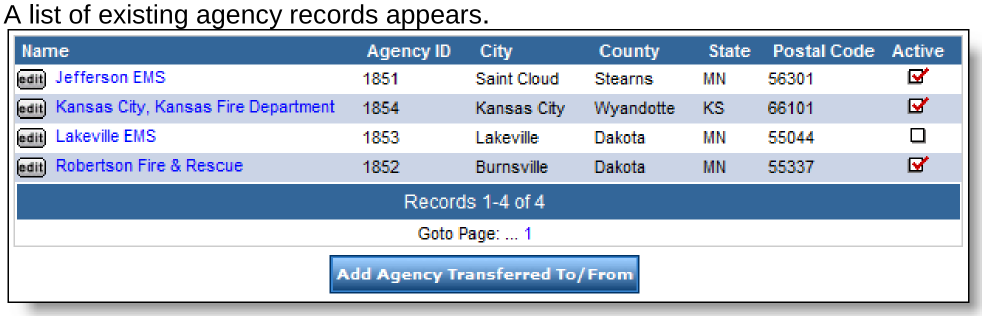
6.5 Working with Mutual Aid Department Records

Each run form displays a list of all departments that can be selected as assisting with the incident. These records include information about the department name, location and contact information, which is automatically filled into a run form when the department is selected. System administrators can view or edit this list, or add a new department.

Viewing and Editing Mutual Aid Department Records

Administrators can view a list of all mutual aid departments and edit their records, if necessary.

1. From the upper right, click *Admin.*
2. Under *Run Forms,* click *Resources.*
   A sub-menu appears.
3. Under *Resources,* click *Agency Transferred To/From.*
   A list of existing agency records appears.



Name	Agency ID	City	County	State	Postal Code	Active
edit Jefferson EMS	1851	Saint Cloud	Stearns	MN	56301	☑
edit Kansas City, Kansas Fire Department	1854	Kansas City	Wyandotte	KS	66101	☑
edit Lakeville EMS	1853	Lakeville	Dakota	MN	55044	☐
edit Robertson Fire & Rescue	1852	Burnsville	Dakota	MN	55337	☑

Records 1-4 of 4

Goto Page: ... 1

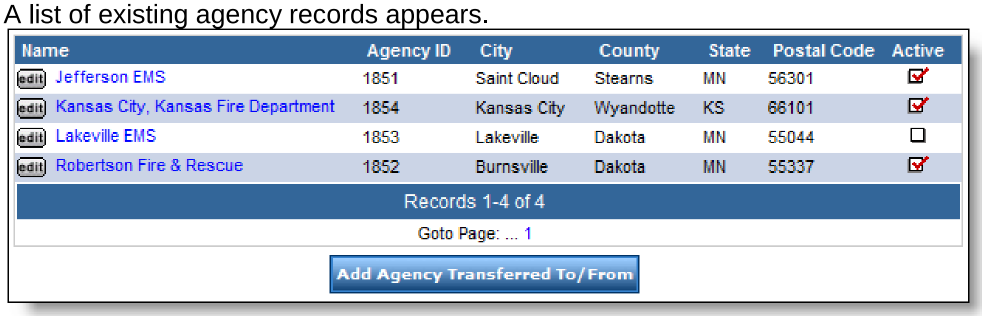
Add Agency Transferred To/From

4. To find the correct department, if necessary, use the *Previous* and *Next* buttons or the alphabet links at the top of the page.
5. To view the entire profile or edit a department, click the department's name.
6. To edit the department information, enter the new information into the correct fields and click *OK.*

Adding Mutual Aid Department Records

System administrators can add new records for mutual aid departments that are not yet in the system.

1. From the upper right, click *Admin.*
2. Under *Run Forms,* click *Resources.*
   A sub-menu appears.
3. Under *Resources,* click *Agency Transferred To/From.*
   A list of existing agency records appears.



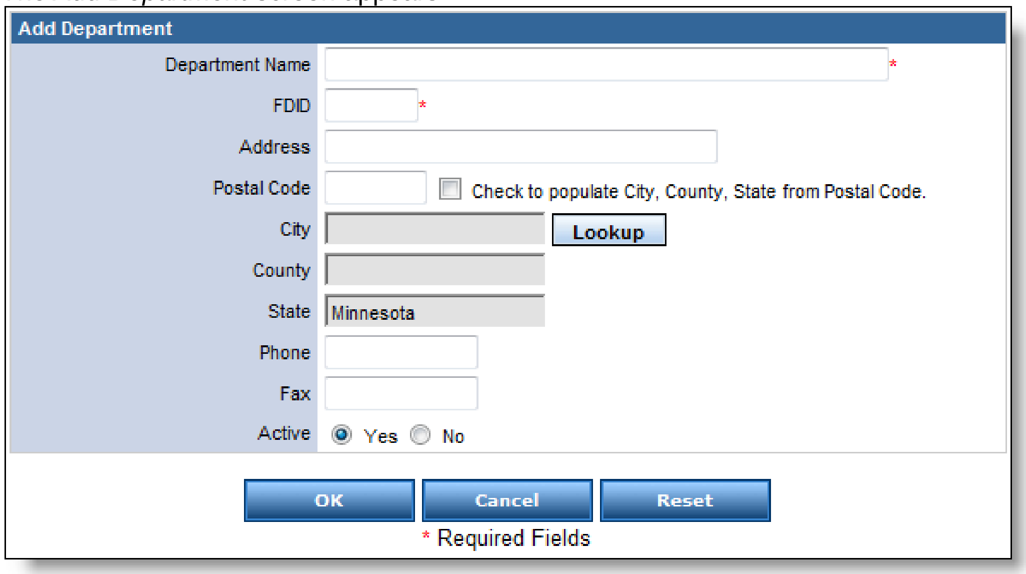
Name	Agency ID	City	County	State	Postal Code	Active
edit Jefferson EMS	1851	Saint Cloud	Stearns	MN	56301	☑
edit Kansas City, Kansas Fire Department	1854	Kansas City	Wyandotte	KS	66101	☑
edit Lakeville EMS	1853	Lakeville	Dakota	MN	55044	☐
edit Robertson Fire & Rescue	1852	Burnsville	Dakota	MN	55337	☑

Records 1-4 of 4

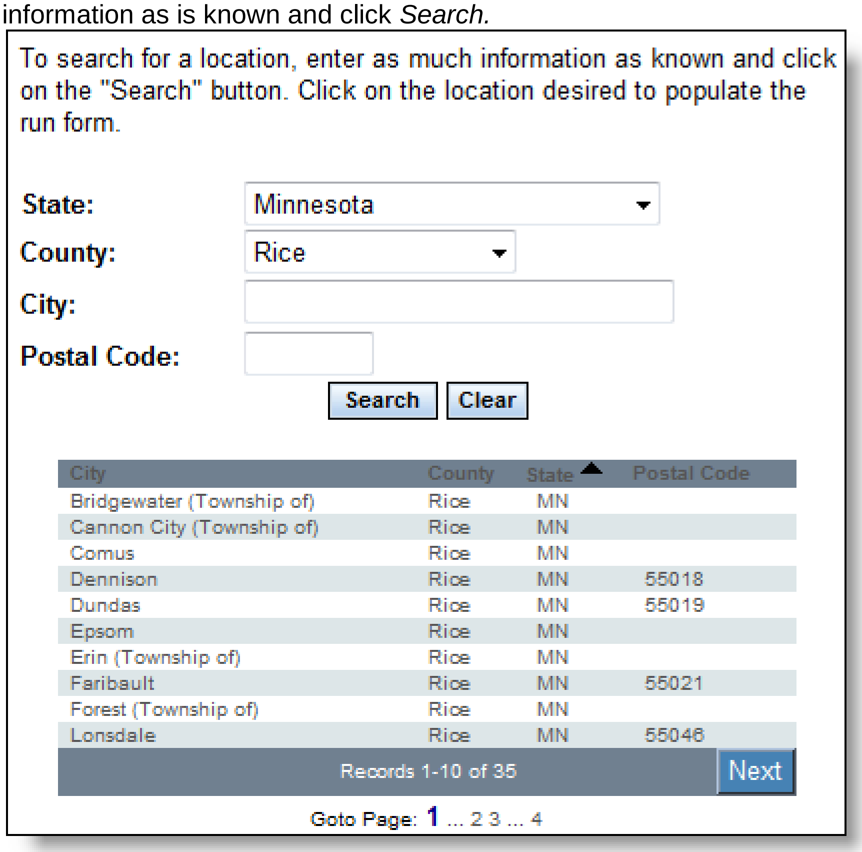
Goto Page: ... 1

Add Agency Transferred To/From

4. Click *Add Department.*
   The *Add Department* screen appears.



5. In the *Department Name* text box, type a name for the mutual aid department.
6. In the *FDID* text box, type that department's fire department ID.
7. Using the provided location text boxes, type the destination's address.
   HINT: To automatically enter the city, county and state information based on the postal code of the destination, enter the postal code and select the *Check to populate City, County, State from Postal Code* checkbox.
   HINT: To look up address information, click the *Lookup* button, enter as much information as is known and click *Search.*



8. In the *Phone* and *Fax* text boxes, enter the appropriate contact numbers.
9. To select whether this department will be active on the run forms or inactive, in the *Active* section, select the appropriate option.
10. To save this new record, click *OK.*

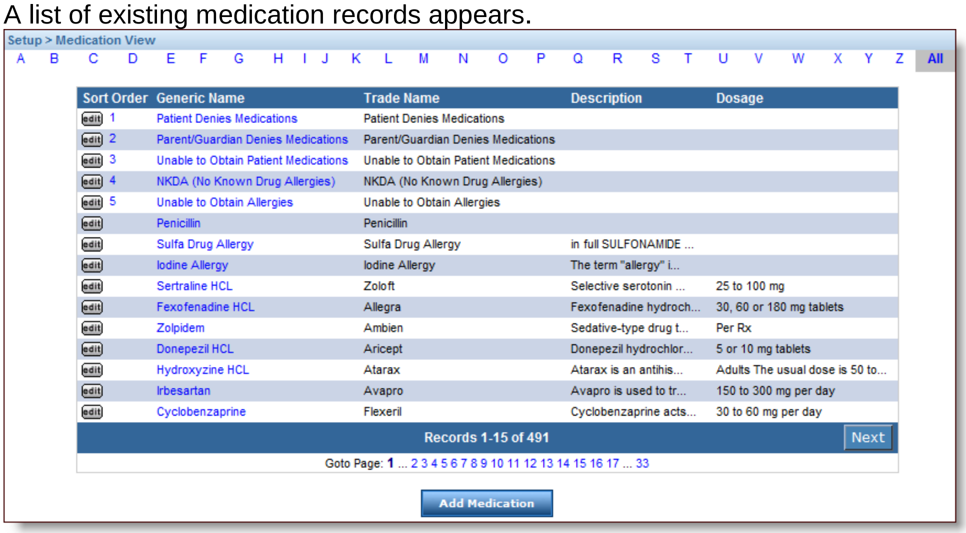
6.6 Working with Patient Medication Records

EMS run reports allow staff members to keep record medications that patients are given. These medications can be selected from a list, which is set in this section by the system administrator. All medications that can be recorded should be included in this list.

Viewing and Editing Medication Records

System administrators can view or edit a list of existing medication records. Records in this list can be selected from a run form.

1. From the upper right, click *Admin.*
2. Under *Run Forms,* click *Resources.*
   A sub-menu appears.
3. Under *Resources,* click *Patient Medication List.*
   A list of existing medication records appears.


Setup > Medication View

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 All

Sort Order	Generic Name	Trade Name	Description	Dosage
edit 1	Patient Denies Medications	Patient Denies Medications		
edit 2	Parent/Guardian Denies Medications	Parent/Guardian Denies Medications		
edit 3	Unable to Obtain Patient Medications	Unable to Obtain Patient Medications		
edit 4	NKDA (No Known Drug Allergies)	NKDA (No Known Drug Allergies)		
edit 5	Unable to Obtain Allergies	Unable to Obtain Allergies		
edit	Penicillin	Penicillin		
edit	Sulfa Drug Allergy	Sulfa Drug Allergy	in full SULFONAMIDE ...	
edit	Iodine Allergy	Iodine Allergy	The term "allergy" i...	
edit	Sertraline HCL	Zoloft	Selective serotonin ...	25 to 100 mg
edit	Fexofenadine HCL	Allegra	Fexofenadine hydroch...	30, 60 or 180 mg tablets
edit	Zolpidem	Ambien	Sedative-type drug t...	Per Rx
edit	Donepezil HCL	Aricept	Donepezil hydrochlor...	5 or 10 mg tablets
edit	Hydroxyzine HCL	Atarax	Atarax is an antihis...	Adults The usual dose is 50 to...
edit	Irbesartan	Avapro	Avapro is used to tr...	150 to 300 mg per day
edit	Cyclobenzaprine	Flexeril	Cyclobenzaprine acts...	30 to 60 mg per day

Records 1-15 of 491 Next

Goto Page: 1 ... 2 3 4 5 6 7 8 9 10 11 12 13 14 15 16 17 ... 33

Add Medication

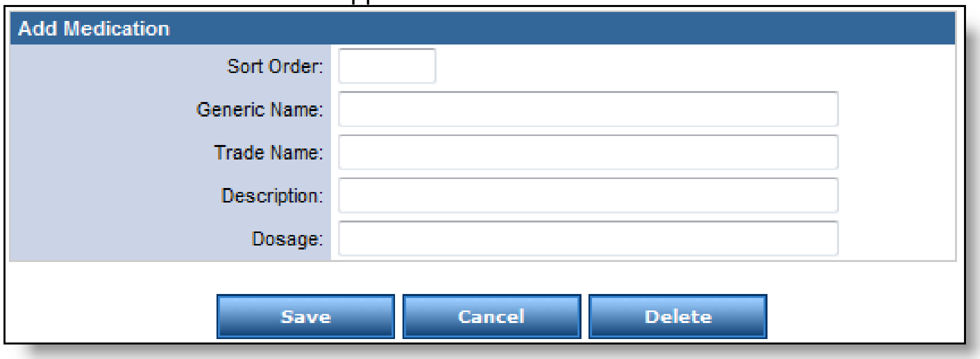
4. To find the correct medication, if necessary, use the *Previous* and *Next* buttons or the alphabet links at the top of the page.
5. To view the entire profile or edit a medication, click the medication's name.
6. To edit the medication information, enter the new information into the correct fields and click *OK.*

Adding Medication Records

System administrators can add new records for medications that are not yet in the system.

1. From the upper right, click *Admin.*
2. Under *Run Forms,* click *Resources.*
   A sub-menu appears.
3. Under *Resources,* click *Patient Medication List.*

4. Click *Add Medication.*
   The *Add Medication* screen appears.



5. In the *Generic Name* text box, type the medication's generic name.
6. In the *Trade Name* text box, type the medication's trade name.
7. In the *Description* text box, type more information about the medication.
8. In the *Dosage* test box, type the amount of this medication that should be taken.
   NOTE: This dosage will be entered into run forms as the default value.
9. To place this medication at a certain position in the list, in the *Sort Order* test box, type the number of the position in which this medication should appear.
10. When finished, to add this record to the system, click *Save.*

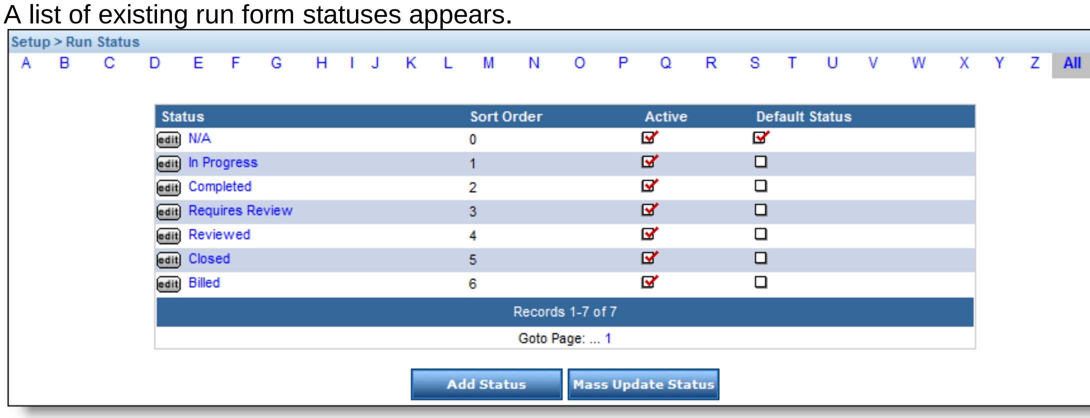
6.7 Working with Run Form Statuses

Run forms can be marked with particular statuses to indicate any additional work that needs to be done or to help sort records. In this section, system administrators can view, edit and set up these statuses. Once statuses have been changed, system administrators can also choose to apply those changes to all affected past records.

Viewing and Editing Run Form Statuses

System administrators can view a list of all possible run form statuses and edit individual statuses if necessary.

1. From the upper right, click *Admin.*
2. Under *Run Forms,* click *Resources.*
   A sub-menu appears.
3. Under *Resources,* click *Run Status.*
   A list of existing run form statuses appears.



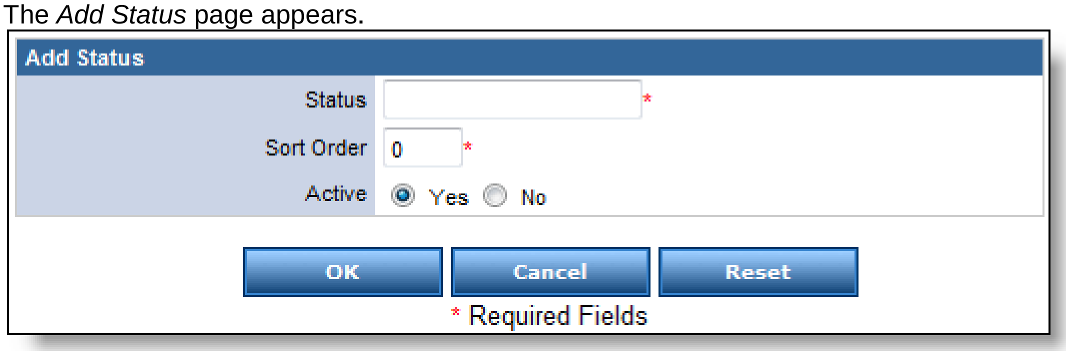
4. To find the correct status, if necessary, use the *Previous* and *Next* buttons or the alphabet links at the top of the page.
5. To view the entire profile or edit a status, click its name.

6. To edit the status information, enter the new information into the correct fields and click *OK.*

Creating New Statuses

System administrators can create new statuses by which to classify their run forms.

1. From the upper right, click *Admin.*
2. Under *Run Forms,* click *Resources.*
   A sub-menu appears.
3. Under *Resources,* click *Run Status.*
   A list of existing run form statuses appears.
4. Click *Add Status.*
   The *Add Status* page appears.



5. In the *Status* text box, type the status.
6. In the *Sort Order* text box, type the number of the position in the list of statuses that this status should appear.
7. To select whether this status should be active in the system or inactive, in the *Active* section, select the appropriate option.
8. When finished, to save the new status, click *OK.*
   The new status will not be available for new run forms.

Updating Statuses for Past Run Reports

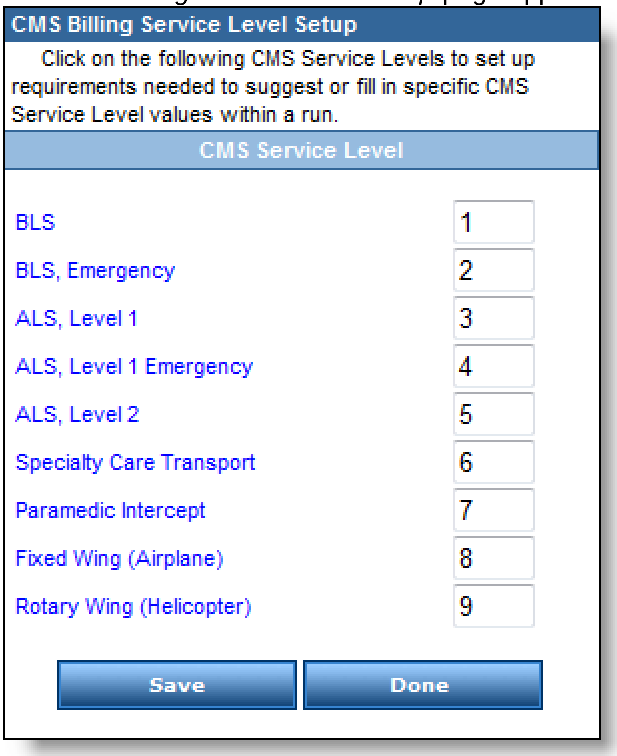
Once a status has been edited or if a new status is added, past run reports can be altered to reflect these changes. Any status can be selected to be replaced by a different status, and all past run reports with the selected original status will be updated to the new status.

1. From the upper right, click *Admin.*
2. Under *Run Forms,* click *Resources.*
   A sub-menu appears.
3. Under *Resources,* click *Run Status.*
4. Edit or add the desired status.
5. Click *Mass Update Status.*
6. From the *From* drop down menu, select the original status that should be replaced.
7. From the *To* drop down menu, select the new status that should replace the original status.
8. Click *Submit.*
   The changes are applied.

6.8 Working with the CMS Billing Calculator

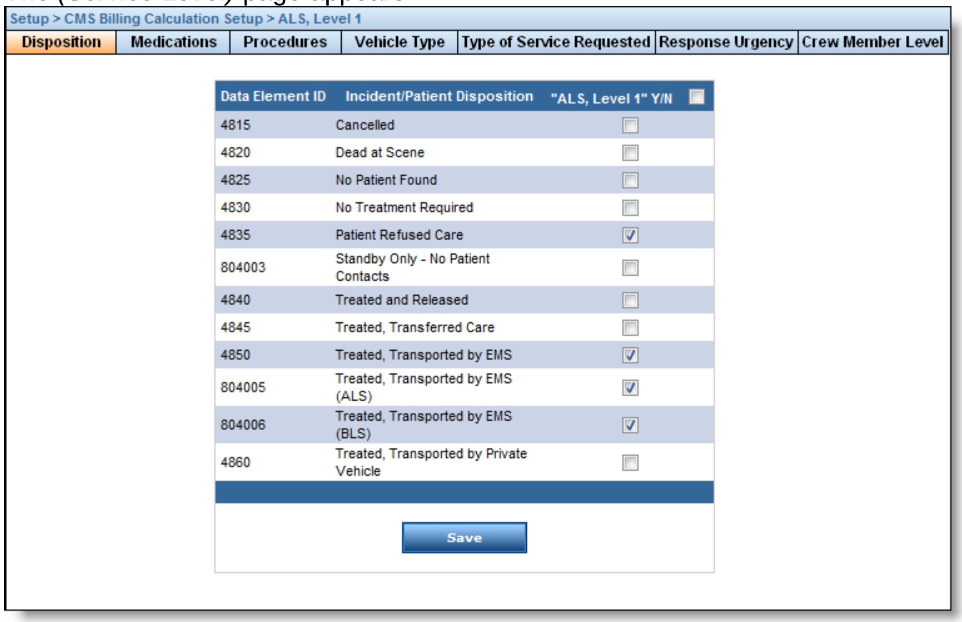
The CMS Billing Calculator setup allows administrators to indicate what services they can bill for under each CMS service level. This information will be used in the CMS Billing Calculator, if enabled.

1. From the upper right, click *Admin.*
2. Under *Run Forms,* click *Resources.*
   A sub-menu appears.
3. Under *Resources,* click *CMS Billing Calculations.*
   The *CMS Billing Service Level Setup* page appears.



4. To change the sort order of the service levels, in the text boxes, type the desired sort order for each level.
   NOTE: This order is based on national conventions. ImageTrend recommends not changing this order without consulting an expert on this billing system to avoid errors in billing.
5. When finished, click *Save.*
6. To indicate what services can be billed for,

a. Click the level for which to set up billed services.
   The *(Service Level)* page appears.



b. To indicate that a service should be billed, select the checkbox.
   To indicate that a service should not be billed, deselect the checkbox.
c. When finished, click *Save.*
d. To select additional services under this level, click the desired tab.
e. Repeat steps b–d for each tab.

7. Use the left menu to navigate back to the list of CMS service levels.
8. Repeat steps 6–7 for all desired service levels.

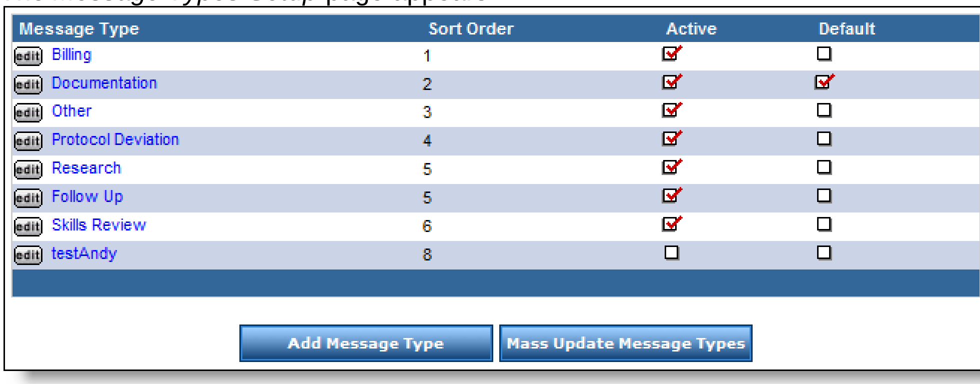
6.9 Working with Message Types

Message types allow you to categorize messages sent with the State Bridge inbox for easier organization. System administrators can add or edit message types for use with the inbox. Once a type has been edited or if a new type is added, past messages can be altered to reflect these changes. Any type can be selected to be replaced by a different type, and all past messages with the selected original status will be updated to the new status.

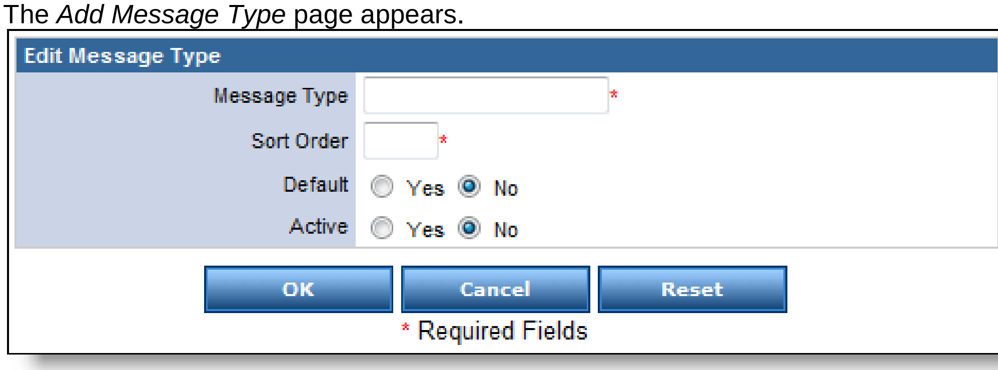
Adding a New Message Type

1. From the upper right, click *Admin.*
2. Under *Run Forms,* click *Resources.*
   A sub-menu appears.

3. Under *Resources,* click *Message Types.*
   The *Message Types Setup* page appears.



4. Click *Add Message Type.*
   The *Add Message Type* page appears.

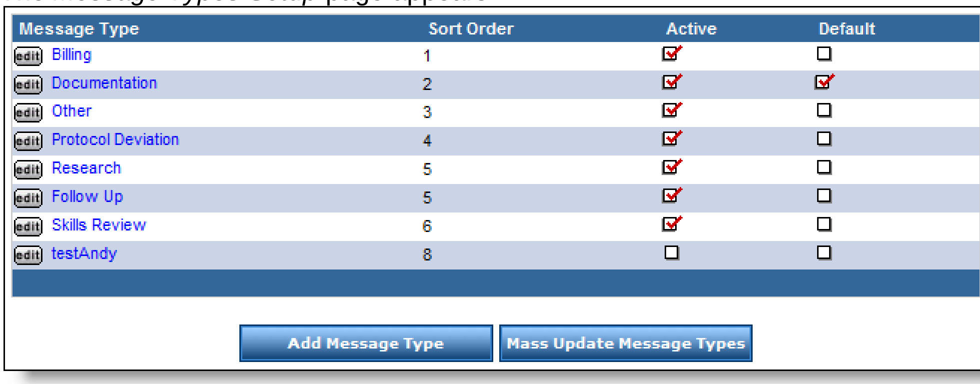


5. In the *Message Type* text box, type the name for the message type.
6. In the *Sort Order* text box, type the order that this type should have in the list of orders.
7. In the *Default* section, select whether this type should be selected by default for new messages.
   HINT: Only one message type can be selected as the default.
8. In the *Active* section, select whether this type should be currently active and available for use.
9. When finished, click *OK.*

Viewing and Editing Existing Message Types

1. From the upper right, click *Admin.*
2. Under *Run Forms,* click *Resources.*
   A sub-menu appears.

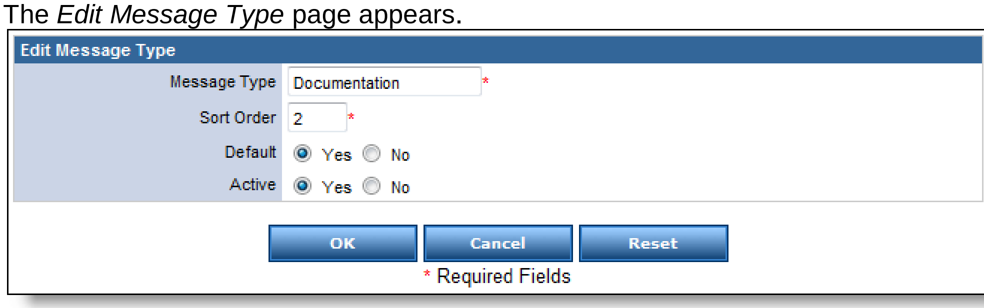
3. Under *Resources,* click *Message Types.*
   The *Message Types Setup* page appears.



Message Type	Sort Order	Active	Default
edit Billing	1	☑	☐
edit Documentation	2	☑	☑
edit Other	3	☑	☐
edit Protocol Deviation	4	☑	☐
edit Research	5	☑	☐
edit Follow Up	5	☑	☐
edit Skills Review	6	☑	☐
edit testAndy	8	☐	☐

Add Message Type | Mass Update Message Types

4. Click the name of the desired message type.
   The *Edit Message Type* page appears.



Edit Message Type

Message Type	Documentation *
Sort Order	2 *
Default	(●) Yes ( ) No
Active	(●) Yes ( ) No

OK | Cancel | Reset

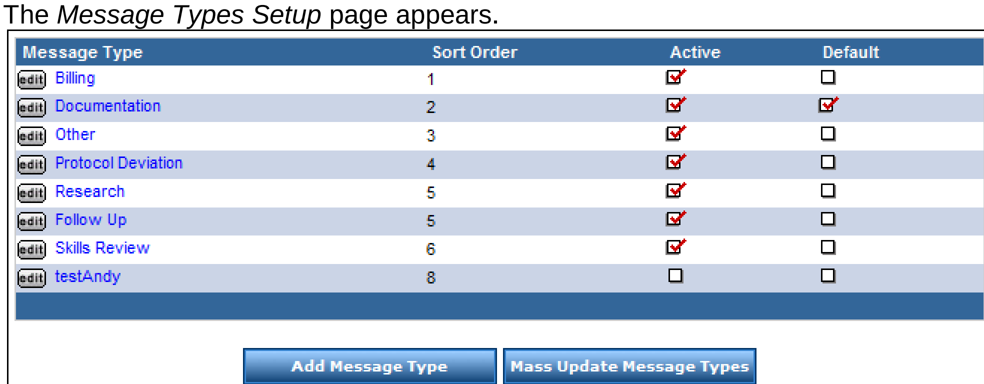
* Required Fields

5. Using the provided fields, make any desired changes.
6. When finished, to save any changes, click *OK.*

Mass Updating Message Types

Administrators can choose to update all messages of a certain type to be categorized as a different type, if desired.

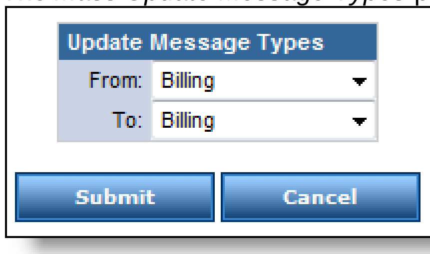
1. From the upper right, click *Admin.*
2. Under *Run Forms,* click *Resources.*
   A sub-menu appears.
3. Under *Resources,* click *Message Types.*
   The *Message Types Setup* page appears.



Message Type	Sort Order	Active	Default
edit Billing	1	☑	☐
edit Documentation	2	☑	☑
edit Other	3	☑	☐
edit Protocol Deviation	4	☑	☐
edit Research	5	☑	☐
edit Follow Up	5	☑	☐
edit Skills Review	6	☑	☐
edit testAndy	8	☐	☐

Add Message Type | Mass Update Message Types

4. Click *Mass Update Message Types.*
   The *Mass Update Message Types* page appears.



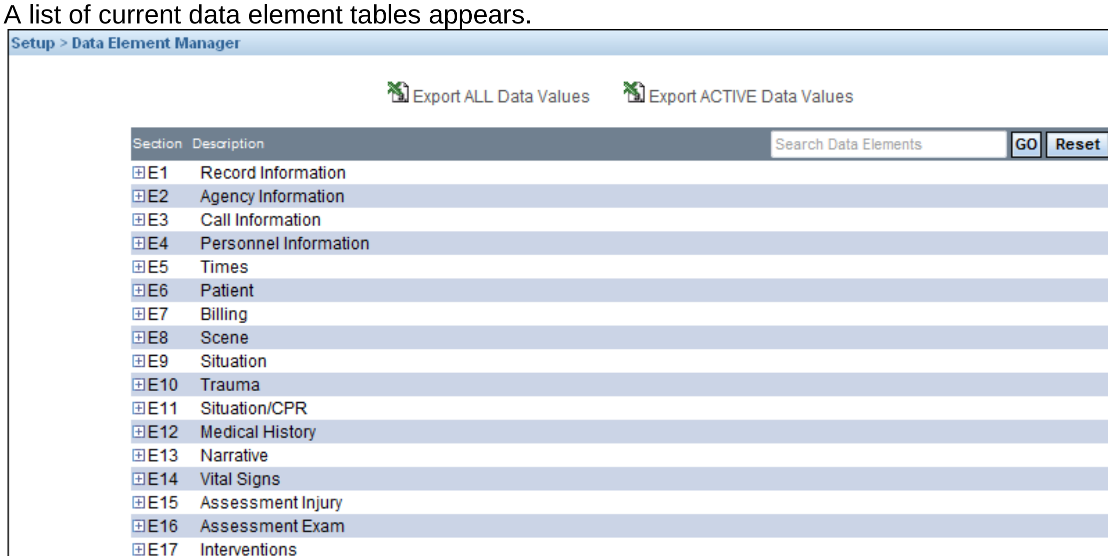
5. From the *From* drop down menu, select the type from which messages should be updated.
6. From the *To* drop down menu, select the type to which messages should be updated.
7. Click *Submit.*
   The message types are updated.

6.10 Viewing Data Element Details

Each type of information that is collected in the State Bridge has its own data element. System administrators can view a variety of information about these elements.

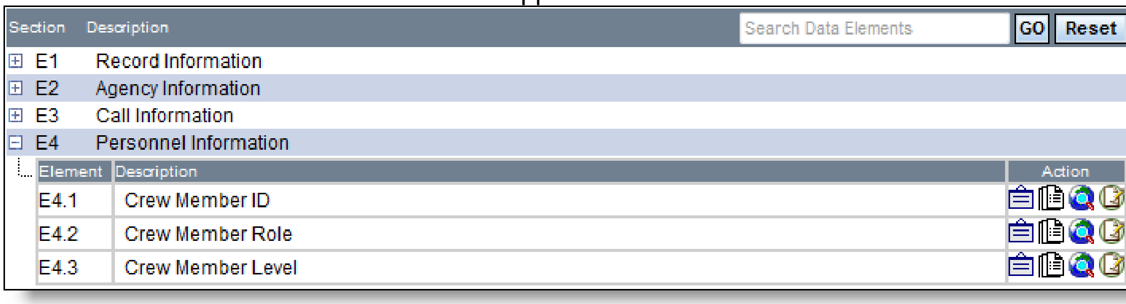
NOTE: Users must be extremely familiar with the database that the application is built upon and the NHTSA and NEMSIS codes in order to change any of this information, so please contact ImageTrend if changes are needed.

1. From the upper right, click *Admin.*
2. Under *Run Forms,* click *Resources.*
   A sub-menu appears.
3. Under *Resources,* click *Data Elements.*
   A list of current data element tables appears.



4. To find a specific table or data element, in the *Search Data Elements* text box, type a keyword and click *Go.*
5. To view the data elements within a particular table, click the corresponding *View (Table Name) Data Elements* icon ⊞.

A list of the data elements within that table appears.



6. To view more information about the data element, click the correct icon.

View Tag Details

Allows administrators access to tag properties, such as the element's name, the date it was modified, its properties (e.g., its location and name in the database or the name of the file collecting the data) and the code used to generate the tag.

View Element Details

Enables administrators to view details for the corresponding data element, such as the table containing the data element, its description and the field name.

View Mapping Details

If connections are set up to import or export data for this element, administrators can view the paths mapped for those data exchanges.

View Resource Values

Administrators have access to a list of all fields that will appear on the run form for this data element, and can choose to mark the field active (to display them on the run form) or inactive (to hide them on the run form), or change the sort order.

Mapping Codes for Exports and Posting

In some cases, the names and codes that your agency uses may be different than those that are used by someone you submit your data to, such as the state or a billing company. In this case, you can "map" the codes so that the system knows to substitute the name and code used by the organization you are exporting to when you perform an export or post your data.

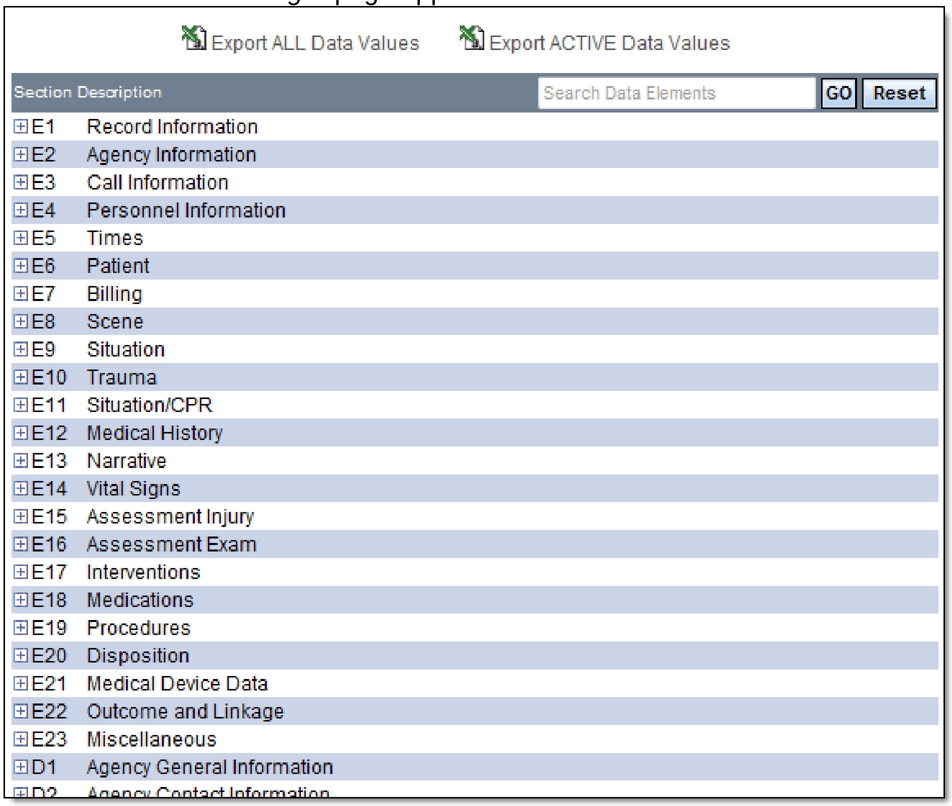
This can be especially useful for items such as destinations. In this case, if the state records a destination by its initials and your service spells out the name, mapping codes can allow you to use the full name within your system but export the initials for the state.

Before you can map any names or codes, you must know both the name and code that your agency uses and the one that you need to export. If necessary, be sure to map both the name and the code for a particular option. The Data Element Manager keeps track of all the codes and names used by your agency, to which you will add the mapping information.

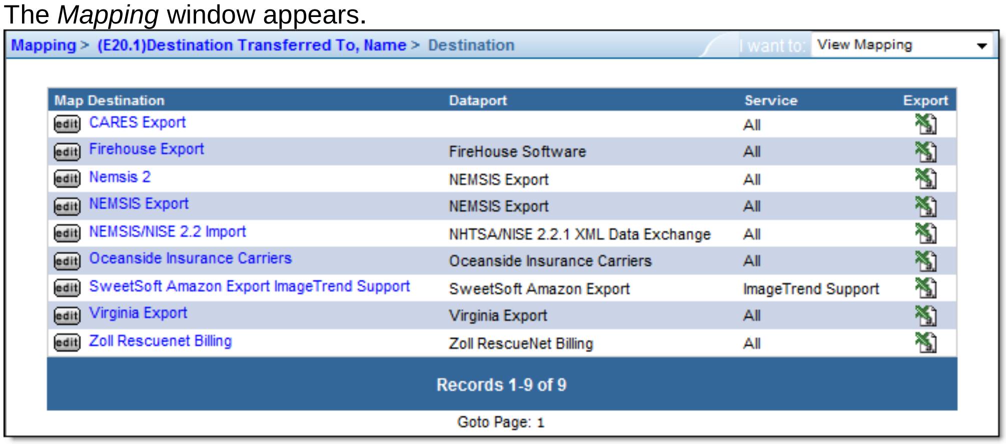
Mappings are created for both a particular data element (e.g., the destination transferred to code) and a particular export set. This allows you to create different mappings for different exports; for example, if you create exports for both a billing company and the state, and they use different codes, you should have an export set for each and map those different codes.

1. From the upper right, click *Admin.*

2. Under *Run Forms,* click *Resources.*
   A sub-menu appears.
3. Under *Resources,* click *Data Elements.*
   The *Data Element Manager* page appears.



4. To locate the code or name that your agency uses that needs to have a mapping, click the *View Information* icons until you locate the desired code.
   OR
   a. In the *Search Data Elements* text box, type a name, code or portion of either.
   b. Click *Go.*
      HINT: If you need to map destinations for transferring, the element IDs you will need are E20.1 and E20.2.
5. For the appropriate element, click the *View Mapping Details* icon .
   The *Mapping* window appears.



6. Click the name of the export set you want to add this mapping to.
   The *Data Sections* page appears.

Data Sections > (E20.1)Destination Transferred To, Name Mapping Destination   I want to: View Mapping

Mapped Code	System Code	Description	Active
	1312	*ImageTrend/Lakeville Hospital	☑
	80003	Amie Holt Care Center	☑
	80046	Aspen Winds	☑
	5656345632	Banner Health	☑
	93003	Bannock Regional Medical Center	☑
	93005	Bear Lake Memorial Hospital	☑
	91002	Belle Fourche Health Care Ctr	☑
	10039	Big Piney Clinic	☑
	91010	Black Hills Rehabilitation Hosp.	☑
	80016	Bonnie Bluejacket Nursing Home	☑
	3333	Boone Medical Center	☑
	866249684	Boswell Hospital	☑
	10010	Campbell County Memorial Hospital	☑
	80042	Canyon Hills Manor	☑

7. For each value that needs to be replaced by a code that the receiving system recognizes, in the corresponding *Mapped Code* text box, type the new value.
8. Repeat step 7 for all values within this data element and export set.
9. When finished, from the bottom of the page, click *Save.*

6.11 Working with Chemical Names

You can set up the chemical names that will be available to select from the run form.

Viewing and Editing Chemical Names

System administrators can view a list of all possible chemical names and edit individual chemicals if necessary.

1. From the upper right, click *Admin.*
2. Under *Run Forms,* click *Resources.*
   A sub-menu appears.

3. Under *Resources,* click *Chemical Names.*
   A list of existing chemical names appears.

Chemical ID	Chemical Name	UN Number	CAS Number	NIOSH File	Active
0139004		1993			
0045002	(Chloromethyl) benzene	1738	100-44-7		
0392001	(Diethylamino) ethane	1296	121-44-8		
0389000	1,1,1-Trichloroethane	2831	71-55-6	npgd0404.html	
0374005	1,1,2,2-Tetrachloroethane	1702	79-34-5		
1715000	1,1,2-Trichloro-1,2,2-trifluoroethane				
1834000	1,1-DCE				
0859000	1,1-Di(tert-butylperoxy)cyclohexane	2179			
0130000	1,1-Dichloroethane	2362	75-34-3		
0408002	1,1-Dichloroethylene	1303	75-35-4	npgd0661.html	
0001003	1,1-Diethoxyethane	1088	105-57-7		
0147001	1,1-Difluoroethane	1030	75-37-6		
0908000	1,1-Difluoroethylene	1959		npgd0662.html	
0238001	1,1-Dimethylethane	1969	75-28-5		
0068002	1,1-Dimethylethyl hydroperoxide		75-91-2		

1-15 of 3,206 | First | Previous | Next | Last   Per Page 15   Page 1

Add New Chemical

4. To find the correct chemical, if necessary, use the *Previous* and *Next* buttons or the *Search* button.
5. To view the entire profile or edit a chemical, click its name.
6. To edit the chemical information, enter the new information into the correct fields and click *OK.*

Creating New Chemical Names

System administrators can create new chemical names as needed.

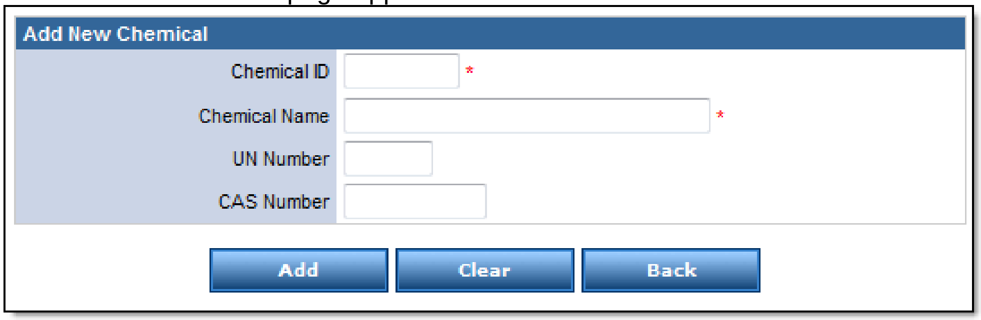
1. From the upper right, click *Admin.*
2. Under *Run Forms,* click *Resources.*
   A sub-menu appears.
3. Under *Resources,* click *Chemical Names.*
   A list of existing chemical names appears.

Chemical ID	Chemical Name	UN Number	CAS Number	NIOSH File	Active
0139004		1993			
0045002	(Chloromethyl) benzene	1738	100-44-7		
0392001	(Diethylamino) ethane	1296	121-44-8		
0389000	1,1,1-Trichloroethane	2831	71-55-6	npgd0404.html	
0374005	1,1,2,2-Tetrachloroethane	1702	79-34-5		
1715000	1,1,2-Trichloro-1,2,2-trifluoroethane				
1834000	1,1-DCE				
0859000	1,1-Di(tert-butylperoxy)cyclohexane	2179			
0130000	1,1-Dichloroethane	2362	75-34-3		
0408002	1,1-Dichloroethylene	1303	75-35-4	npgd0661.html	
0001003	1,1-Diethoxyethane	1088	105-57-7		
0147001	1,1-Difluoroethane	1030	75-37-6		
0908000	1,1-Difluoroethylene	1959		npgd0662.html	
0238001	1,1-Dimethylethane	1969	75-28-5		
0068002	1,1-Dimethylethyl hydroperoxide		75-91-2		

1-15 of 3,206 | First | Previous | Next | Last   Per Page 15   Page 1

Add New Chemical

4. Click *Add New Chemical.*
   The *Add New Chemical* page appears.



5. In the *Chemical ID* text box, type the unique ID for this chemical.
6. In the *Chemical Name* text box, type the chemical's name.
7. In the *Sort Order* text box, type the number of the position in the list of statuses that this status should appear.
8. To select whether this status should be active in the system or inactive, in the *Active* section, select the appropriate option.
9. When finished, to save the new status, click *OK.*
   The new status will not be available for new run forms.

6.12 Overview of Reports and Narratives

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

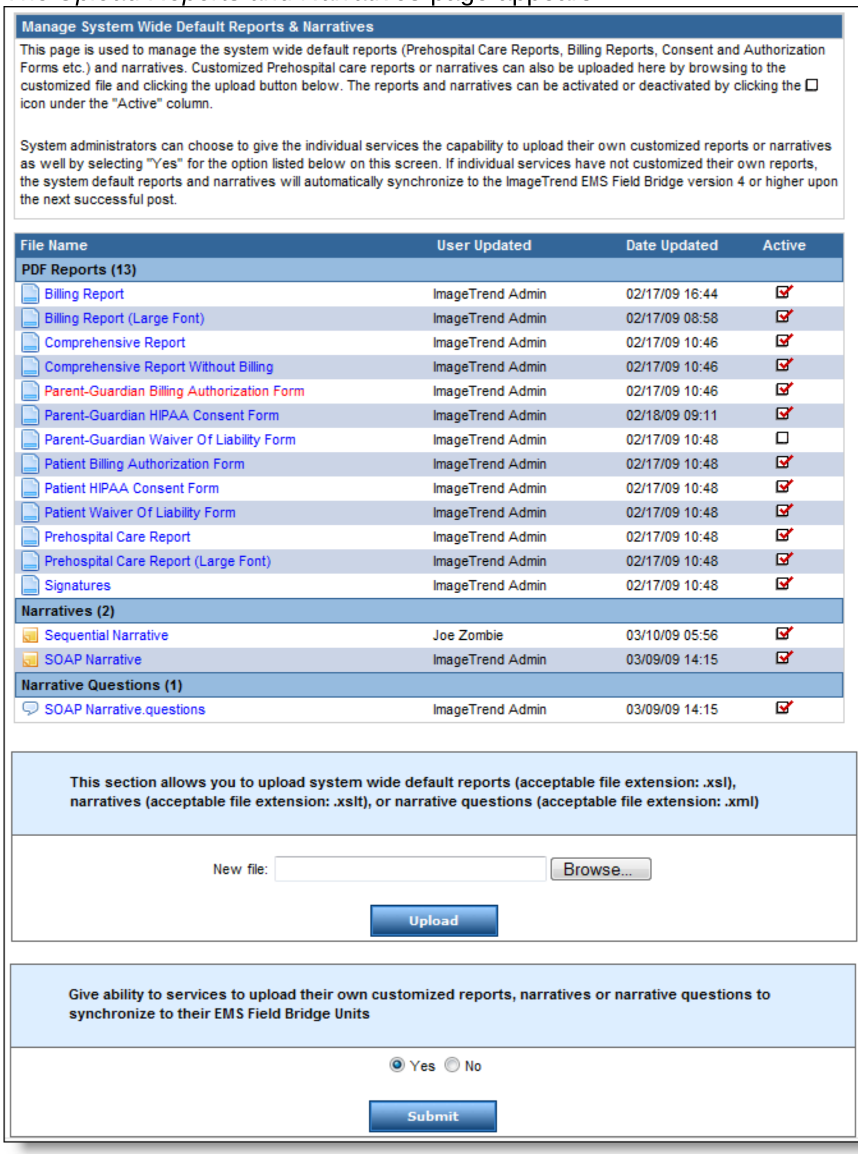
The State Bridge controls the reports and narratives that are available for both the State Bridge system and the Field Bridge system. The reports and narratives available for the State Bridge are by default applied to the Field Bridge list, although that list can be changed in the *Manage Field Bridge Options* section so that different reports and narratives are available from the Field Bridge or the State Bridge.

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, you can deactivate them.

1. From the upper right, click *Admin.*
2. Under *Run Forms,* click *Resources.*
   A sub-menu appears.

3. Under *Resources,* click *Reports and Narratives.*
   The *Upload Reports and Narratives* page appears.



Manage System Wide Default Reports & Narratives

This page is used to manage the system wide default reports (Prehospital Care Reports, Billing Reports, Consent and Authorization Forms etc.) and narratives. Customized Prehospital care reports or narratives can also be uploaded here by browsing to the customized file and clicking the upload button below. The reports and narratives can be activated or deactivated by clicking the ☐ icon under the "Active" column.

System administrators can choose to give the individual services the capability to upload their own customized reports or narratives as well by selecting "Yes" for the option listed below on this screen. If individual services have not customized their own reports, the system default reports and narratives will automatically synchronize to the ImageTrend EMS Field Bridge version 4 or higher upon the next successful post.

File Name	User Updated	Date Updated	Active
PDF Reports (13)			
Billing Report	ImageTrend Admin	02/17/09 16:44	☑
Billing Report (Large Font)	ImageTrend Admin	02/17/09 08:58	☑
Comprehensive Report	ImageTrend Admin	02/17/09 10:46	☑
Comprehensive Report Without Billing	ImageTrend Admin	02/17/09 10:46	☑
Parent-Guardian Billing Authorization Form	ImageTrend Admin	02/17/09 10:46	☑
Parent-Guardian HIPAA Consent Form	ImageTrend Admin	02/18/09 09:11	☑
Parent-Guardian Waiver Of Liability Form	ImageTrend Admin	02/17/09 10:48	☐
Patient Billing Authorization Form	ImageTrend Admin	02/17/09 10:48	☑
Patient HIPAA Consent Form	ImageTrend Admin	02/17/09 10:48	☑
Patient Waiver Of Liability Form	ImageTrend Admin	02/17/09 10:48	☑
Prehospital Care Report	ImageTrend Admin	02/17/09 10:48	☑
Prehospital Care Report (Large Font)	ImageTrend Admin	02/17/09 10:48	☑
Signatures	ImageTrend Admin	02/17/09 10:48	☑
Narratives (2)			
Sequential Narrative	Joe Zombie	03/10/09 05:56	☑
SOAP Narrative	ImageTrend Admin	03/09/09 14:15	☑
Narrative Questions (1)			
SOAP Narrative.questions	ImageTrend Admin	03/09/09 14:15	☑

This section allows you to upload system wide default reports (acceptable file extension: .xsl), narratives (acceptable file extension: .xslt), or narrative questions (acceptable file extension: .xml)

New file: Browse...

Upload

Give ability to services to upload their own customized reports, narratives or narrative questions to synchronize to their EMS Field Bridge Units

Yes No

Submit

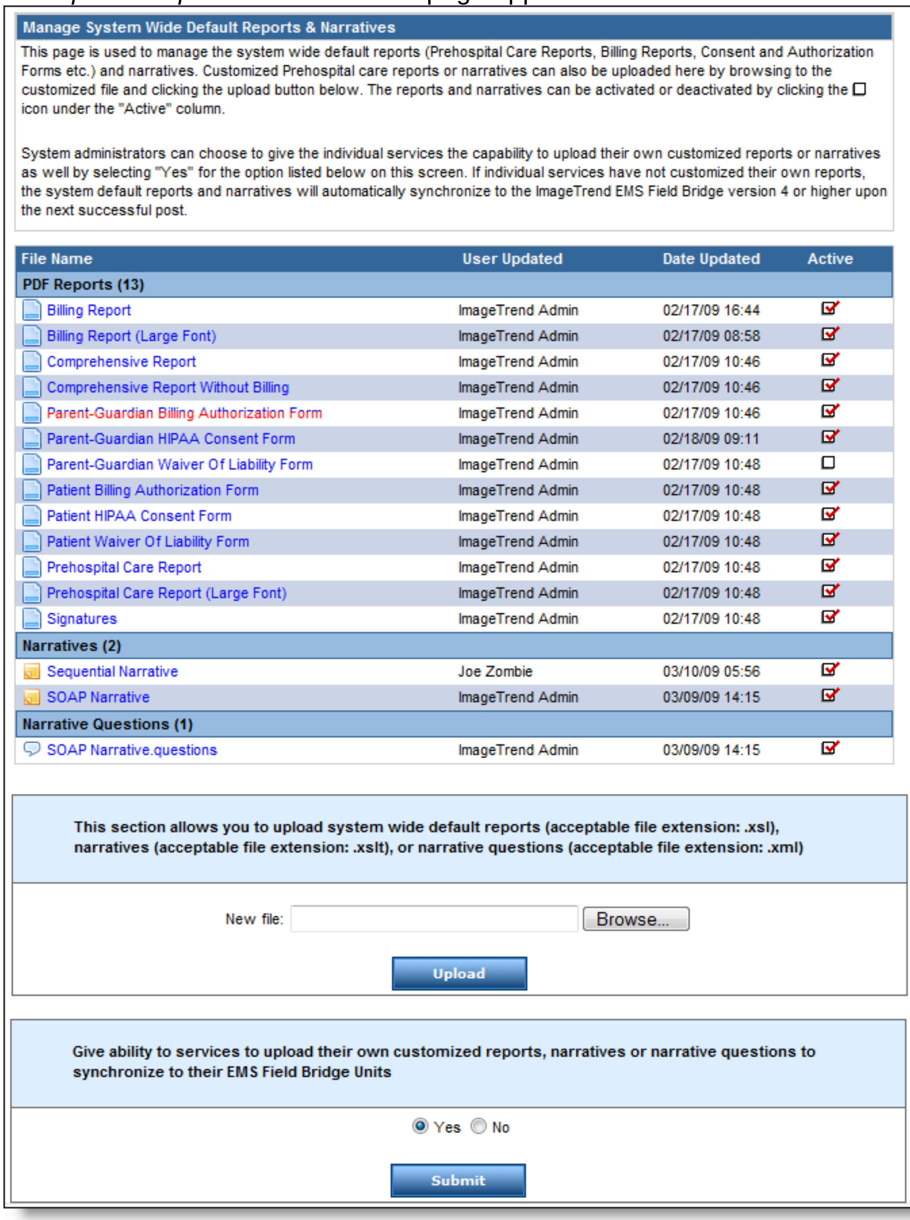
4. For the report(s) or narrative(s) to deactivate, deselect the *Active* checkbox.
   The report(s) or narrative(s) are deactivated and will not be available for use from the Field Bridge.

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.

1. From the upper right, click *Admin.*

2. Under *Run Forms,* click *Resources.*
   A sub-menu appears.
3. Under *Resources,* click *Reports and Narratives.*
   The *Upload Reports and Narratives* page appears.



Manage System Wide Default Reports & Narratives

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System administrators can choose to give the individual services the capability to upload their own customized reports or narratives as well by selecting "Yes" for the option listed below on this screen. If individual services have not customized their own reports, the system default reports and narratives will automatically synchronize to the ImageTrend EMS Field Bridge version 4 or higher upon the next successful post.

File Name	User Updated	Date Updated	Active
PDF Reports (13)			
Billing Report	ImageTrend Admin	02/17/09 16:44	☑
Billing Report (Large Font)	ImageTrend Admin	02/17/09 08:58	☑
Comprehensive Report	ImageTrend Admin	02/17/09 10:46	☑
Comprehensive Report Without Billing	ImageTrend Admin	02/17/09 10:46	☑
Parent-Guardian Billing Authorization Form	ImageTrend Admin	02/17/09 10:46	☑
Parent-Guardian HIPAA Consent Form	ImageTrend Admin	02/18/09 09:11	☑
Parent-Guardian Waiver Of Liability Form	ImageTrend Admin	02/17/09 10:48	☐
Patient Billing Authorization Form	ImageTrend Admin	02/17/09 10:48	☑
Patient HIPAA Consent Form	ImageTrend Admin	02/17/09 10:48	☑
Patient Waiver Of Liability Form	ImageTrend Admin	02/17/09 10:48	☑
Prehospital Care Report	ImageTrend Admin	02/17/09 10:48	☑
Prehospital Care Report (Large Font)	ImageTrend Admin	02/17/09 10:48	☑
Signatures	ImageTrend Admin	02/17/09 10:48	☑
Narratives (2)			
Sequential Narrative	Joe Zombie	03/10/09 05:56	☑
SOAP Narrative	ImageTrend Admin	03/09/09 14:15	☑
Narrative Questions (1)			
SOAP Narrative.questions	ImageTrend Admin	03/09/09 14:15	☑

This section allows you to upload system wide default reports (acceptable file extension: .xsl), narratives (acceptable file extension: .xslt), or narrative questions (acceptable file extension: .xml)

New file: [ ] Browse...

Upload

Give ability to services to upload their own customized reports, narratives or narrative questions to synchronize to their EMS Field Bridge Units

(•) Yes ( ) No

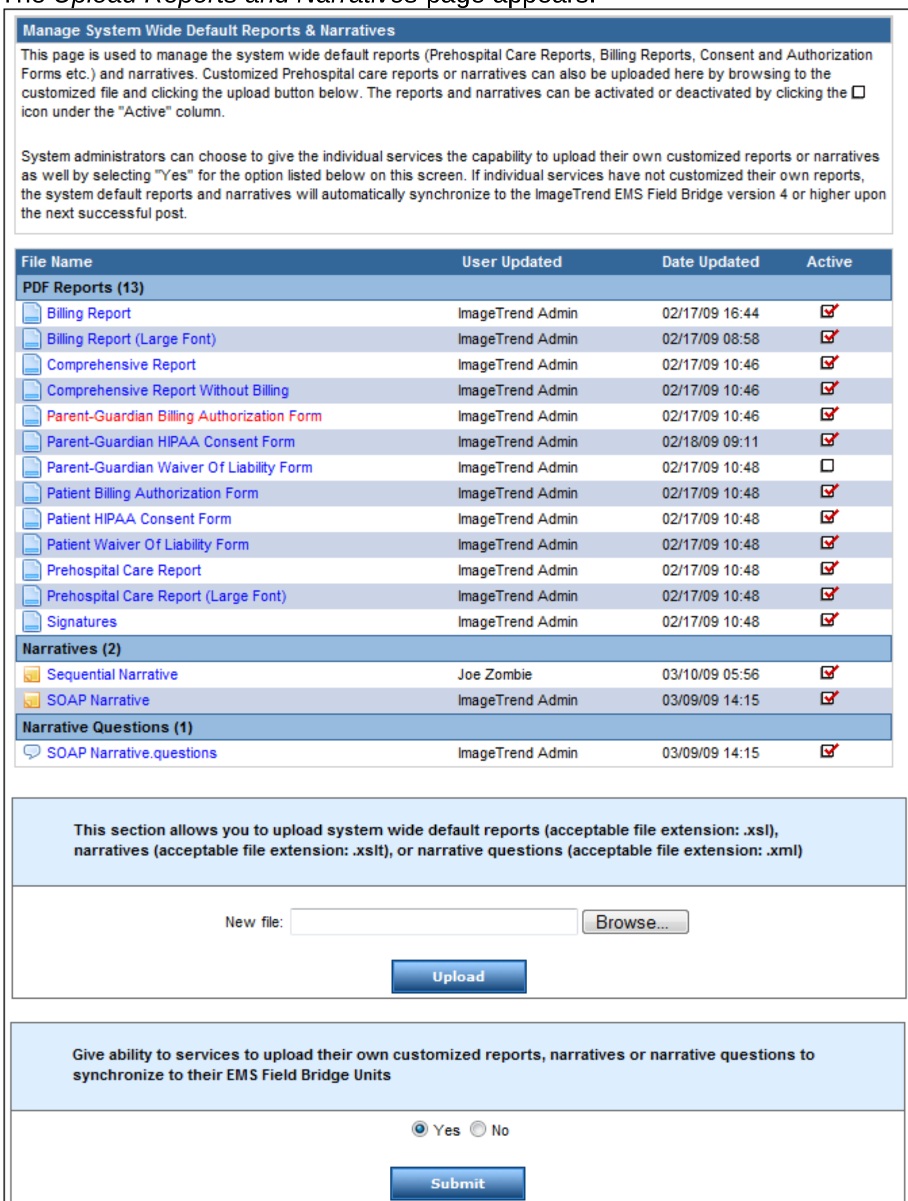
Submit

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

Setting Field Bridge Report and Narrative Permissions

Administrators have the option of allowing each service under the State Bridge the opportunity to select which reports and narratives are available to their service and Field Bridge, or to upload additional reports and narratives.

1. From the upper right, click *Admin.*
2. Under *Run Forms,* click *Resources.*
   A sub-menu appears.
3. Under *Resources,* click *Reports and Narratives.*
   The *Upload Reports and Narratives* page appears.



Manage System Wide Default Reports & Narratives

This page is used to manage the system wide default reports (Prehospital Care Reports, Billing Reports, Consent and Authorization Forms etc.) and narratives. Customized Prehospital care reports or narratives can also be uploaded here by browsing to the customized file and clicking the upload button below. The reports and narratives can be activated or deactivated by clicking the ☐ icon under the "Active" column.

System administrators can choose to give the individual services the capability to upload their own customized reports or narratives as well by selecting "Yes" for the option listed below on this screen. If individual services have not customized their own reports, the system default reports and narratives will automatically synchronize to the ImageTrend EMS Field Bridge version 4 or higher upon the next successful post.

File Name	User Updated	Date Updated	Active
PDF Reports (13)			
Billing Report	ImageTrend Admin	02/17/09 16:44	☑
Billing Report (Large Font)	ImageTrend Admin	02/17/09 08:58	☑
Comprehensive Report	ImageTrend Admin	02/17/09 10:46	☑
Comprehensive Report Without Billing	ImageTrend Admin	02/17/09 10:46	☑
Parent-Guardian Billing Authorization Form	ImageTrend Admin	02/17/09 10:46	☑
Parent-Guardian HIPAA Consent Form	ImageTrend Admin	02/18/09 09:11	☑
Parent-Guardian Waiver Of Liability Form	ImageTrend Admin	02/17/09 10:48	☐
Patient Billing Authorization Form	ImageTrend Admin	02/17/09 10:48	☑
Patient HIPAA Consent Form	ImageTrend Admin	02/17/09 10:48	☑
Patient Waiver Of Liability Form	ImageTrend Admin	02/17/09 10:48	☑
Prehospital Care Report	ImageTrend Admin	02/17/09 10:48	☑
Prehospital Care Report (Large Font)	ImageTrend Admin	02/17/09 10:48	☑
Signatures	ImageTrend Admin	02/17/09 10:48	☑
Narratives (2)			
Sequential Narrative	Joe Zombie	03/10/09 05:56	☑
SOAP Narrative	ImageTrend Admin	03/09/09 14:15	☑
Narrative Questions (1)			
SOAP Narrative.questions	ImageTrend Admin	03/09/09 14:15	☑

This section allows you to upload system wide default reports (acceptable file extension: .xsl), narratives (acceptable file extension: .xslt), or narrative questions (acceptable file extension: .xml)

New file: Browse...

Upload

Give ability to services to upload their own customized reports, narratives or narrative questions to synchronize to their EMS Field Bridge Units

Yes No

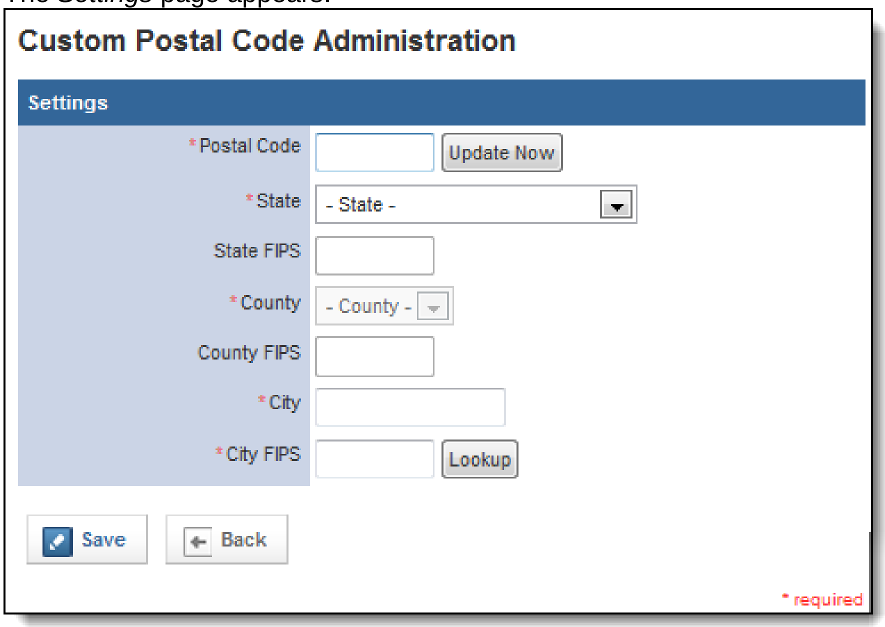
Submit

4. From the last section of the page, select whether individual services included under this State Bridge should be able to set up their own reports and narratives.
5. Click *Submit.*

6.13 Adding a Custom Postal Code

If an agency needs to record calls for a postal code, city or county that is not currently in the system, you can add it as a custom postal code. That will make this postal code information available to all services in your State Bridge.

1. From the upper right, click *Admin.*
2. Under *Run Forms,* click *Resources.*
   A sub-menu appears.
3. Under *Resources,* click *Postal Codes.*
   The *Custom Postal Code Administration* page appears.
4. Click *Add a Custom Postal Code.*
   The *Settings* page appears.



5. In the *Postal Code* text box, type the desired postal code.
6. **OPTIONAL:** To search for a record that may be in the system but not in use,
   a. Click *Update Now.*
      The *Search Criteria* page appears.
   b. For the desired place, click the *Add* icon .
      The information is entered.
7. From the *State* drop down menu, select the state for this postal code.
8. From the *County* drop down menu, select the county for this postal code.
9. In the *City* text box, type the name of the city for this postal code.
10. In the *City FIPS* text box, type the FIPS code for the desired city.
    OR
    To search for the FIPS code,
    a. Click *Lookup.*
       The *Search* page appears.
    b. Use the provided criteria to enter search criteria.
    c. Click *Search*.
       A list of search results appears.
    d. For the desired place, click the *Add* icon .
       The information is entered.
11. When finished, click *Save.*
    The new postal code is added and is available for service use.

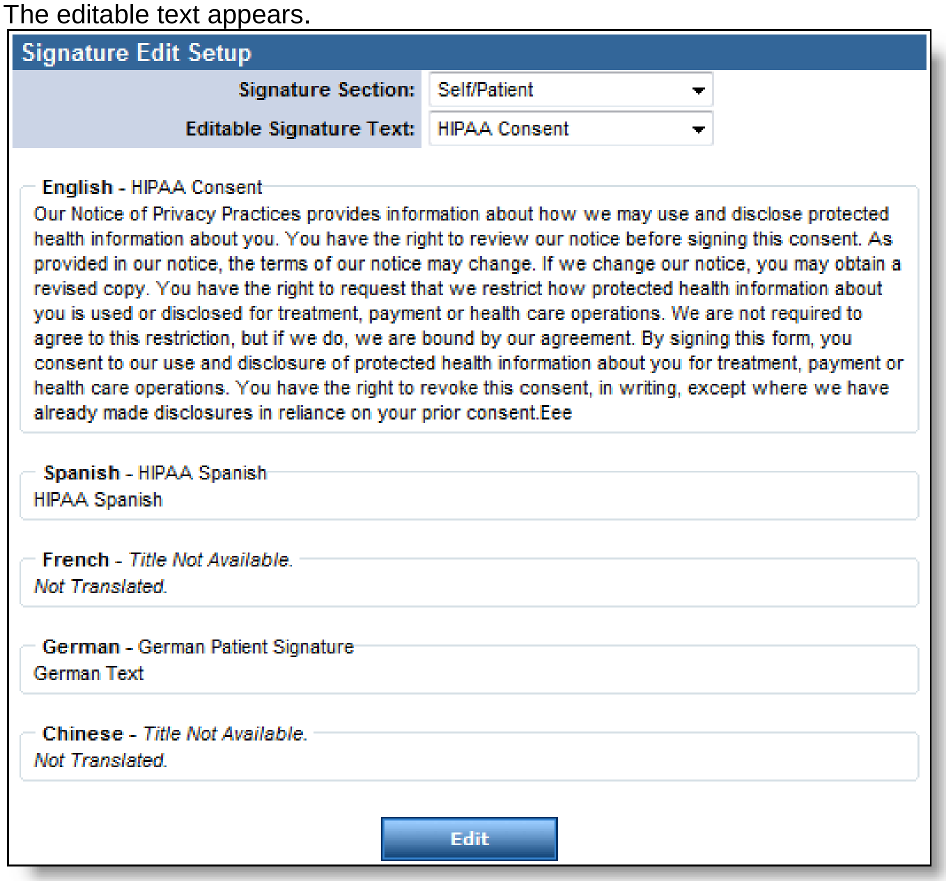
6.14 Overview of Signatures Options

System administrators can view and change the consent text for forms requiring signatures. This can include information for the standard consent forms as well as managing forms in other languages. ImageTrend does not provide translations for signature text. When signature consent form text is changed, the original text will still appear on forms that were submitted before the change.

Working with Consent Form Text

System administrators can view or edit consent text for each form for each language that is currently set up in the system.

1. From the upper right, click *Admin.*
2. Under *Run Forms,* click *Signatures.*
   A sub-menu appears.
3. Under *Signatures,* click *Signature Text.*
4. From the *Signature Edit Setup* table, in the *Signature Section* drop down menu, select the category of signature.
5. From the *Editable Signature Text* drop down menu, select the form with the consent text to work with.
   The editable text appears.

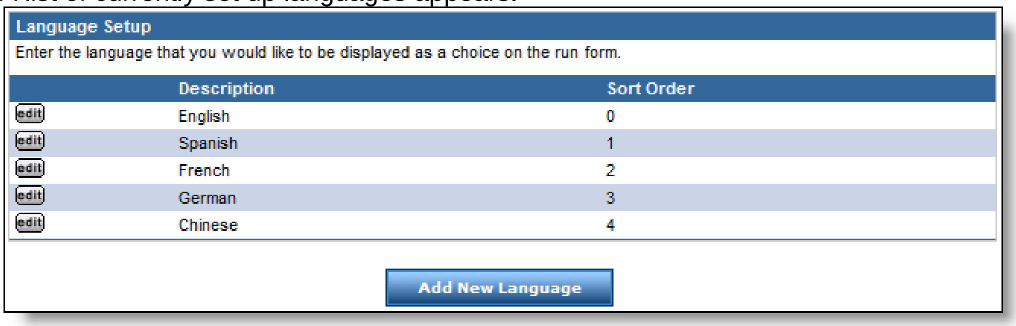


6. To edit the text, click *Edit.*
7. In the text boxes for the text for each language, make the desired changes.
8. When finished, click *Submit.*

Working with Consent Text Languages

Each form can be translated into other languages once that language has been set up in the system as a category. System administrators can set up languages, which allow forms to be classified as a language-specific form. ImageTrend does not provide translation services.

1. From the upper right, click *Admin.*
2. Under *Run Forms,* click *Signatures.*
   A sub-menu appears.
3. Under *Signatures,* click *Signature Languages.*
   A list of currently set up languages appears.



Language Setup

Enter the language that you would like to be displayed as a choice on the run form.

	Description	Sort Order
edit	English	0
edit	Spanish	1
edit	French	2
edit	German	3
edit	Chinese	4

Add New Language

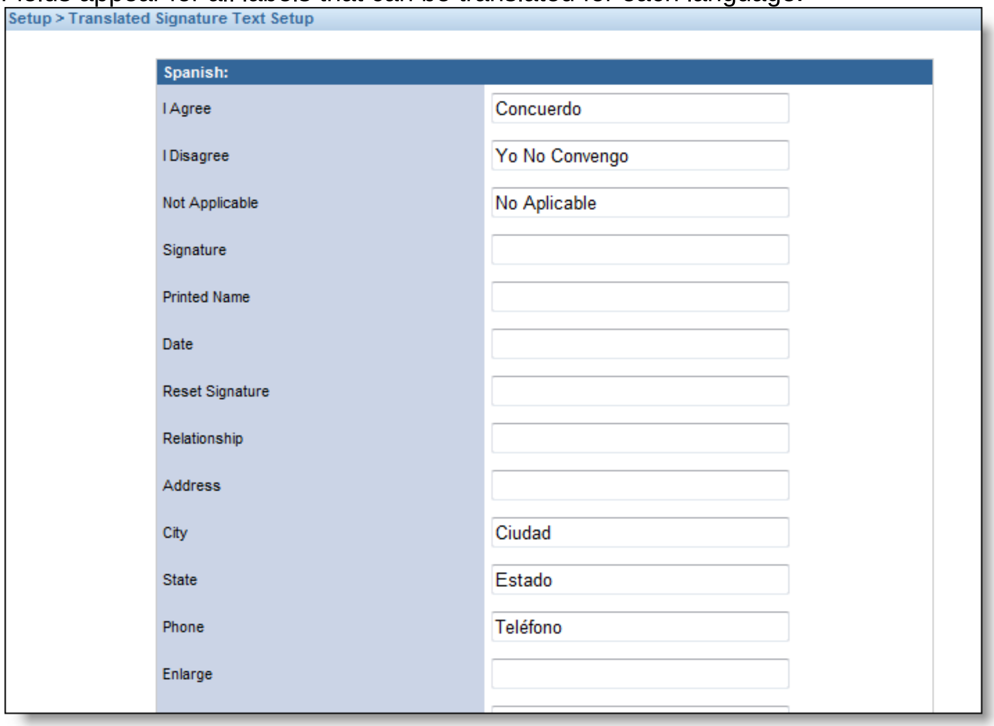
4. To change the order in the list in which a language appears,
   a. Click the corresponding *Edit* button.
   b. In the *Sort Order* text box, type the number of the new position.
   c. Click *Submit.*
5. To add a new language,
   a. Click *Add New Language.*
   b. In the *Language* text box, type the name of the language.
   c. In the *Sort Order* text box, type number of the language's position in the list.
   d. Click *Add.*

Working with Translated Form Labels

All fields that need to be completed on a form will have labels to show users where to respond. These labels can be translated into any of the languages in the system. ImageTrend does not provide translation services.

1. From the upper right, click *Admin.*
2. Under *Run Forms,* click *Signatures.*
   A sub-menu appears.
3. Under *Signatures,* click *Translated Signature Text.*

Fields appear for all labels that can be translated for each language.



4. In the provided fields for the correct language, provide the correct translation for the label.
5. When finished, click *Save.*

CHAPTER 7

RUN FORM MANAGEMENT

7.1 Chapter Overview

System administrators can work with the run form templates available in the system. These templates allow services to have run forms for specific purposes that have common fields already filled out, reducing completion time. (For example, a run form template for a cancelled call will already have unnecessary information marked as not applicable, but will still leave information for the address and patient information available.) This chapter explains how to set up new run forms or view and edit existing forms, how to access information about individual fields and how to change the name or description of tags or run forms.

7.2 Working with the Dynamic Run Form Editor

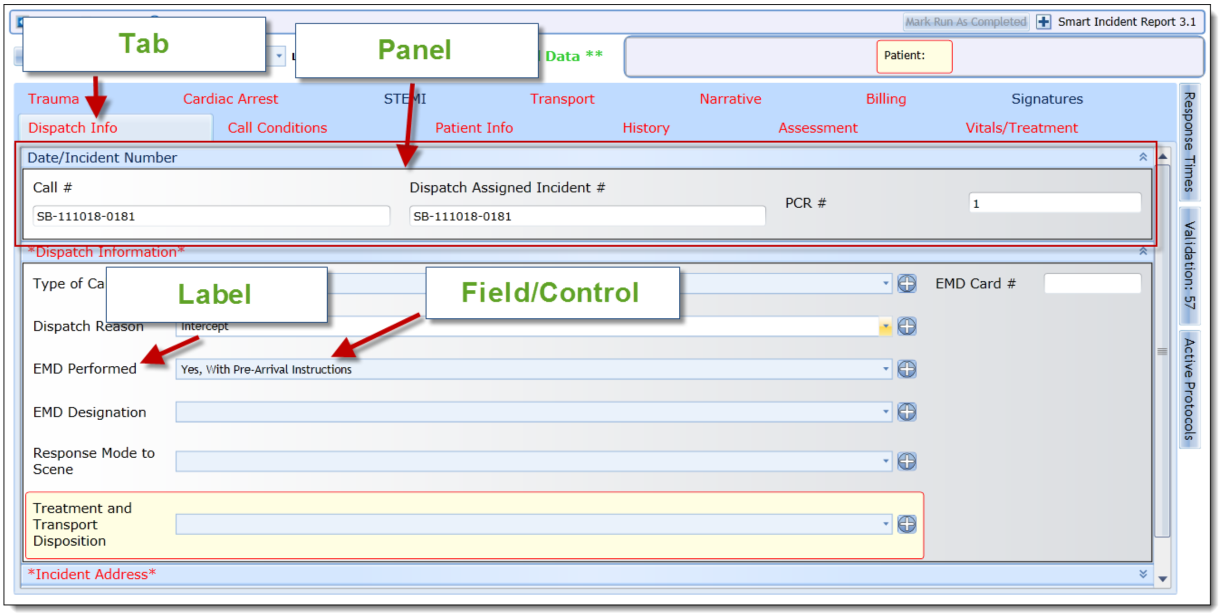
Using the State Bridge, administrators can create new custom run forms for the Field Bridge and State Bridge or can edit existing templates. This allows you to create templates for specific common situations, such as a cancelled call. In addition, you can rearrange the fields, panels and tabs in existing 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, although all features will work in the same way.

Tips and Recommendations

- When beginning to work with creating or editing run forms, ImageTrend recommends that you create a copy of the run form you are working with. Make changes to the copy to prevent accidental changes to a necessary run form that is currently in use.
- When creating a new run form, it may be easier to copy an existing run form if much of the information will be the same. This allows you to change, move or delete fields, panels and tabs, without having to add all information in from scratch.
- New Field Bridge templates will not be copied to each Field Bridge until the Field Bridge syncs with the 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.

Terms

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



Visibility Event

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

Default Value

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

Active/Inactive

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

Run Form Template Structure

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

Layout Editor

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

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

Run Form Template

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

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

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

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

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

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

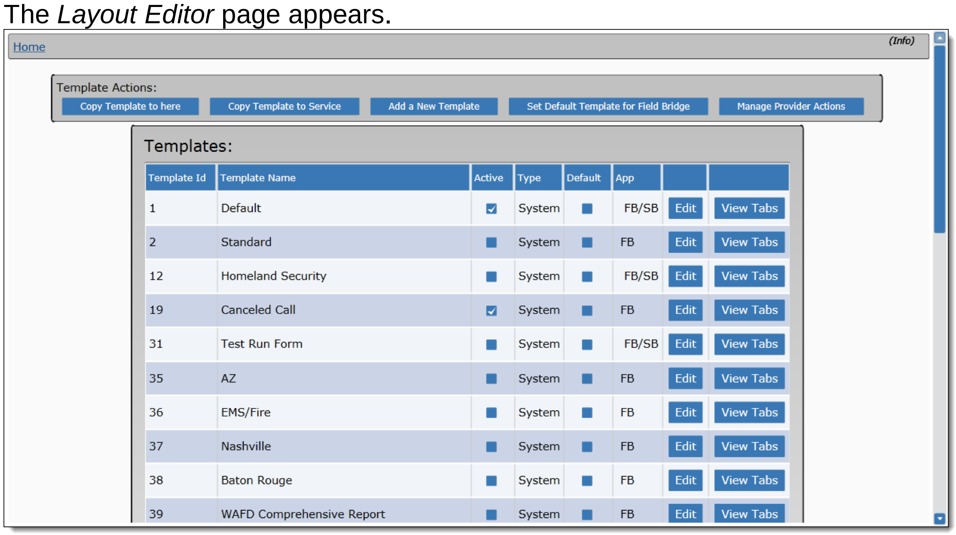
Controls
You can edit the following information when editing a specific control:

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

Editing the Name of a Template

Using the State Bridge, administrators can change the name of an existing dynamic run form template if necessary.

1. From the upper right, click *Admin.*
2. Under *Product Settings,* click *Run Forms.*
   A sub-menu appears.
3. Under *Run Forms,* click *Layout Editor.*
   The *Layout Editor* page appears.



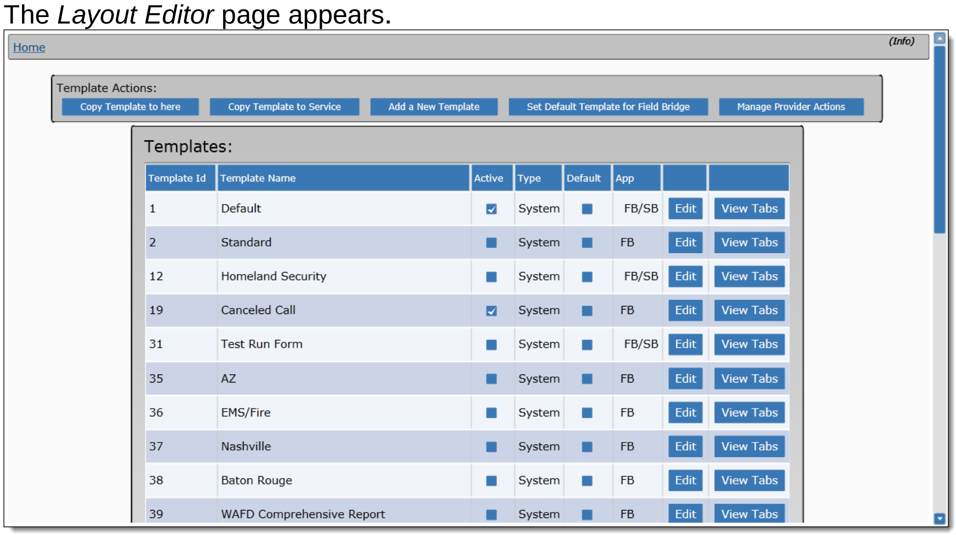
4. For the desired template, click *Edit.*
   The *Edit Template* dialog box appears.

5. In the *Template Text* text box, type the desired name for the template.
6. Click *OK.*
   The name is changed.

Copying a Template

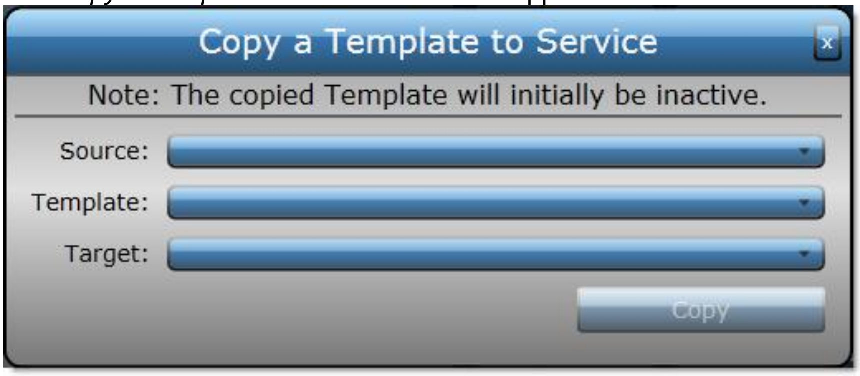
You can copy a template for testing, to keep a backup copy before editing or to create a new template similar to an existing one. When you copy a template, you must specify whether the template should be copied for a specific service to use or should remain in the *Admin* section.

1. From the upper right, click *Admin.*
2. Under *Product Settings,* click *Run Forms.*
   A sub-menu appears.
3. Under *Run Forms,* click *Layout Editor.*
   The *Layout Editor* page appears.



4. To copy a template for a specific service to work with,

a. Click *Copy Template to Service.*
The *Copy a Template to a Service* window appears.

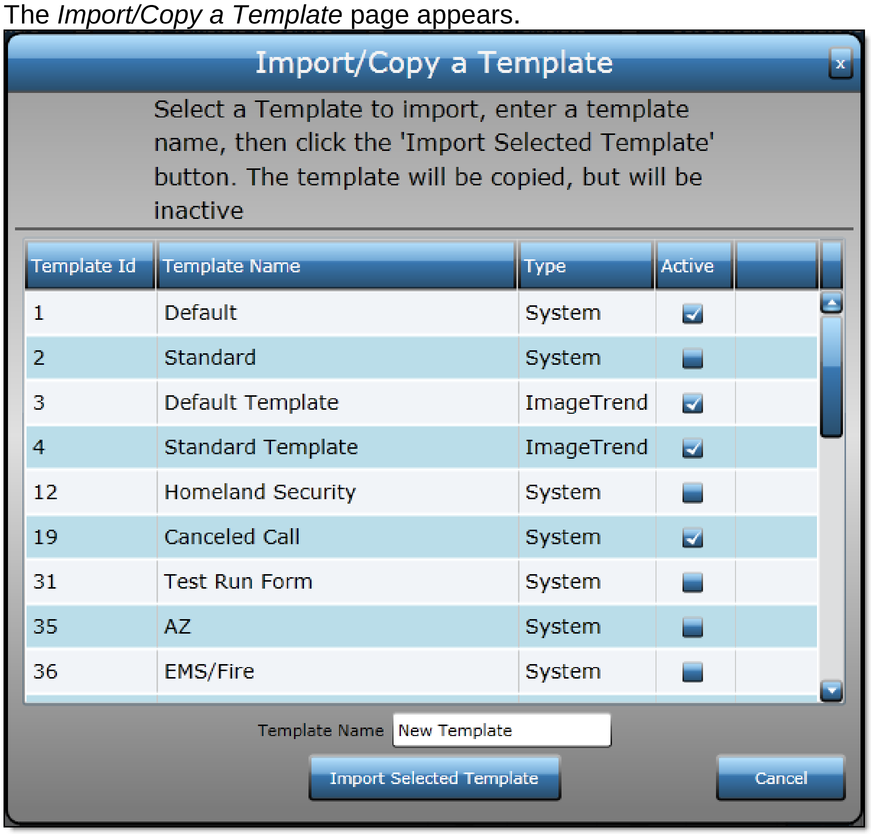


b. From the *Source* drop down menu, select where the template to be copied is saved.
c. From the *Template* drop down menu, select which template to copy.
d. From the *Target* drop down menu, select the service to which this template should be copied.
e. Click *Copy.*
When the template is copied, a confirmation dialog box appears.
f. Click *OK.*

OR

To copy a template to the *Admin* section,

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



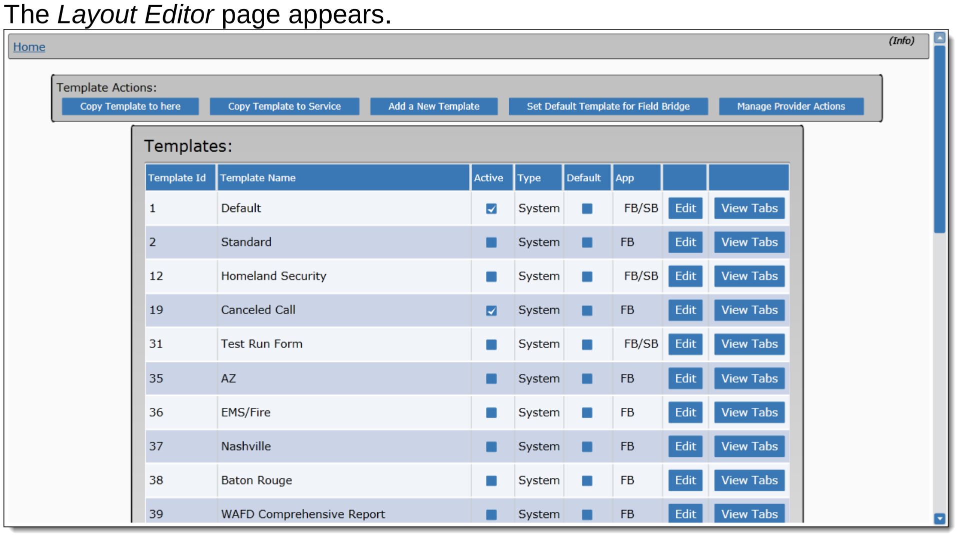
b. Select the template to copy.
c. In the *Template Name* text box, type a name for the template.

d. Click *Import Selected Template.*
A confirmation dialog box appears.
e. Click *OK.*
The new template is listed in the list.

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.

1. From the upper right, click *Admin.*
2. Under *Product Settings,* click *Run Forms.*
   A sub-menu appears.
3. Under *Run Forms,* click *Layout Editor.*
   The *Layout Editor* page appears.



4. Click *Add a New Template.*
   The *Add Template* dialog box appears.

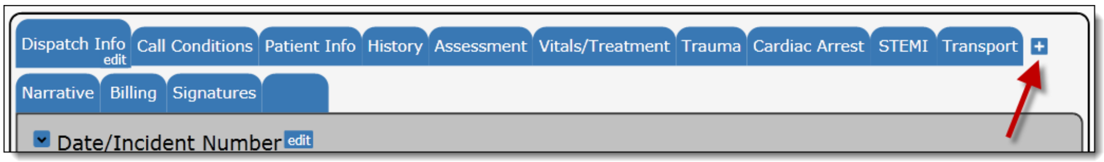
5. In the *Template Text* text box, type the name of the new template.
6. To set this template as active and available for use, ensure that the *Active Status* checkbox is selected.
   OR
   To set this template as inactive and not available for current use, deselect the *Active Status* checkbox.
7. From the *App Type* drop down menu, select which application should be able to use this template.

8. When finished, click *OK.*
   A confirmation dialog box appears.
9. To create the template, click *OK.*
10. Continue by editing the template to add tabs, panels and fields.

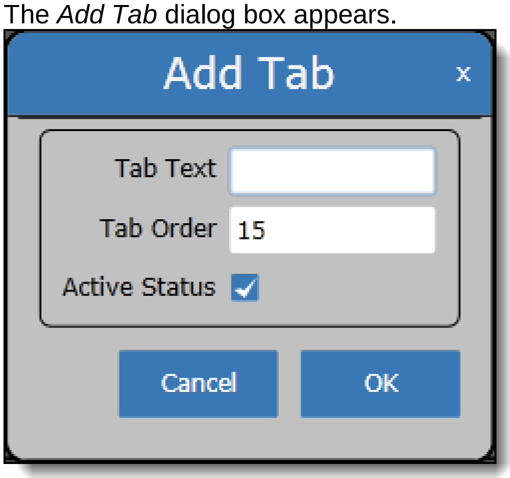
Adding a Tab

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

1. From the upper right, click *Admin.*
2. Under *Product Settings,* click *Run Forms.*
   A sub-menu appears.
3. Under *Run Forms,* click *Layout Editor.*
   The *Layout Editor* page appears.
4. For the template you want to edit, click the *View Tabs* button.
   A list of tabs for the run form appears.
5. Click the *Add Tab* icon.



   The *Add Tab* dialog box appears.



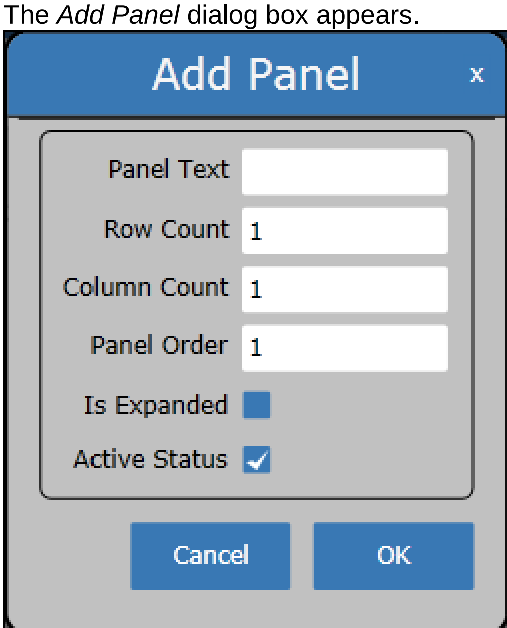
6. In the *Tab Text* text box, type the name of the tab.
7. In the *Tab Order* text box, type a number corresponding to the order that this tab should appear in the list of tabs (e.g., 1 for first).
8. To set this tab as active and visible, ensure that the *Active Status* checkbox is selected.
   OR
   To set this tab is inactive and not visible on this run form, deselect the *Active Status* checkbox.
   HINTS:
   If the template containing this tab is marked as inactive, the tab will not be displayed to anyone even if it is set as active.
   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.
9. When finished, click *OK.*
   The tab is added.
   HINT: After adding the tab, there will be no content. You will need to add panels and fields to see form content within the tab.

Adding a Panel

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

1. From the upper right, click *Admin.*
2. Under *Product Settings,* click *Run Forms.*
   A sub-menu appears.
3. Under *Run Forms,* click *Layout Editor.*
   The *Layout Editor* page appears.
4. For the template you want to edit, click the *View Tabs* button.
   A list of tabs for the run form appears.
5. Click the name of the tab to which you want to add a panel.
6. At the bottom of the list of panels, click the *Add* icon.

The *Add Panel* dialog box appears.



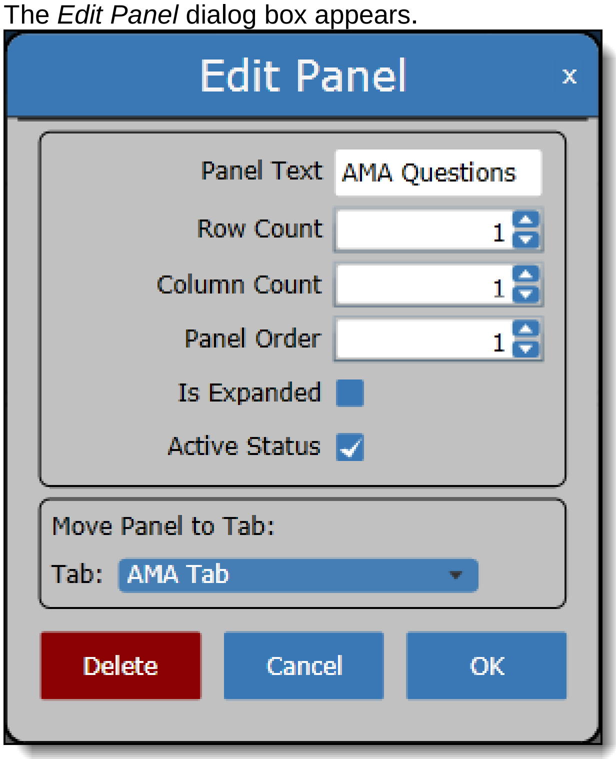
7. In the *Panel Text* text box, type the name of the panel.
8. In the *Row Count* and *Column Count* text boxes, type the number or rows and columns wide and tall this panel should appear.
9. To determine where this panel should appear in relation to the other panels in the tab (e.g., first, second), in the *Panel Order* text box, type this panel's position.
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.
11. 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.

12. When finished, click *OK.*
    The panel is added.
    HINT: After adding the tab, there will be no content. You will need to add panels and fields to see form content within the tab.

Editing a Panel

After you have set a panel up, you can make changes to it if you need to. Making changes to the panel itself can allow you to change the name, size, order or status of the panel.

1. From the upper right, click *Admin.*
2. Under *Product Settings,* click *Run Forms.*
   A sub-menu appears.
3. Under *Run Forms,* click *Layout Editor.*
   The *Layout Editor* page appears.
4. For the template you want to edit, click the *View Tabs* button.
   A list of tabs for the run form appears.
5. Click the name of the tab containing the panel.
6. For the panel you want to change, click the *Edit* button.
   The *Edit Panel* dialog box appears.



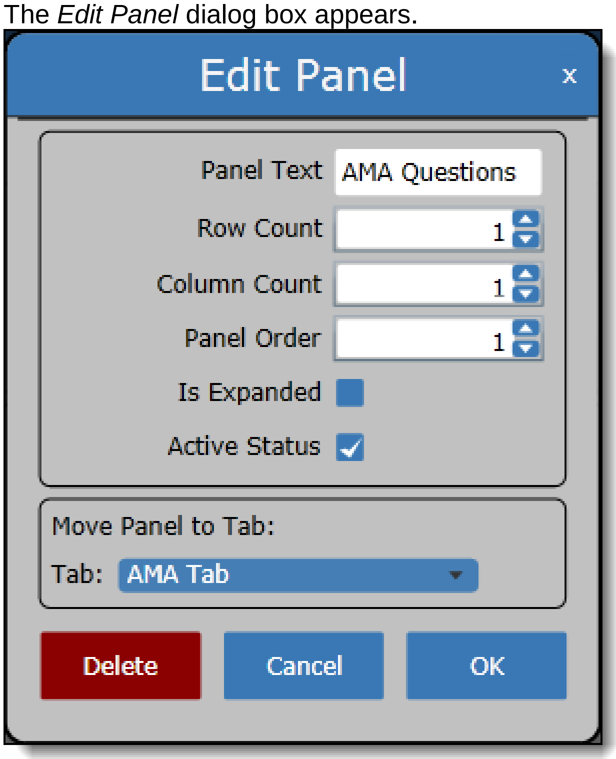
7. To change the title, in the *Panel Text* text box, type the desired name.
8. To change the number of rows or columns in the panel (e.g., to change the size or the number of spaces that fields will have to fit within), in the *Row Count* or *Column Count* sections, type the desired number or use the *More* and *Fewer* icons to select the number.
9. To change the panel's order in relation to the other panels within this tab, in the *Panel Order* section, type the desired number or use the *More* and *Fewer* icons to select the number.
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.

11. 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.
12. When finished, click *OK.*

Moving a Panel

You can move an entire panel to a new tab when editing a panel.

1. From the upper right, click *Admin.*
2. Under *Product Settings,* click *Run Forms.*
   A sub-menu appears.
3. Under *Run Forms,* click *Layout Editor.*
   The *Layout Editor* page appears.
4. For the template you want to edit, click the *View Tabs* button.
   A list of tabs for the run form appears.
5. Click the name of the tab containing the panel.
6. For the panel you want to change, click the *Edit* button.
   The *Edit Panel* dialog box appears.

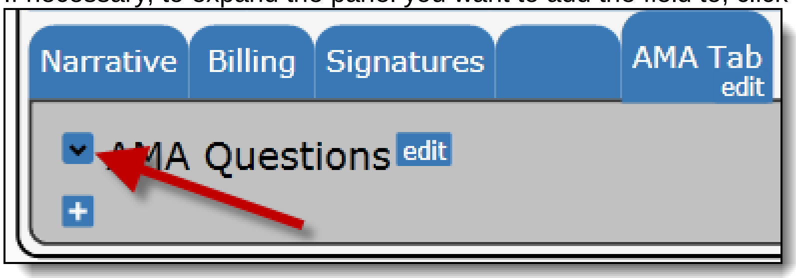


7. In the *Move Panel to Tab* section, from the *Tab* drop down menu, select the new tab in which this panel should appear.
   HINT: When moving a panel, you will want to open the new tab to make sure the panel order is correct after moving the panel.
8. Click *OK.*
   The panel is moved to the new tab and removed from the current tab.

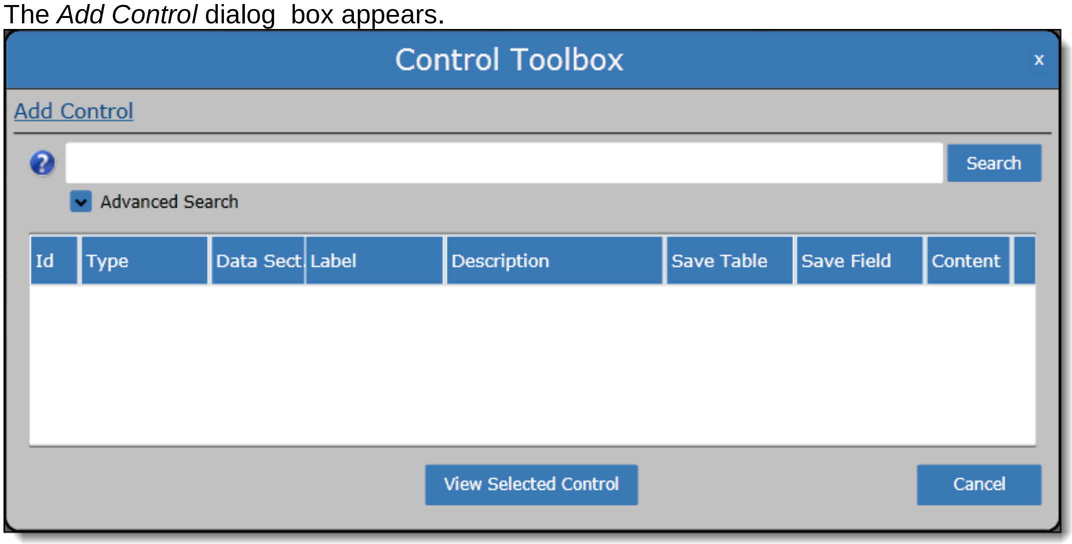
Adding a Field

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

1. From the upper right, click *Admin.*
2. Under *Product Settings,* click *Run Forms.*
   A sub-menu appears.
3. Under *Run Forms,* click *Layout Editor.*
   The *Layout Editor* page appears.
4. For the template you want to edit, click the *View Tabs* button.
   A list of tabs for the run form appears.
5. Click the name of the tab containing the panel.
6. If necessary, to expand the panel you want to add the field to, click the *Expand* icon.

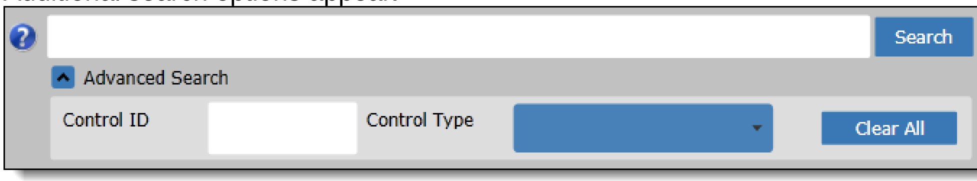


7. Place your mouse above the empty space that you want to add the field to.
   The *Add Control* button appears.
8. Click *Add Control.*
   The *Add Control* dialog box appears.



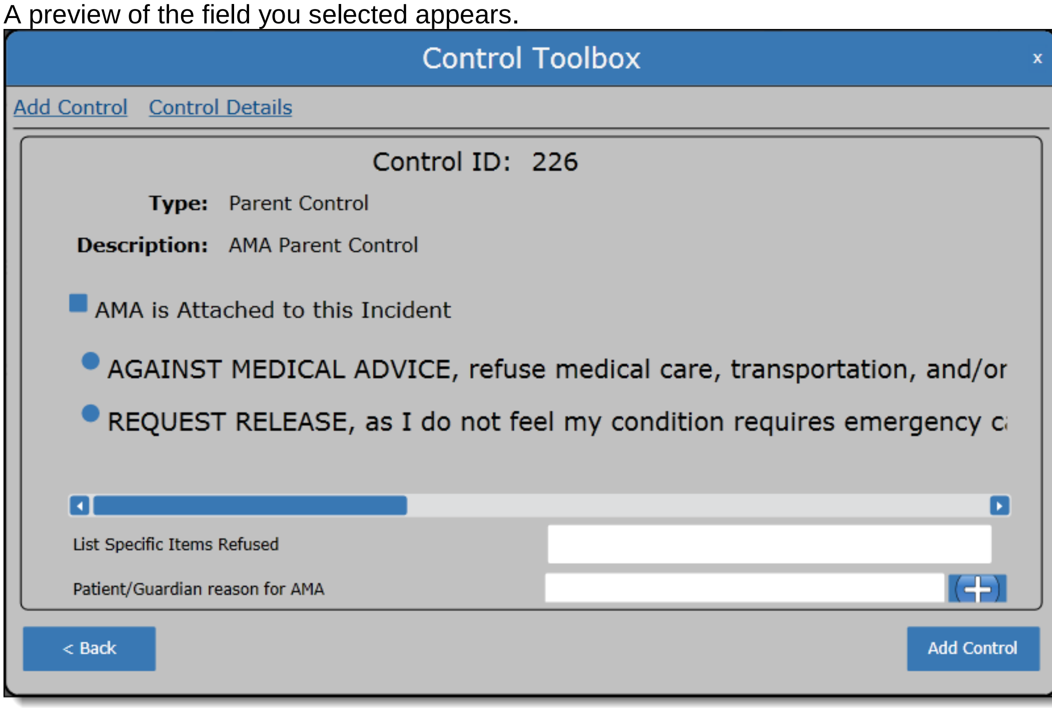
9. In the *Search* text box, type the name or part of the name of the field you want to add.
   OR
   To search by different criteria,

a. Click *Advanced Search.*
   Additional search options appear.



b. Use the provided fields to enter your search criteria.

10. Click *Search.*
    A list of all fields matching your criteria appears.
11. Select the field you want to add.
12. Click *View Selected Control.*
    A preview of the field you selected appears.



13. 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 9–13 until the desired field is added.

Moving Fields

You can move a field to a new location in its panel as long as there is an empty space for the field to be placed in.

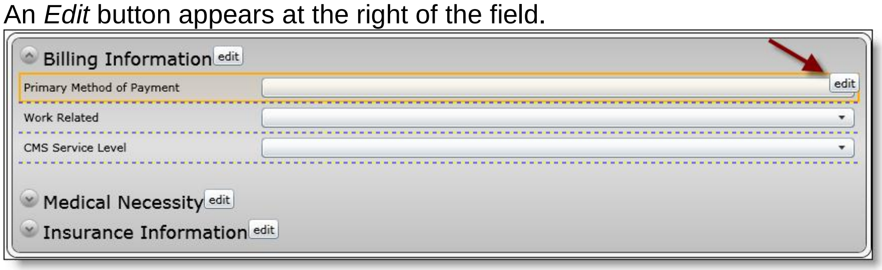
1. From the upper right, click *Admin.*
2. Under *Product Settings,* click *Run Forms.*
   A sub-menu appears.
3. Under *Run Forms,* click *Layout Editor.*
   The *Layout Editor* page appears.

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

7. 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 and Close.*
   The field is moved

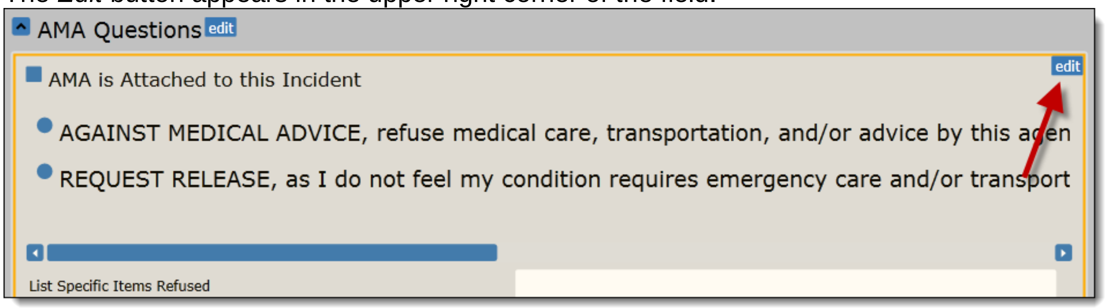
Editing a Field

When editing a field, you can make changes to things including the label for that field, how big the field is, whether people will be able to use the spell checker tool for the field, and whether there is any default value selected for this field.

1. From the upper right, click *Admin.*
2. Under *Product Settings,* click *Run Forms.*
   A sub-menu appears.
3. Under *Run Forms,* click *Layout Editor.*
   The *Layout Editor* page appears.
4. For the template you want to edit, click the *View Tabs* button.
   A list of tabs for the run form appears.
5. Click the name of the tab containing the panel.

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

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



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

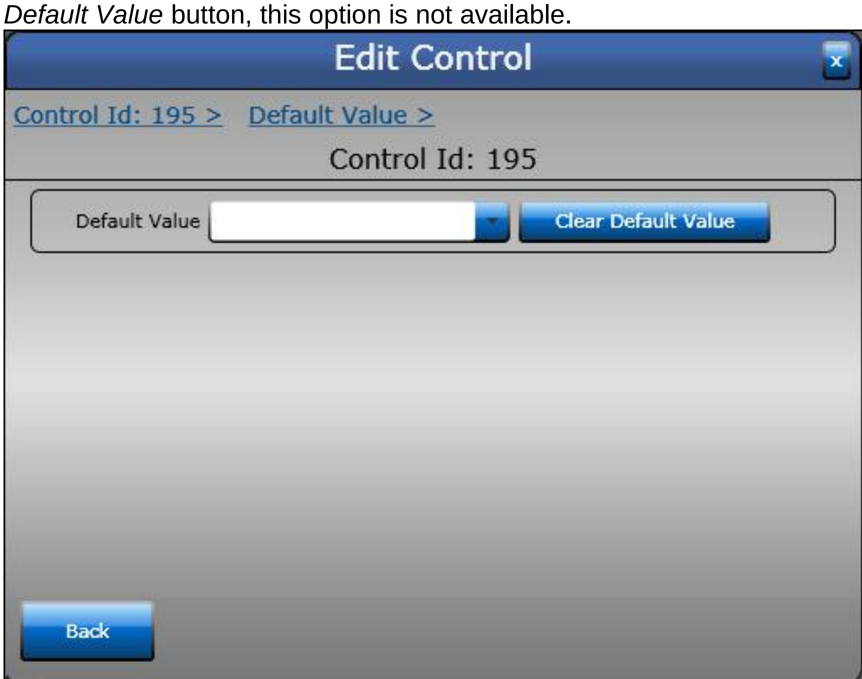
9. To change the field's positioning, in the *Grid Row* and *Grid Column*, select the desired column and row number.
10. To change the number of columns or rows tall or wide a field covers, in the *Row Span* and *Column Span* sections, select the desired number of columns wide or tall the field should be.
11. 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.
12. 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.
13. 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.
14. To change the text labeling the field, in the *Label Properties* section, in the *Label* text box, type the new desired text.
15. 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.

16. 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.
17. 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.
18. 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.
19. 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.
20. 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 on the run form, in the *Other Properties* section, deselect the *Active Status* checkbox.
21. To add content to a field with non-editable content (e.g., the text on a button or a single checkbox), in the *Content* text box, type the content.

    HINT: Be careful about which field you add content to, as you may accidently add text over a field and prevent the user from seeing the area in which they should respond.
22. To add a value that should be selected by default, click *Add Default Value.*
    The *Edit Control* dialog box appears.

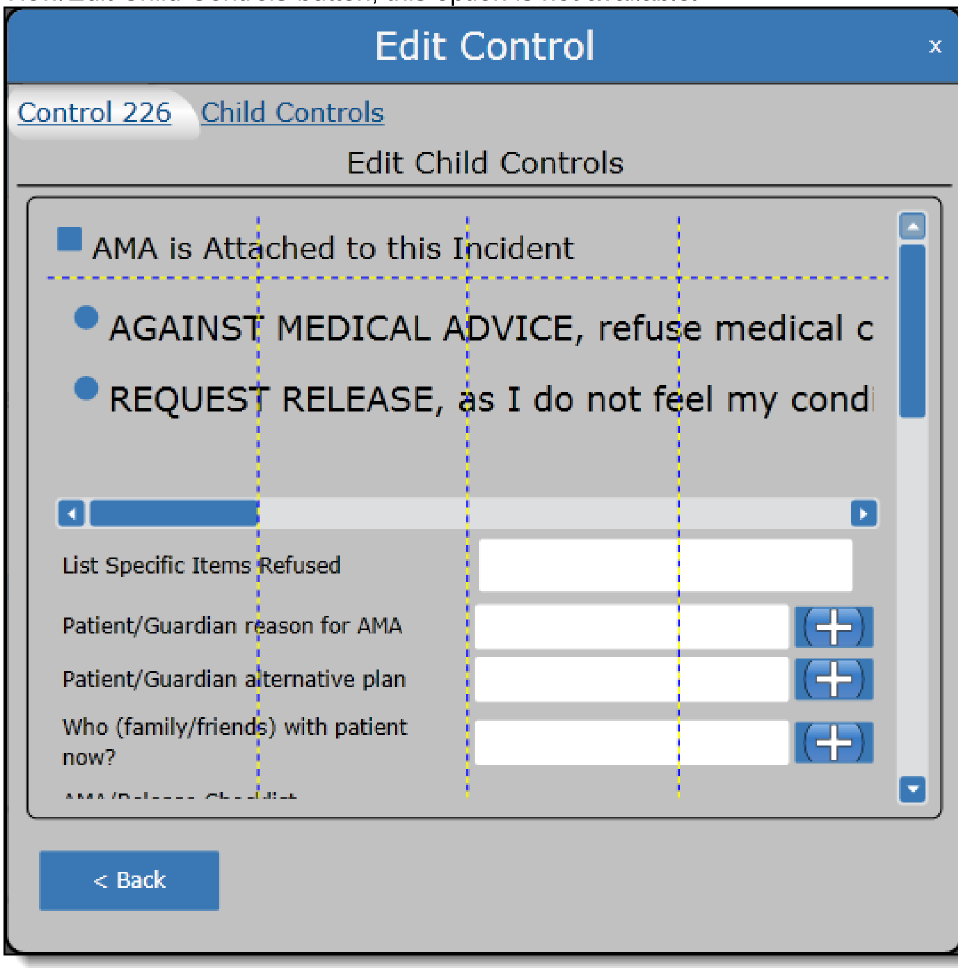
    NOTE: Not all fields will allow you to select a default value. If you do not see the *Add Default Value* button, this option is not available.



23. From the *Default Value* drop down menu, select the desired value.
24. Click *Back.*
25. To enable a spell check feature for this field, in the *Other Properties* section, select *Spell Check On.*

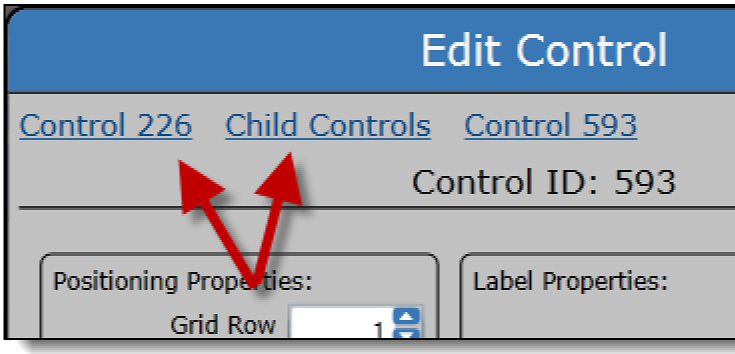
    NOTE: Not all fields will allow you to enable spell check. If you do not see the *Spell Check On* checkbox, this option is not available.

26. 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. If you do not see the *Row Count* and *Column Count* text boxes within the *Other Properties* section, this option is not available.
27. 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 9–27 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.

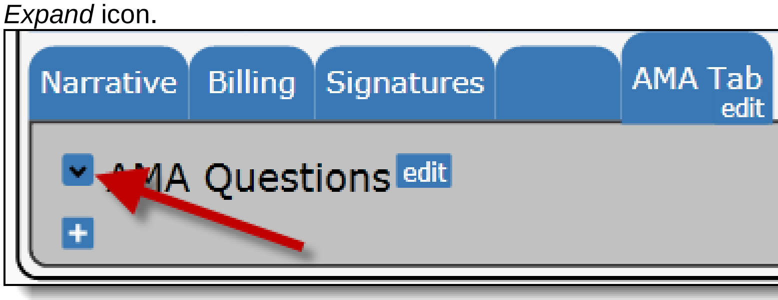


28. When finished with all editing, click *Save & Close.*

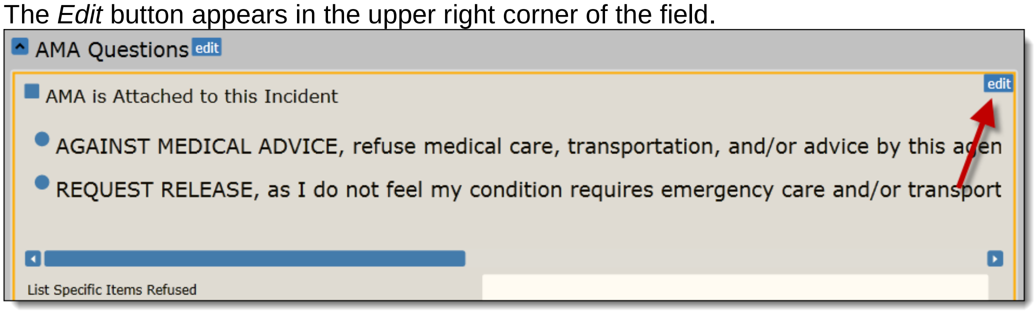
Deleting a Field

At times, you may need to delete a field 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. From the upper right, click *Admin.*
2. Under *Product Settings,* click *Run Forms.*
   A sub-menu appears.
3. Under *Run Forms,* click *Layout Editor.*
   The *Layout Editor* page appears.
4. For the template you want to edit, click the *View Tabs* button.
   A list of tabs for the run form appears.
5. Click the name of the tab containing the panel.
6. If necessary, to expand the panel containing the field you want to remove, click the *Expand* icon.



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



8. Click the *Edit* button for the field.
   The *Edit Control* dialog box appears.
9. Click *Delete.*
   A confirmation dialog box appears.

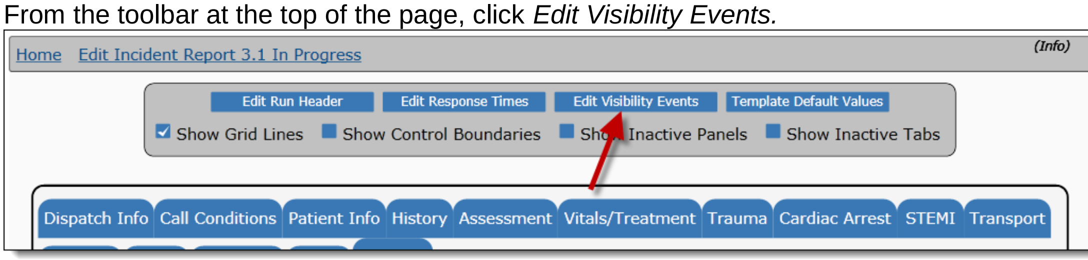
10. Click *OK.*
    The control is removed.

Adding a Visibility Event for a Template

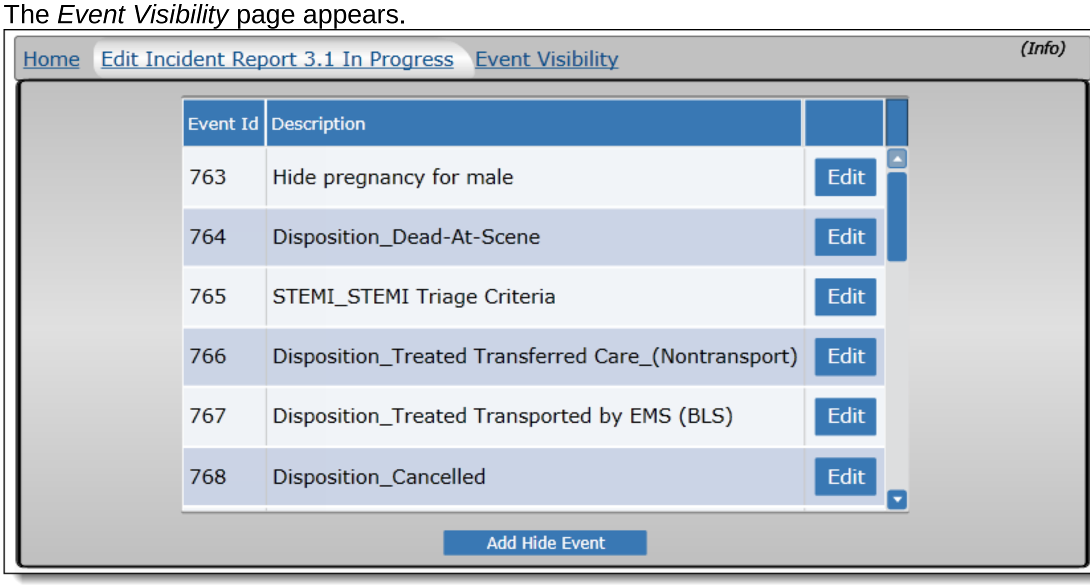
Visibility events allow you to show or hide specific parts of the run form template based on data entered into a run form. This reduces the number of unnecessary fields; for example, you could set a visibility event up to hide the *Pregnancy* field if the patient is male. Visibility events can be set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

When setting up visibility events, 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.

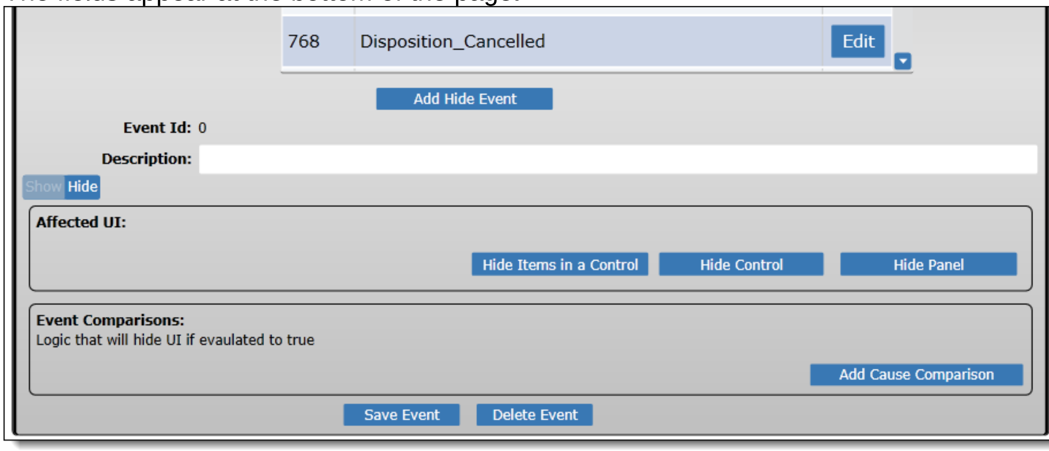
1. From the upper right, click *Admin.*
2. Under *Product Settings,* click *Run Forms.*
   A sub-menu appears.
3. Under *Run Forms,* click *Layout Editor.*
   The *Layout Editor* page appears.
4. For the template you want to edit, click the *View Tabs* button.
   A list of tabs for the run form appears.
5. From the toolbar at the top of the page, click *Edit Visibility Events.*



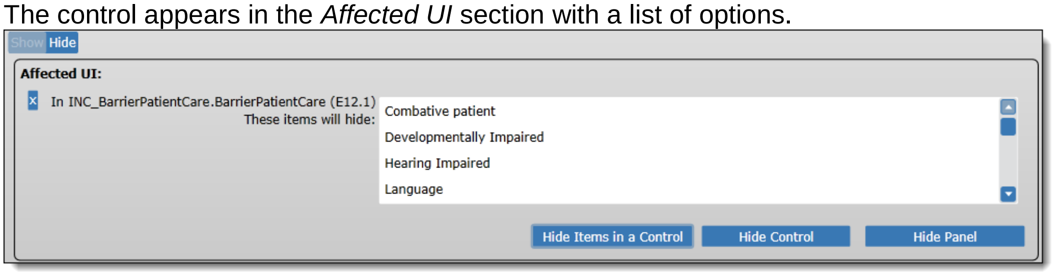
The *Event Visibility* page appears.



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



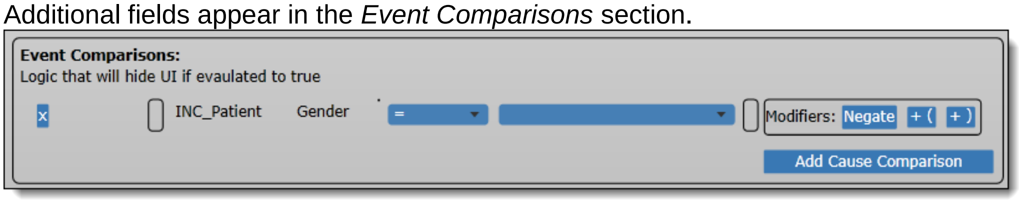
7. In the *Description* text box, type a descriptive name for this event.
   HINT: Providers will never see this name, but it can be a very helpful way to keep track of which visibility event is which in case you need to make changes later. Since the criteria set up with visibility events can become quite complex, it is easiest to create a descriptive name to help you organize your visibility events.
8. 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.
9. 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).
10. 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.
11. 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.

12. 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.
13. 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.



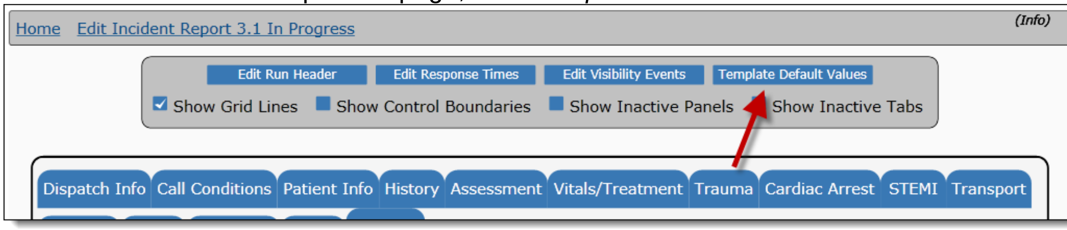
    g. From the first drop down menu after the control name, select the desired operator (e.g., equals)
    h. If necessary, to make the criteria negative (e.g., if the sections should be hidden only if a specific value is NOT selected), in the *Modifiers* section, click *Negate.*
    i. From the second 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 Default Values for a Template

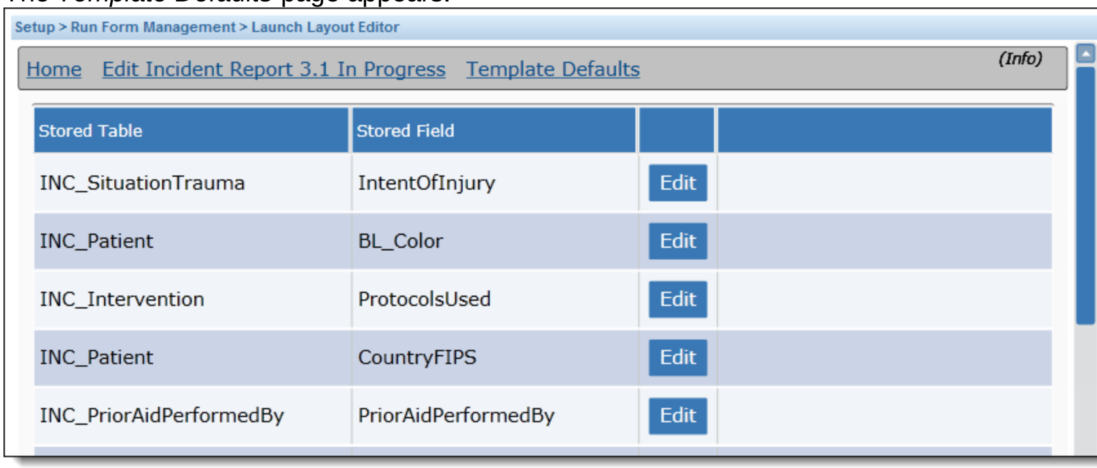
Default values will be automatically selected on run forms using the template that the value was set up in. You can assign default values individually by editing specific fields, or you can set defaults from a list of all fields that can contain default values. This section will examine how to set default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

1. From the upper right, click *Admin.*
2. Under *Product Settings,* click *Run Forms.*
   A sub-menu appears.
3. Under *Run Forms,* click *Layout Editor.*
   The *Layout Editor* page appears.
4. For the template you want to edit, click the *View Tabs* button.
   A list of tabs for the run form appears.

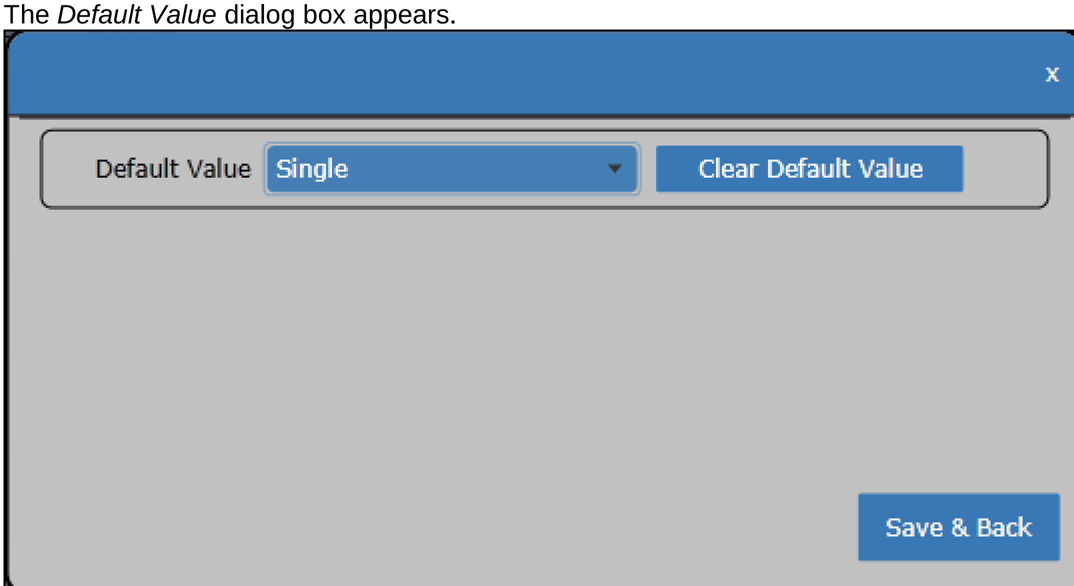
5. From the toolbar at the top of the page, click *Template Default Values.*



The *Template Defaults* page appears.



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

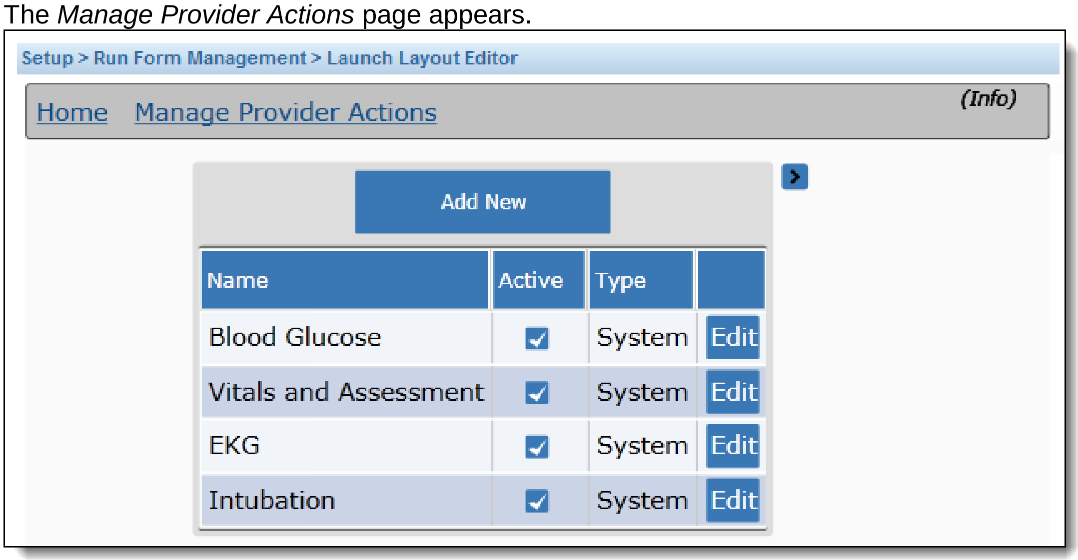


7. Select the desired default value.
OR
To remove a default value that is currently assigned, click *Clear Default Value.*
8. When finished, click *Save & Back.*
The changes are saved.

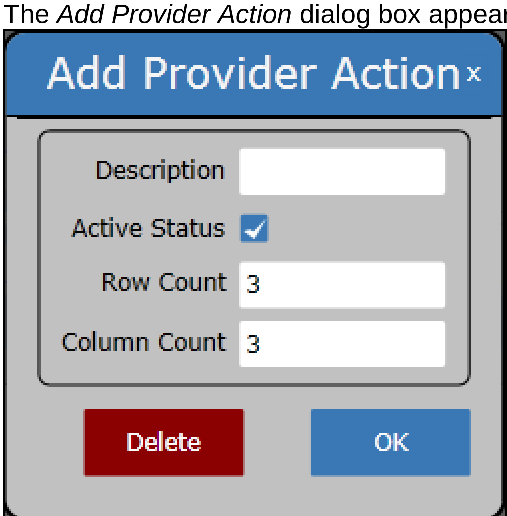
Setting Up Provider Actions

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.

1. From the upper right, click *Admin.*
2. Under *Product Settings,* click *Run Forms.*
   A sub-menu appears.
3. Under *Run Forms,* click *Layout Editor.*
   The *Layout Editor* page appears.
4. From the *Template Actions* toolbar at the top of the page, click *Manage Provider Actions.*
   The *Manage Provider Actions* page appears.



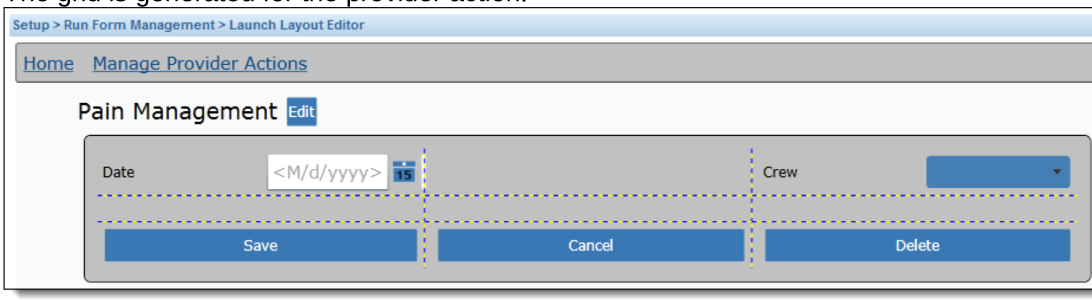
5. Click *Add New.*
   The *Add Provider Action* dialog box appears.



6. 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.
7. 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.

8. In the *Row Count* and *Column Count* text boxes, type the number of rows and columns that should be available to place fields in.
9. Click *OK.*
   The grid is generated for the provider action.



10. 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.

7.3 Adding and Editing Standard Run Forms

System administrators can edit standard EMS run forms that have already been created or can create new custom run forms. These forms can be altered to show different tabs, different summary information or the positioning of the fields already included in the form. When creating a new run form, please keep in mind the validity rules that are in place for this system. If a required field is not displayed on a run form, providers using that run form will not be able to complete the field and will not be able to achieve a 100% validity score.

Adding New Run Forms

After the basic information for a new run is added, it must be edited to configure the tabs and fields that will appear.

1. From the top right, click *Admin.*
2. Under *Run Forms,* click *Templates & Permissions.*
   A sub-menu appears.
3. Under *Templates & Permissions,* click *Run Form Templates.*
   The *Run Forms* page appears.

Code	Title	Category	Created	From	To	Default Template	Active
1	Cancelled Call	EMS	12/13/2006	12/13/2006	12/13/2025	☐	☐
1.0	EMS Run Form with Fire	EMS	04/17/2006	04/17/2006	04/17/2010	☑	☑
2.3.0	Incident Run Form ver 2.3	EMS	06/20/2005	06/20/2005	09/20/2026	☐	☑
1.0	NFIRS Fire Incident Form	Fire	04/17/2006	04/17/2006	04/17/2010	☐	☑

Records 1-4 of 4
Goto Page: 1
Add New Form

4. Click *Add New Form.*
5. In the *Title* text box, type a name for the form.

6. In the *Date Start* text box, type the first date that this form should be available for use.
   OR
   To select the date from a calendar, click the correct *Calendar* icon and click the date.
7. In the *Date End* text box, type the last date that this form should be available for use.
   OR
   To select the date from a calendar, click the correct *Calendar* icon and click the date.
8. In the *Version Code* text box, type the version of the run form.
9. From the *Category* drop down menu, select the type of run form.
10. In the *Please enter the Form description* text box, type a description or any clarifying details about the form.
11. When finished, click *Save.*
    The run form opens for editing.
12. Using the options from the *I want to* drop down menu, format the new run form as desired.
    HINT: For more information, please refer to *Editing Existing Run Forms* and *Formatting Run Form Options.*

Editing Existing Run Forms

System administrators can edit the information available on run forms.

1. From the top right, click *Admin.*
2. Under *Run Forms,* click *Templates & Permissions.*
   A sub-menu appears.
3. Under *Templates & Permissions,* click *Run Form Templates.*
   The *Run Forms* page appears.

Code	Title	Category	Created	From	To	Default Template	Active
1	Cancelled Call	EMS	12/13/2006	12/13/2006	12/13/2025	☐	☐
1.0	EMS Run Form with Fire	EMS	04/17/2006	04/17/2006	04/17/2010	☑	☑
2.3.0	Incident Run Form ver 2.3	EMS	06/20/2005	06/20/2005	09/20/2026	☐	☑
1.0	NFIRS Fire Incident Form	Fire	04/17/2006	04/17/2006	04/17/2010	☐	☑

Records 1-4 of 4

Goto Page: 1

Add New Form

4. From the list of run forms, click the form to edit.
5. To work with tabs, from the *I want to* drop down menu, select *Tab View.*
   HINT: For more information about working with tabs, please refer to *Formatting Run Form Options.*
6. To change the summary information about the form, from the *I want to* drop down menu, select *Edit Form Information.*
   HINT: For more information about working with summary information, please refer to *Formatting Run Form Options.*
7. To edit the fields available in each tab or their placement in the run form, from the *I want to* drop down menu, select *Edit Layout/Sections.*
   HINT: For more information about editing fields in the run form, please refer to *Formatting Run Form Options.*
8. To preview the run form as it will appear to system users, from the *I want to* drop down menu, select *Preview Layout.*

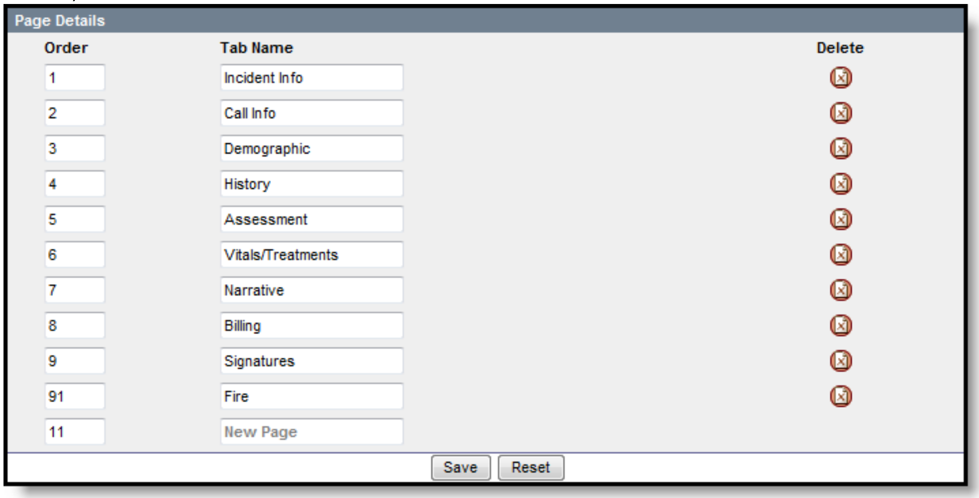
Formatting Run Form Options

Run forms can be edited by changing the available tabs and fields or the summary information.

Working with Run Form Tabs

All information in run forms is organized into tabs. System administrators can edit the tabs that are available or the order in which those tabs appear.

1. Once the run form has been opened for editing, from the *I want to* drop down menu, click *Tab View.*

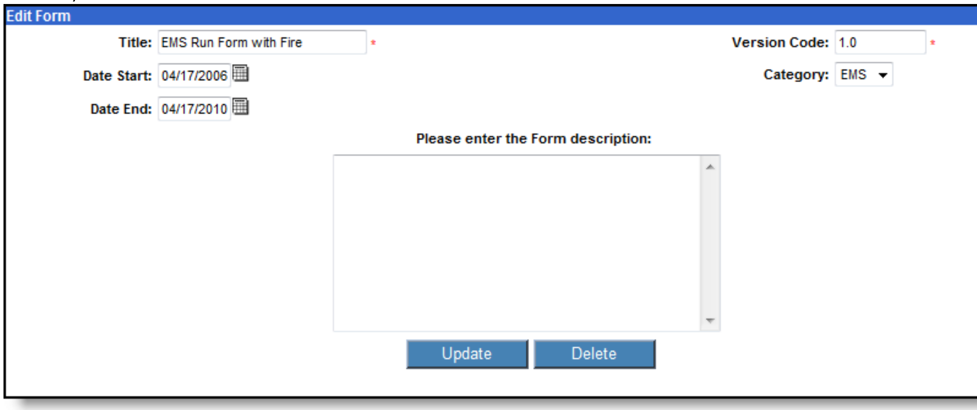


2. To rename a tab, in the correct *Tab Name* text box, type the new name.
3. To rearrange the order in which the tabs appear on a run form, in the *Order* text boxes, type the numbers corresponding to each item's desired placement.
4. To add a new tab,
    a. From the last row, In the *Tab Name* text box, type a name for the tab.
    b. In the *Order* text box, type the number corresponding to the new tab's desired position in the list of tabs.
    c. Click *Save.*
    d. Edit the fields available in the tab.
    HINT: For more information, please refer to *Working with Run Form Fields.*
5. When finished, to keep any changes, click *Save.*

Working with Summary Information

Summary information includes the title and description of the run form, the category in which it belongs (e.g., EMS or fire), the dates during which it should be available for use and the form's version. System administrators can alter this to make run forms conform to their needs.

1. Once the run form has been opened for editing, from the *I want to* drop down menu, click *Edit Form Information.*



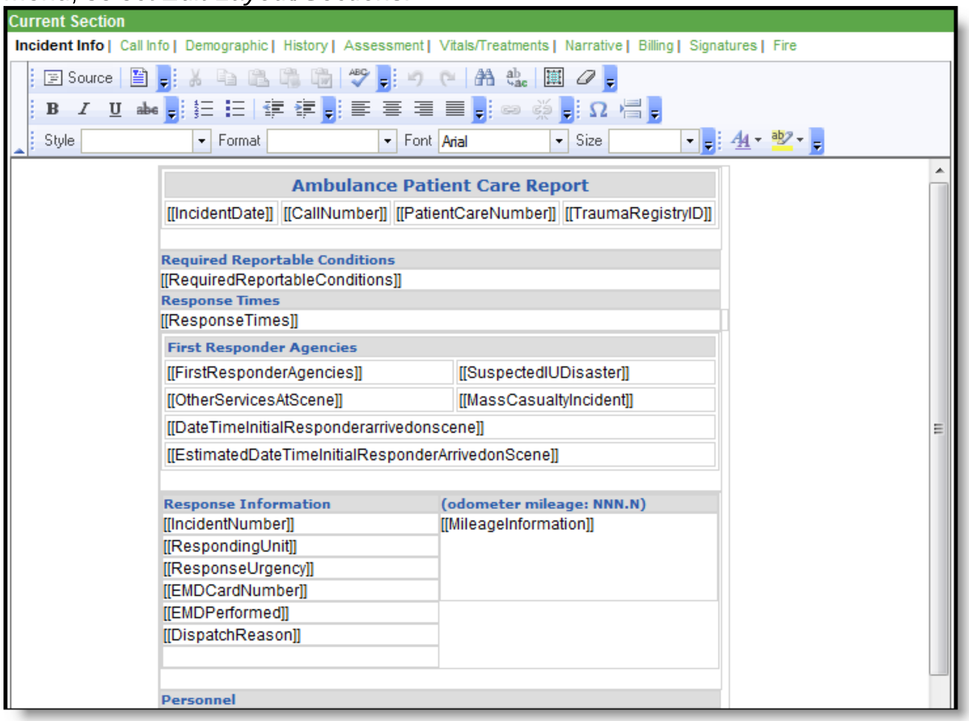
2. To change the name of the run form, in the *Title* text box, type the new title.
3. To change the dates during which this run form will be available for use, in the *Date Start* and *Date End* text boxes, enter the appropriate dates.

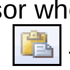
   HINT: To select the dates from a calendar, click the *Calendar* icon and select the correct date.
4. To change the version of the run form, in the *Version Code* text box, type the correct version.
5. To change the category of form, from the *Category* drop down menu, select the correct category.
6. To change the description of the form, in the *Please enter the Form description* text box, type the new description.
7. When finished, to save the information, click *Update.*

Working with Run Form Fields

System administrators can add, move or change the fields available in each tab of a run form. This provides a layout editor that allows system users to move or change information within the run form.

1. Once the run form has been opened for editing, from the *I want to* drop down menu, select *Edit Layout/Sections.*



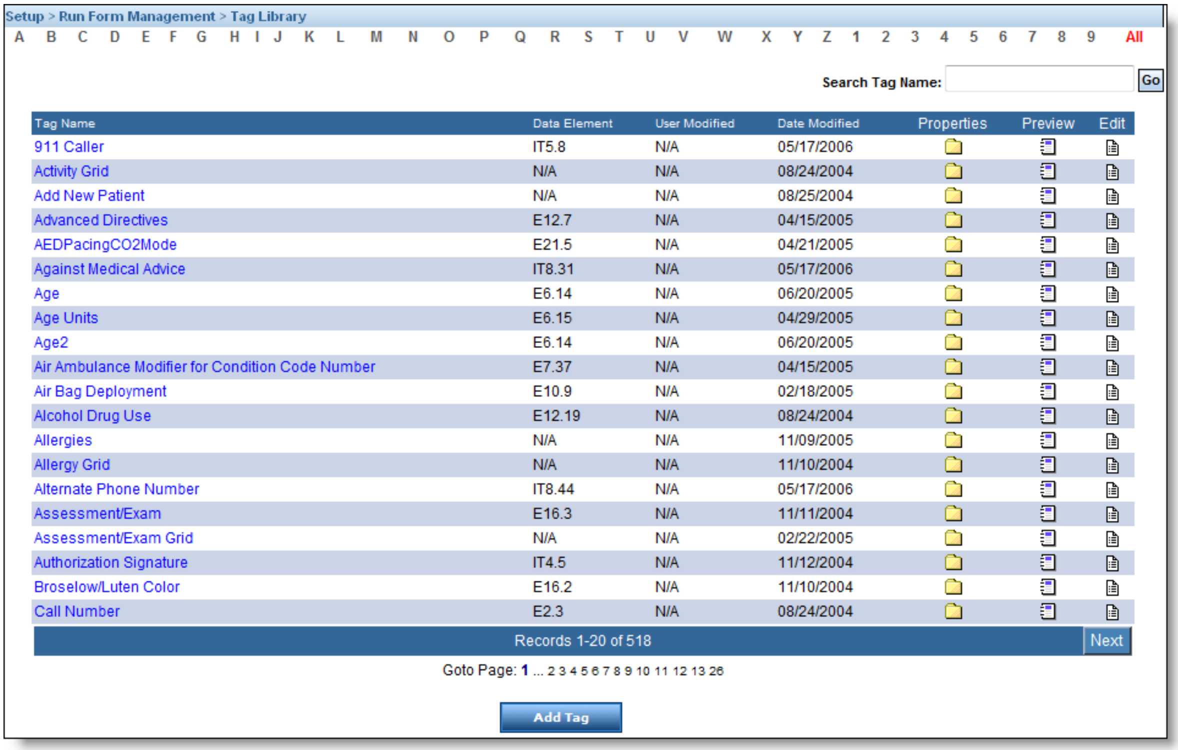
2. To select the tab on which to work, below the *Current Section* heading, select the correct tab.
3. To add any text to the run form, click and type where the text should appear.
4. To move a field,
   a. Click and drag to select the text for the field to move.
   b. Click the *Cut* button  from the page's toolbar or press *Ctrl* and *C* simultaneously on the keyboard.
   c. Click to place the cursor where the field should appear.
   d. Click the *Paste* button  from the page's toolbar or press *Ctrl* and *V* simultaneously on the keyboard.
5. To add a field, type the tag name in the location where the field should appear.
    **HINT:** To learn a tag name, view the field's properties in the tag library.
6. To change a field, delete the old tag name and type the new tag name.
7. When finished, click *Save.*

7.4 Working with Fields and Tags for Standard Run Forms

All fields that can be included in standard run forms are listed in the tag library. This section allows system administrators to view the tag name for use in run forms, to change the name of the field and to preview the field's appearance as it will display in a run form.

To open the tag library:

1. From the top right, click *Admin.*
2. Under *Run Forms,* click *Templates & Permissions.*
   A sub-menu appears.


Setup > Run Form Management > Tag Library

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

Search Tag Name: Go

Tag Name	Data Element	User Modified	Date Modified	Properties	Preview	Edit
911 Caller	IT5.8	N/A	05/17/2006			
Activity Grid	N/A	N/A	08/24/2004			
Add New Patient	N/A	N/A	08/25/2004			
Advanced Directives	E12.7	N/A	04/15/2005			
AEDPacingCO2Mode	E21.5	N/A	04/21/2005			
Against Medical Advice	IT8.31	N/A	05/17/2006			
Age	E6.14	N/A	06/20/2005			
Age Units	E6.15	N/A	04/29/2005			
Age2	E6.14	N/A	06/20/2005			
Air Ambulance Modifier for Condition Code Number	E7.37	N/A	04/15/2005			
Air Bag Deployment	E10.9	N/A	02/18/2005			
Alcohol Drug Use	E12.19	N/A	08/24/2004			
Allergies	N/A	N/A	11/09/2005			
Allergy Grid	N/A	N/A	11/10/2004			
Alternate Phone Number	IT8.44	N/A	05/17/2006			
Assessment/Exam	E16.3	N/A	11/11/2004			
Assessment/Exam Grid	N/A	N/A	02/22/2005			
Authorization Signature	IT4.5	N/A	11/12/2004			
Broselow/Luten Color	E16.2	N/A	11/10/2004			
Call Number	E2.3	N/A	08/24/2004			

Records 1-20 of 518 Next

Goto Page: 1 ... 2 3 4 5 6 7 8 9 10 11 12 13 26

Add Tag

3. To find a specific field, in the *Search Tag Name* text box, type the tag name and click *Go.*
4. To sort by first letter or number, click the correct letter or number at the top of the page.

Working with Field Properties

System administrators can view the tag name for a field or change the name of the field. The *Properties* window displays the name, tag name and description of the field, as well as the name of the file in which data from this field will be stored and the data element number of the field. Much of this information is related solely to the database and is not relevant to most users.

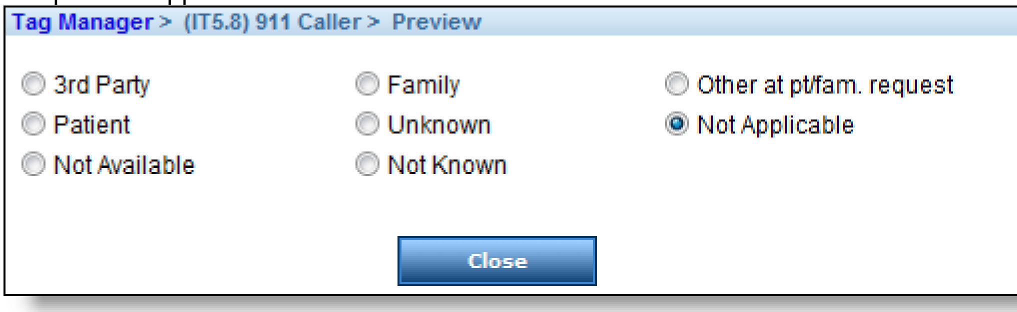
1. In the tag library, navigate to the desired field.
2. Click the field's hyperlinked name
   OR
   Click the corresponding *Properties* icon .
3. To change the name of the field, in the *Name* text field, type the new name.
4. When finished, click *Save.*

Previewing Fields

System administrators can preview fields as they will appear when displayed on a run form.

1. In the tag library, navigate to the desired field.

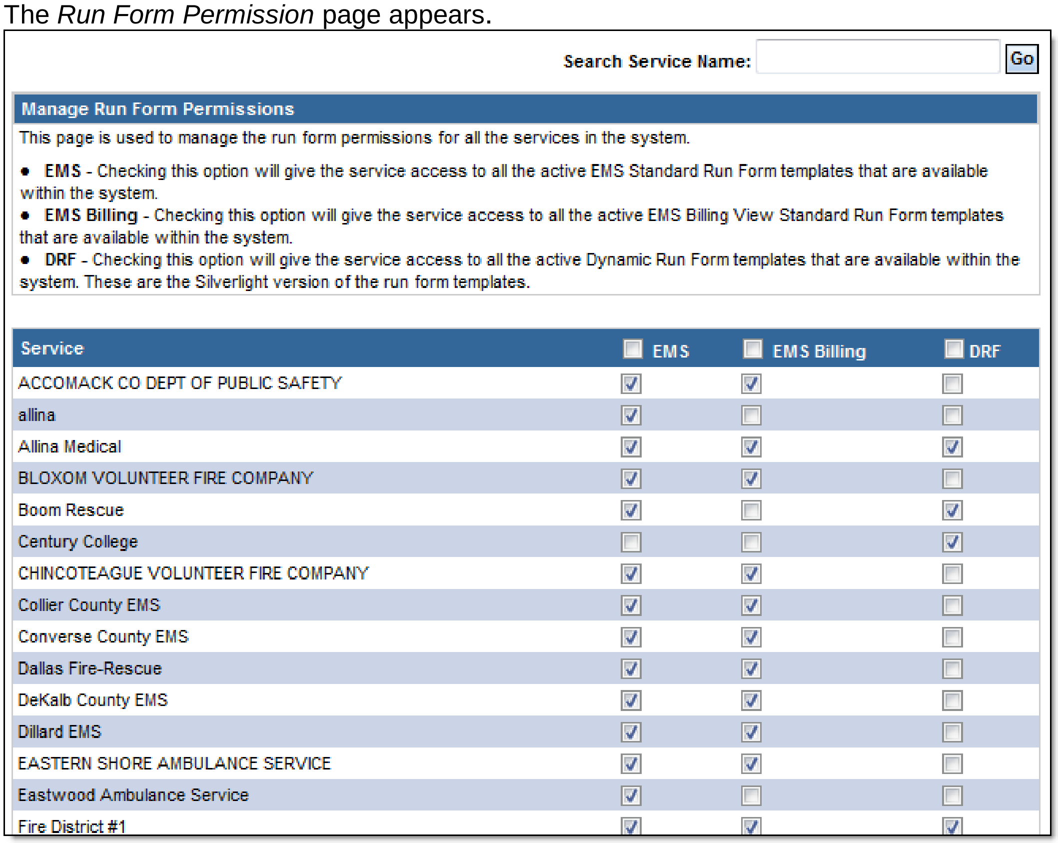
2. Click the corresponding *Preview* icon .
   The preview appears.



7.5 Setting Service Access to EMS System Run Forms

For several system run forms that are included with the State Bridge, you can define which services have access to them in one central location.

1. From the top right, click *Admin.*
2. Under *Run Forms,* click *Templates & Permissions.*
   A sub-menu appears.
3. Under *Templates & Permissions,* click *Run Form Permissions.*
   The *Run Form Permission* page appears.



Search Service Name: Go

Manage Run Form Permissions

This page is used to manage the run form permissions for all the services in the system.

- **EMS** - Checking this option will give the service access to all the active EMS Standard Run Form templates that are available within the system.
- **EMS Billing** - Checking this option will give the service access to all the active EMS Billing View Standard Run Form templates that are available within the system.
- **DRF** - Checking this option will give the service access to all the active Dynamic Run Form templates that are available within the system. These are the Silverlight version of the run form templates.

Service	EMS	EMS Billing	DRF
ACCOMACK CO DEPT OF PUBLIC SAFETY	✓	✓	
allina	✓		
Allina Medical	✓	✓	✓
BLOXOM VOLUNTEER FIRE COMPANY	✓	✓	
Boom Rescue	✓		✓
Century College			✓
CHINCOTEAGUE VOLUNTEER FIRE COMPANY	✓	✓	
Collier County EMS	✓	✓	
Converse County EMS	✓	✓	
Dallas Fire-Rescue	✓	✓	
DeKalb County EMS	✓	✓	
Dillard EMS	✓	✓	
EASTERN SHORE AMBULANCE SERVICE	✓	✓	
Eastwood Ambulance Service	✓		
Fire District #1	✓	✓	✓

4. For each run form to be available for a service, select the corresponding checkbox.
   HINTS:
   Selecting the *EMS* option will give the selected services access to all active EMS standard run form templates.
   Selecting the *EMS Billing* option will give the selected services access to all active EMS billing

view standard run form templates.
Selecting the *DRF* option will give the selected services access to all active dynamic run form templates within the system.

5. From the bottom of the page, click *Save.*

7.6 Setting Up System Controls

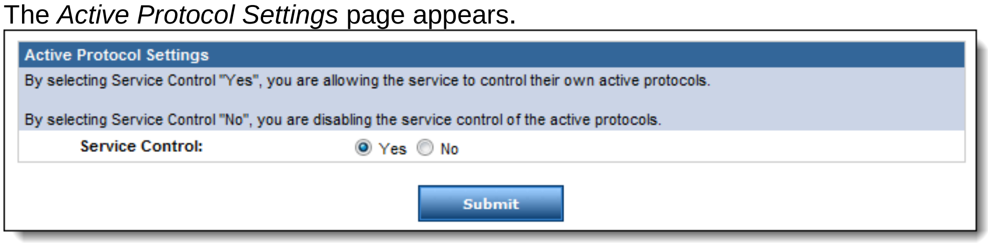
System controls allow the system administrator to configure certain settings for all services, including run locking and audit tracking, or to allow services to configure their own settings. If you set up any of these controls at the system level, service administrators will not be able to make any changes or additions to those settings for their own services.

Setting Up Active Protocols

Administrators can create and edit active protocols if necessary. An active protocol can be defined for any provider impression, and will help to guide staff members through performing and documenting any standard procedure. Each active protocol will provide a list of standard steps, will open any commonly provided power tools and will fill in any standard information. If a situation differs from the norm, staff members can still skip steps and provide an explanation or can change the standard values.

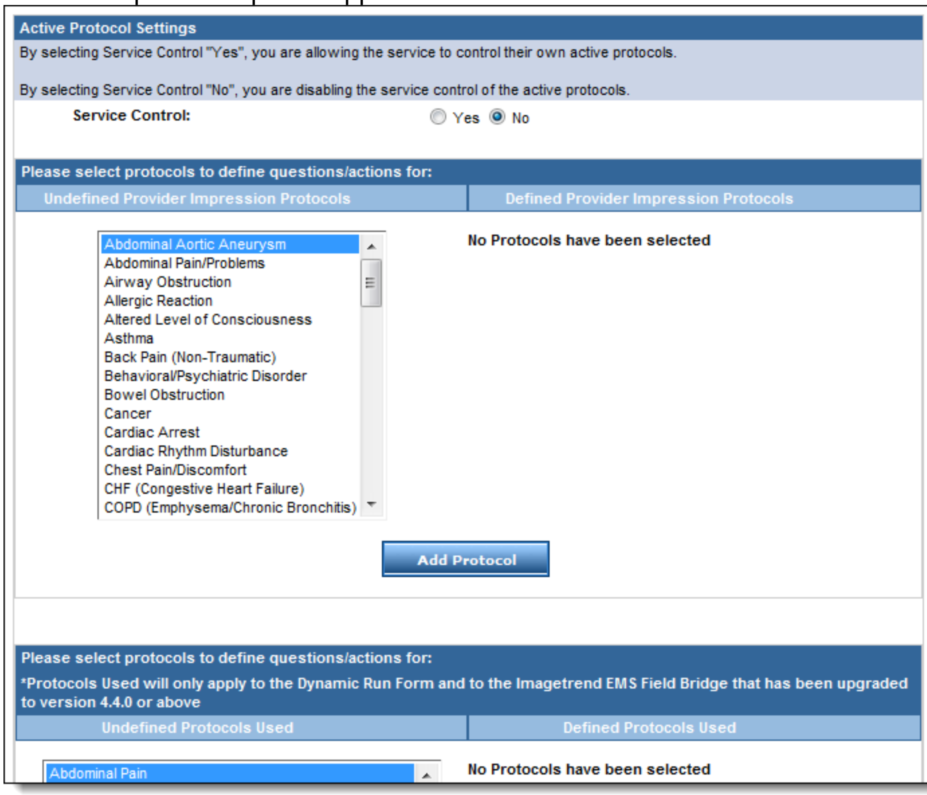
Administrators can set up new active protocols for use on the EMS Field Bridge and with dynamic run forms. There are two different lists of active protocols that can be set up; you can set up protocols from both lists and they will be available for use.

1. From the top right, click *Admin.*
2. Under *Run Forms,* click *System Controls.*
   A sub-menu appears.
3. Under *System Controls,* click *Active Protocol.*
   The *Active Protocol Settings* page appears.



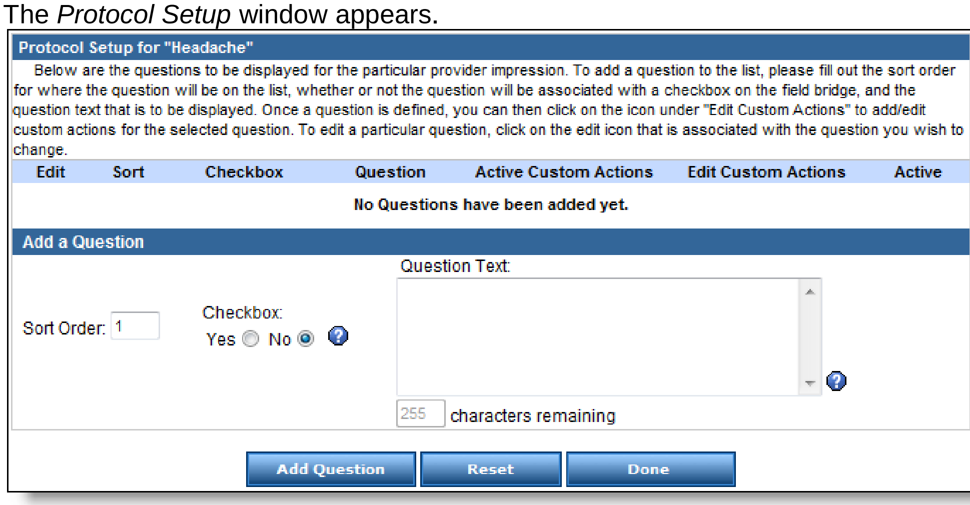
4. To allow individual services to set up active protocols, in the *Service Control* section, select *Yes.*
   OR
   To set up active protocols for all services,

a. In the *Service Control* section, select *No.*
The active protocol options appear.



b. From the *Undefined Provider Impression Protocols* scroll list or the *Undefined Protocols Used* scroll list, select the impression to which the protocol will apply.

c. Click *Add Protocol.*
The *Protocol Setup* window appears.



d. To create an item on the protocol checklist,
   i. In the *Checkbox* section, select *Yes.*
   ii. In the *Question Text* text box, type the text for the item.
   iii. To determine where in the checklist the item will appear, in the *Sort Order* text box, type the number of the item's position.
   iv. When the item is ready, click *Add Question.*
   The item appears in the *Protocol Setup for "(Impression)"* section.
   v. To create a custom action, click the *Edit Custom Actions* icon .

vi. From the *Category* drop down menu, select the type of action that will be completed.
vii. From the *Action Name* drop down menu, select the action that should be performed in the Field Bridge.
viii. When finished, click *Add Action.*
ix. To add another action for this step, repeat steps f–h.

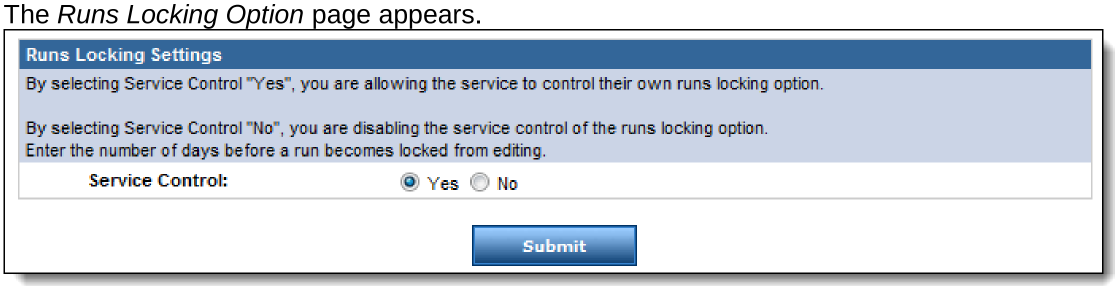
e. To add more items on the protocol checklist, repeat step 7.
f. When finished, to save the protocol, click *Done.*
g. Repeat steps b–f until all desired protocols are added.

5. When finished, click *Submit.*

Setting Up Run Locking

You can choose to automatically lock runs for editing a certain number of days after they are created.

1. From the top right, click *Admin.*
2. Under *Run Forms,* click *System Controls.*
   A sub-menu appears.
3. Under *System Controls,* click *Runs Locking.*
   The *Runs Locking Option* page appears.



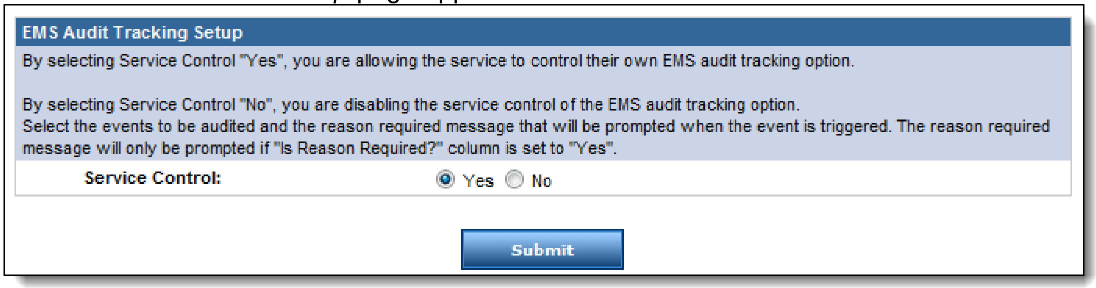
4. To allow individual services to set up run locking, in the *Service Control* section, select *Yes.*
   OR
   To set up run locking for all services,
   a. In the *Service Control* section, select *No.*
      The run locking options appear.
   b. In the *Number of Days* text box, type the number of days that should pass before a run is locked.
5. Click *Submit.*

Setting Up Audit Tracking

Each service administrator can set up which events will require be tracked for auditing and which will request or require a reason for users performing the event.

1. From the top right, click *Admin.*
2. Under *Run Forms,* click *System Controls.*
   A sub-menu appears.
3. Under *System Controls,* click *Audit Tracking.*
   The *Audit Tracking* page appears.

The *EMS Audit Events Setup* page appears.



4. To allow individual services to set up audit tracking, in the *Service Control* section, select *Yes.*
   OR
   To set up run locking for all services,
   a. In the *Service Control* section, select *No.*
      The audit tracking options appear.
   b. To require users who generate a PDF report to enter a reason for doing so,
      i. In the *Generate PDF Reports* section, in the *Is Reason Required* column, select *Yes.*
      ii. In the *Reason Required Message* text box, type the message that should appear to prompt users to add a reason.
   c. To track users who view existing reports online, in the *View Existing Online Report* section, click *Active.*
   d. To require users who view existing reports online to enter a reason for doing so,
      i. In the *View Existing Online Report* section, in the *Is Reason Required* column, select *Yes.*
      ii. In the *Reason Required Message* text box, type the message that should appear to prompt users to add a reason.
   e. 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.
   f. To require users who make changes to a report that was marked as completed to enter a reason for doing so,
      i. In the *Track All Changes After Completed* section, in the *Is Reason Required* column, select *Yes.*
      ii. In the *Reason Required Message* text box, type the message that should appear to prompt users to add a reason.
   g. To keep track of any user who generates a batch print, in the *Generate Batch Prints* section, select *Active.*
   h. To require users who generate a batch print to record a reason for doing so,
      i. In the *Generate Batch Prints* section, in the *Is Reason Required* column, select *Yes.*
      ii. In the *Reason Required Message* text box, type the message that should appear to prompt users to add a reason.
   i. 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.
   j. To automatically update the run report's status when it is marked for completion for auditing,
      i. In the *Update Status Upon Marking Run as Completed* section, select *Yes.*
      ii. 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.

5. When finished, click *Submit.*

CHAPTER 8

TRAINING AND ACTIVITY SETUP

8.1 Chapter Summary

Administrators can set up templates for activity and training records, categories to organize the templates and training requirements for each type of staff member. This chapter explains how to set up categories for activities and training templates, create or edit templates and set the required hours of training for staff members.

8.2 Working with Training and Activity Categories

Categories allow administrators to sort templates based on the type of activity or 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).

Viewing and Editing Categories

When editing a category that has subcategories, the sub-categories must be removed before editing is possible. Categories for both activities and training will be displayed. 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 each category relates to activities or training and whether the category is active in the system or not.

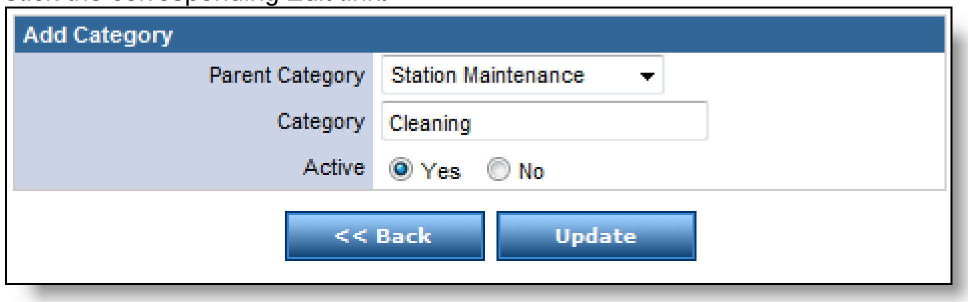
1. From the upper right, click *Admin.*
2. Under *Run Forms,* click *Activity & Training.*
   A sub-menu appears.
3. Under *Activity & Training,* click *Manage Categories.*
   The *Manage Categories* page appears.

Training Categories	Active	Action	Permissions
EMS Course Work		Edit	
Continued Education		Edit	
CPR		Edit	
CPR 2		Edit	
EMT Basic		Edit	
EMT Defibrillation		Edit	
EMT Intermediate		Edit	
EMT Paramedic		Edit	
First Responder Ambulance		Edit	
Fire Training		Edit	
Hazmat Awareness		Edit	
Hazmat Ops		Edit	
First Responder Training		Edit	
First Responder Initial Class		Edit	
Report Writing		Edit	
Rescue		Edit	
High Angle		Edit	

Add Training Category

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.*

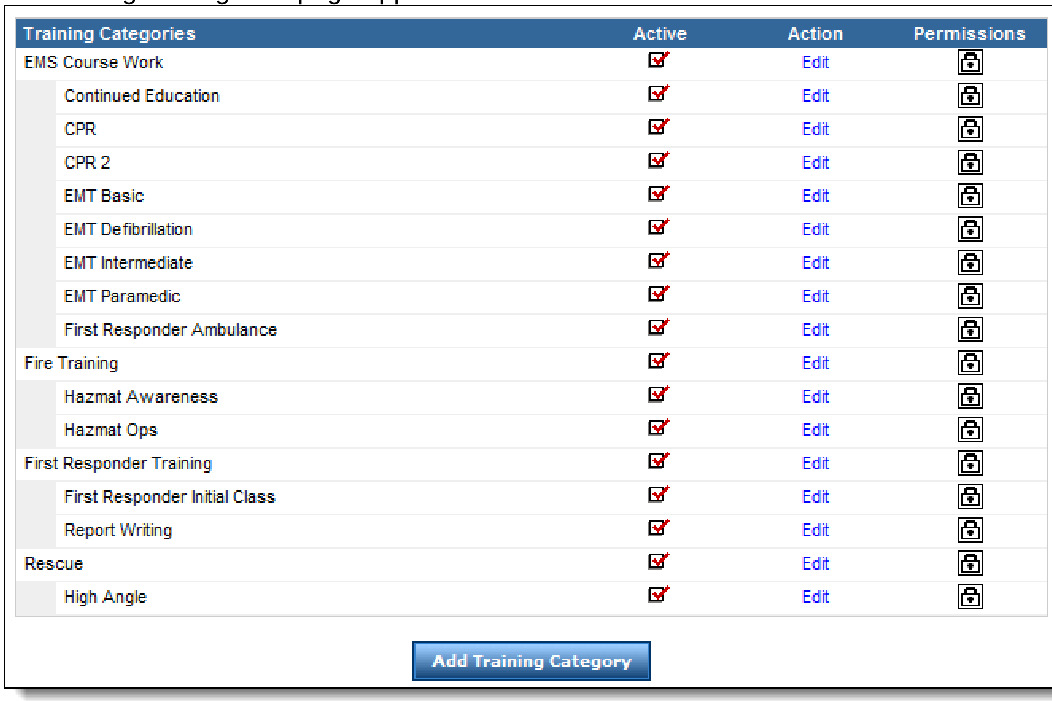
5. To edit a parent category,
   a. Edit all sub-categories and move them to another parent category.
   b. For the category, click *Edit.*
   c. If this category will remain a parent category, from the *Parent Category* drop down menu, select *NONE.*
   If this category will become a sub-category, from 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 *Admin.*
2. Under *Run Forms,* click *Activity & Training.*
   A sub-menu appears.

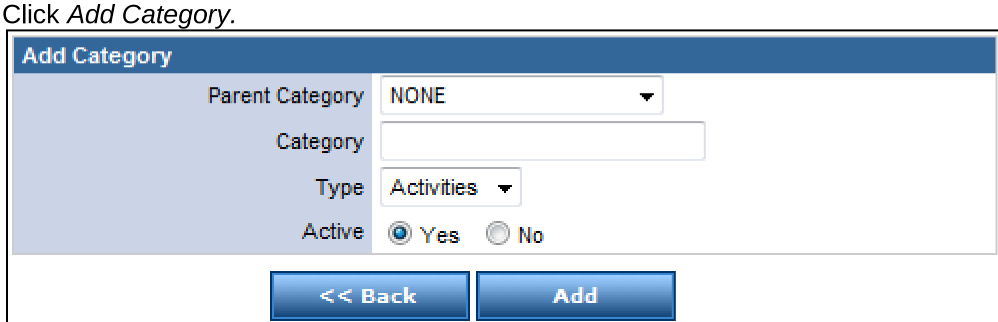
3. Under *Activity & Training,* click *Manage Categories.*
   The *Manage Categories* page appears.



Training Categories	Active	Action	Permissions
EMS Course Work		Edit	
Continued Education		Edit	
CPR		Edit	
CPR 2		Edit	
EMT Basic		Edit	
EMT Defibrillation		Edit	
EMT Intermediate		Edit	
EMT Paramedic		Edit	
First Responder Ambulance		Edit	
Fire Training		Edit	
Hazmat Awareness		Edit	
Hazmat Ops		Edit	
First Responder Training		Edit	
First Responder Initial Class		Edit	
Report Writing		Edit	
Rescue		Edit	
High Angle		Edit	

Add Training Category

4. Click *Add Category.*



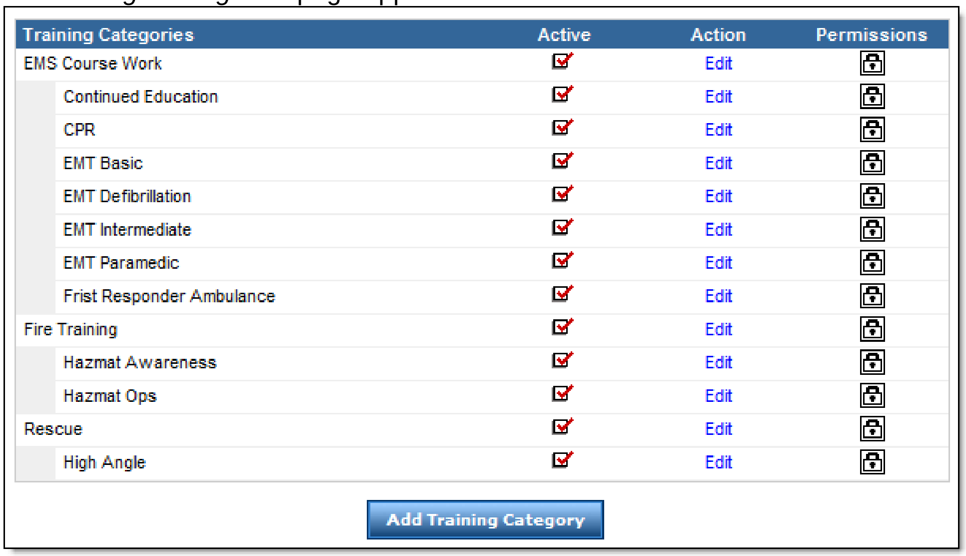
5. From the *Parent Category* drop down menu, select the desired option.
   HINT: If the new category will be a parent category, select *NONE.*
   If the new category will be a sub-category, select the category under which it should stored.
6. In the *Category* text box, type the name of the category.
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

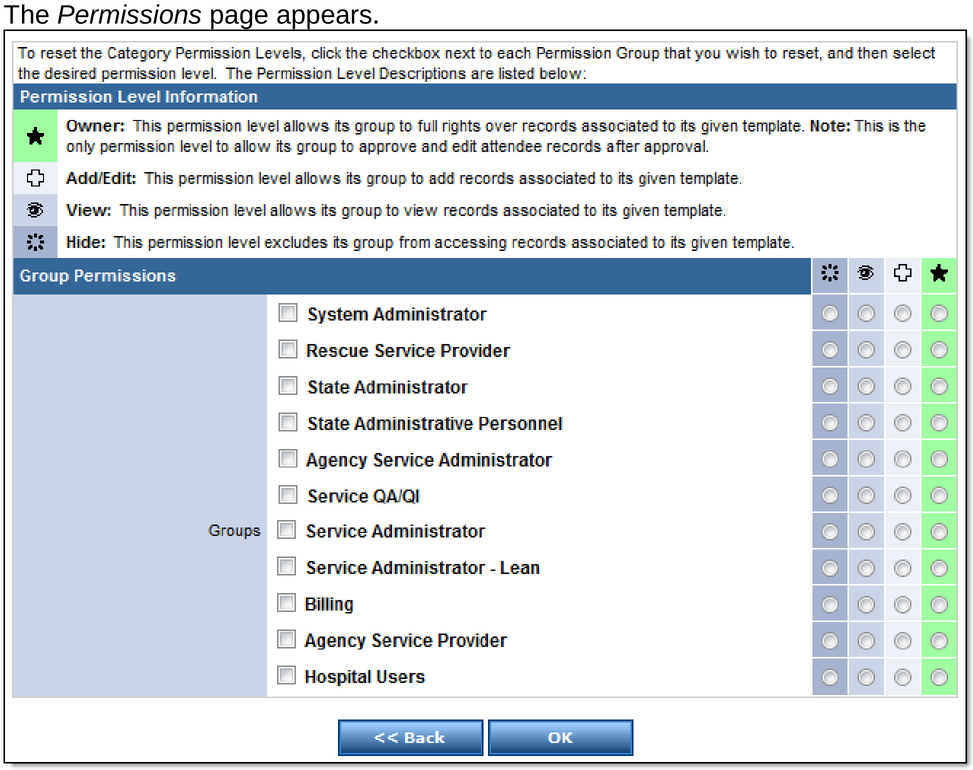
Administrators can control which permission groups will have access to this category and to templates within this category.

1. From the upper right, click *Admin.*

2. Under *Run Forms,* click *Activity & Training.*
   A sub-menu appears.
3. Under *Activity & Training,* click *Manage Categories.*
   The *Manage Categories* page appears.



4. Click the *Permissions* icon for the desired category.
   The *Permissions* page appears.



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.*

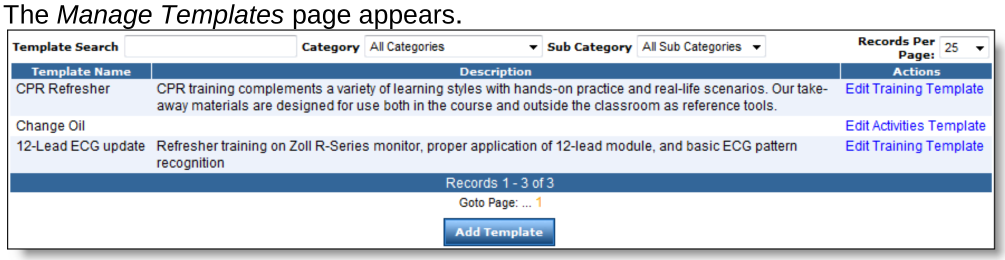
8.3 Working with Templates

Each training or activity 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.

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 *Admin.*
2. Under *Run Forms,* click *Activity & Training.*
   A sub-menu appears.
3. Under *Activity & Training,* click *Manage Templates.*
   The *Manage Templates* page appears.



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

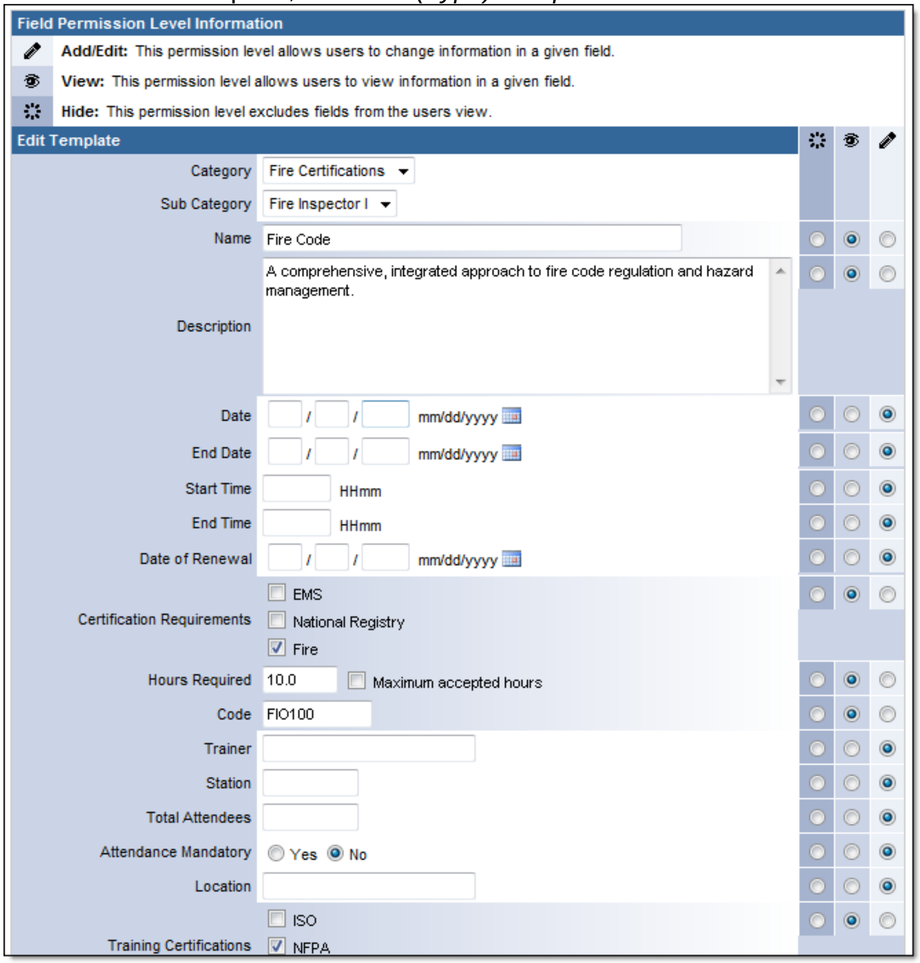
Template Name	Description	Actions
CPR Refresher	CPR training complements a variety of learning styles with hands-on practice and real-life scenarios. Our take-away materials are designed for use both in the course and outside the classroom as reference tools.	Edit Training Template
Change Oil		Edit Activities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

Records 1 - 3 of 3

Goto Page: ... 1

Add Template

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



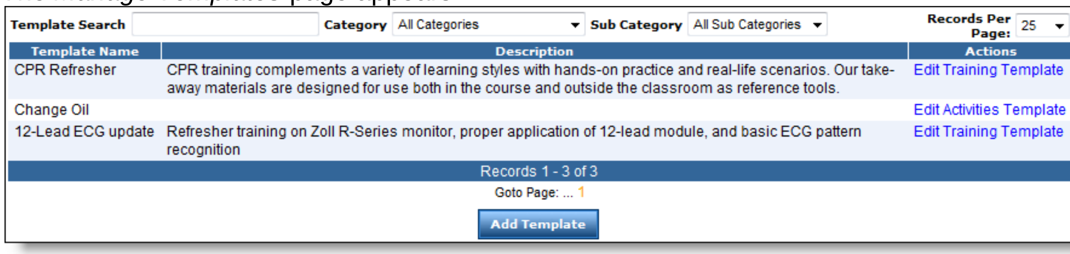
5. To designate access to each aspect of the template when records are created from it, select the correct level of permission for each aspect.
   NOTE: This will select whether this information will be available to view or edit when individual records are created.
6. To change information within the 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.*

Adding New Templates

Administrators can set up new templates for training or activity records.

1. From the upper right, click *Admin.*
2. Under *Run Forms,* click *Activity & Training.*
   A sub-menu appears.

3. Under *Activity & Training,* click *Manage Templates.*
   The *Manage Templates* page appears.



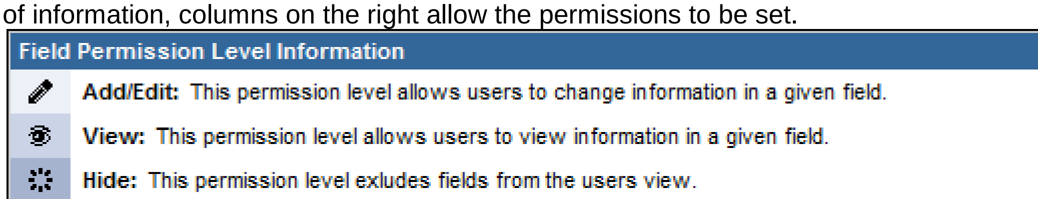
1. Click *Add Template.*
2. To designate access to each aspect of the template when records are created from it, select the correct level of permission for each aspect.
   NOTE: This will select whether this information will be available to view or edit when individual records are created.
3. Using the provided fields, enter information for the template.
4. 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.
5. When finished, to keep the template, click *OK.*
   To return to the list of templates without saving, click *Back.*

Template Options

The information in a template is copied to any records created from that template. Each piece of information can be set to be hidden, fixed or changeable in records created from the template, and administrators can define which permission groups will be able to make changes on records created from the template. These options can be made when the template is open for editing, either when an existing template has been opened or when a new template is created. Not all fields need to be completed.

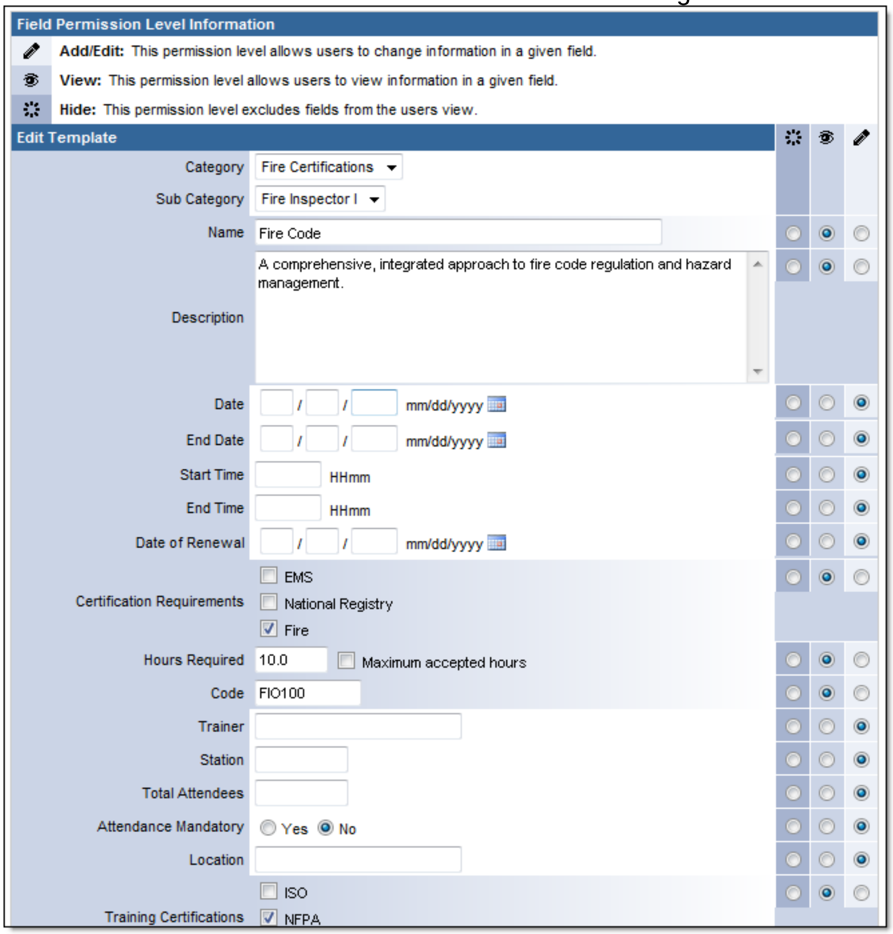
Field Permission Level Information

Administrators can indicate whether users will be able to view or edit each piece of information in the template when records are created from the template. For each piece of information, columns on the right allow the permissions to be set.



Add/Edit Template

Each field contains information that will be used in creating records from this template.



Category

Assigns the template to a category for organization. This also defines whether the template is for an activity or training event.

Sub Category

If desired, assigns the template to a sub-category for organization.

Name

Creates a name for the template.

Description

Creates a description to contain more detailed information about the template.

Date

Assigns the day that the training or activity will begin.

End Date

Assigns the day that the training or activity will be completed.

Start Time

Assigns the time of day at which the training or activity will begin.

End Time
Assigns the time of day at which the training or activity will be completed.

Date of Renewal
If the training or activity needs to be completed repeatedly after a particular interval, defines the date by which it must be completed again.

Certification Requirements
If this training or activity will earn credit towards a particular certification, selects the certification towards which it counts. The number of hours required for the certification is created in the *Requirements* section.

Hours Required
If a particular number of training and/or activities hours is needed using this record, enter the number of hours.

Maximum accepted hours
If only the number of hours specified in the *Hours Required* text box is allowed, select the *Maximum accepted hours* checkbox.

Code
Records a code for records using the template/

Trainer
If a particular person will be conducting or supervising the activity of training, adds their name to the records.

Station
If the template is particular to a station, defines the station to which it applies.

Total Attendees
If the exact number of attendees is known, defines the number.

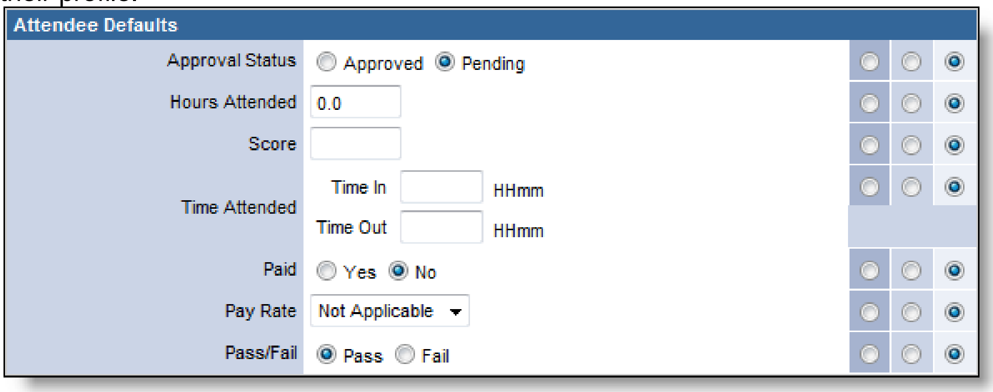
Attendance Mandatory
Specifies whether staff members are required to attend activities or training created from this template.

Location
Specifies where the activity or training will take place.

Training Certifications
Organizes the hours by marking them as pertaining to specific certifications.

Attendee Defaults

When staff members are marked as attending a training or activity, it can be recorded in their profile.



Approval Status
Sets records to be automatically approved and added to the staff members' profiles or marked as pending until an administrator approves them.

Hours Attended
Determines how many hours of training or an activity will be recorded in the staff members' profiles.

Score
For graded training or activities, sets a grade or score to appear on the staff members' profiles.

Time Attended
Sets specific times to be recorded in the staff members' profiles for attendance of the training or activity.

Paid
Records whether staff members were paid for this event.

Pay Rate
If staff members are paid for the training or activity, records the rate at which they will be paid.

Pass/Fail
Determines whether the record on staff members' profiles will automatically be marked as passing or failing.

Permission Level Information

Different user groups can be given different access to the template and records created from the template. When combined with the permission levels assigned to each aspect of the template profile, if permissions differ, the lower permission will always be granted.

Permission Level Information
Owner: This permission level allows its group to full rights over records associated to its given template. **Note:** This is the only permission level to allow its group to approve and edit attendee records after approval.
Add/Edit: This permission level allows its group to add records associated to its given template.
View: This permission level allows its group to view records associated to its given template.
Hide: This permission level exludes its group from accessing records associated to its given template.

Group Permissions

Sets the level of access that each user group will have to the template and records created from the template.

Group Permissions		Hide	View	Add/Edit	Owner
Groups	Administrative Level 1	○	○	○	●
	Administrator Level 2	○	○	○	●
	FIRE ADMIN	○	○	○	●
	Rescue Service Administrator	○	○	●	○
	Rescue Service Provider	○	●	○	○
	Rescue Service NFIRS & Inventory	○	●	○	○
	Rescue Service - NFIRS & INSPECTIONS	○	●	○	○
	Rescue Service - NFIRS Only	○	●	○	○

8.4 Working with Certification Requirements

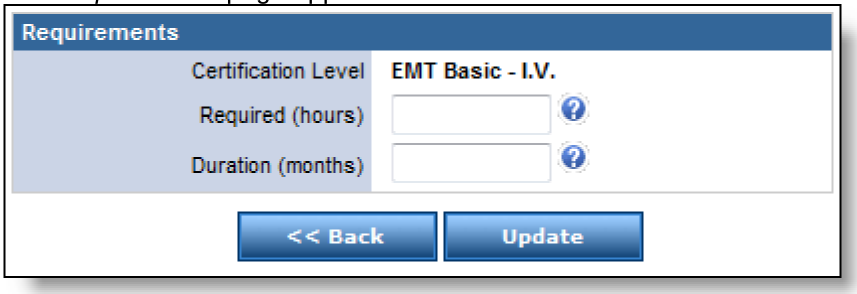
If staff members are required to complete a certain number of hours of training in order to maintain a particular certification, administrators can store that information in the system so that training hours saved in their profiles apply towards those certifications. System administrators can set the number of hours required and the number of months for which the certification will be valid.

1. From the upper right, click *Admin.*
2. Under *Run Forms,* click *Activity & Training.*
   A sub-menu appears.

3. Under *Activity & Training,* click *Requirements.*
   The *Manage Requirements* page appears.

Training	Required Hours	Duration	Active
Certification Level			
EMT-Intermediate	272	3	☑
EMT-Basic	200	2	☑
Not Recorded	12	12	☑
EMT Basic - I.V.	12	12	☑
Not Reporting			☑
Other Healthcare Professional			☑
EMT-Paramedic			☑
Other Non-Healthcare Professional			☑
First Responder			☑
Student			☑
Nurse			☑
Physician			☑
Not Applicable			☑
Not Known			☑
Not Available			☑

4. To view or edit the requirements for a certification type, click the desired certification level.
   The *Requirements* page appears.



5. In the *Required (hours)* text box, type the number of training hours that is required for this certification.
6. In the *Duration (months)* text box, type the number of months for which this certification will be valid after all training hours are completed.
7. When finished, to save the changed, click *Update.*
   To return to the list of certification levels without saving, click *Back.*

CHAPTER 9

ADDITIONAL MODULE AND APPLICATION SETTINGS

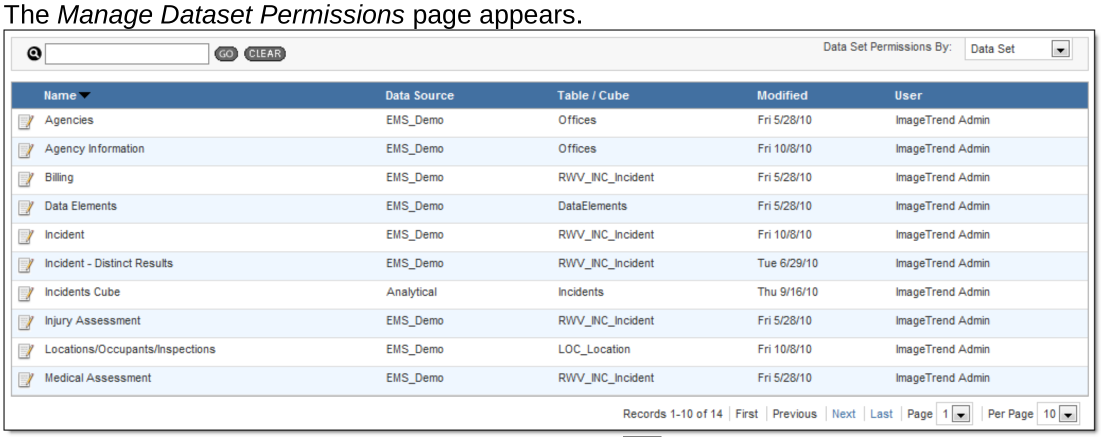
9.1 Chapter Overview

Within the *Admin* section, you can configure access and various settings to additional modules such as Field Bridge and the Report Writer. This chapter explains how to set up access to data sets, display options and standard reports in the Report Writer, as well as how to configure inspection forms and types and how to control updates for the Field Bridge.

9.2 Setting Up Access to Datasets

You can control which permission groups will have access to which datasets for creating transactional reports.

1. From the upper right, click *Admin.*
2. Under *Product Settings,* click *Report Writer 2.0.*
   A sub-menu appears.
3. Under *Report Writer 2.0,* click *Dataset Permissions.*
   The *Manage Dataset Permissions* page appears.

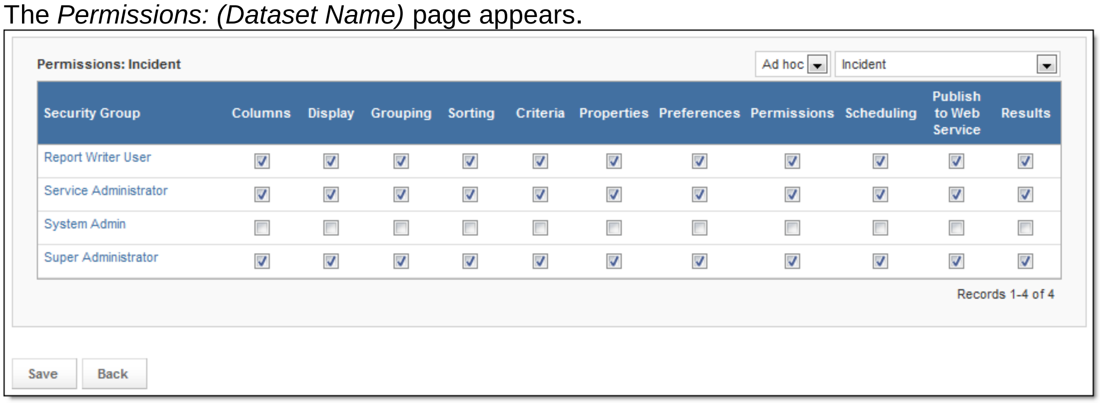


GO CLEAR | Data Set Permissions By: Data Set

Name	Data Source	Table / Cube	Modified	User
Agencies	EMS_Demo	Offices	Fri 5/28/10	ImageTrend Admin
Agency Information	EMS_Demo	Offices	Fri 10/8/10	ImageTrend Admin
Billing	EMS_Demo	RWV_INC_Incident	Fri 5/28/10	ImageTrend Admin
Data Elements	EMS_Demo	DataElements	Fri 5/28/10	ImageTrend Admin
Incident	EMS_Demo	RWV_INC_Incident	Fri 10/8/10	ImageTrend Admin
Incident - Distinct Results	EMS_Demo	RWV_INC_Incident	Tue 6/29/10	ImageTrend Admin
Incidents Cube	Analytical	Incidents	Thu 9/16/10	ImageTrend Admin
Injury Assessment	EMS_Demo	RWV_INC_Incident	Fri 5/28/10	ImageTrend Admin
Locations/Occupants/Inspections	EMS_Demo	LOC_Location	Fri 10/8/10	ImageTrend Admin
Medical Assessment	EMS_Demo	RWV_INC_Incident	Fri 5/28/10	ImageTrend Admin

Records 1-10 of 14 | First | Previous | Next | Last | Page 1 | Per Page 10

4. For the desired dataset, click the *View and Edit* icon .
   The *Permissions: (Dataset Name)* page appears.



Permissions: Incident | Ad hoc | Incident

Security Group	Columns	Display	Grouping	Sorting	Criteria	Properties	Preferences	Permissions	Scheduling	Publish to Web Service	Results
Report Writer User	☑	☑	☑	☑	☑	☑	☑	☑	☑	☑	☑
Service Administrator	☑	☑	☑	☑	☑	☑	☑	☑	☑	☑	☑
System Admin	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐
Super Administrator	☑	☑	☑	☑	☑	☑	☑	☑	☑	☑	☑

Records 1-4 of 4

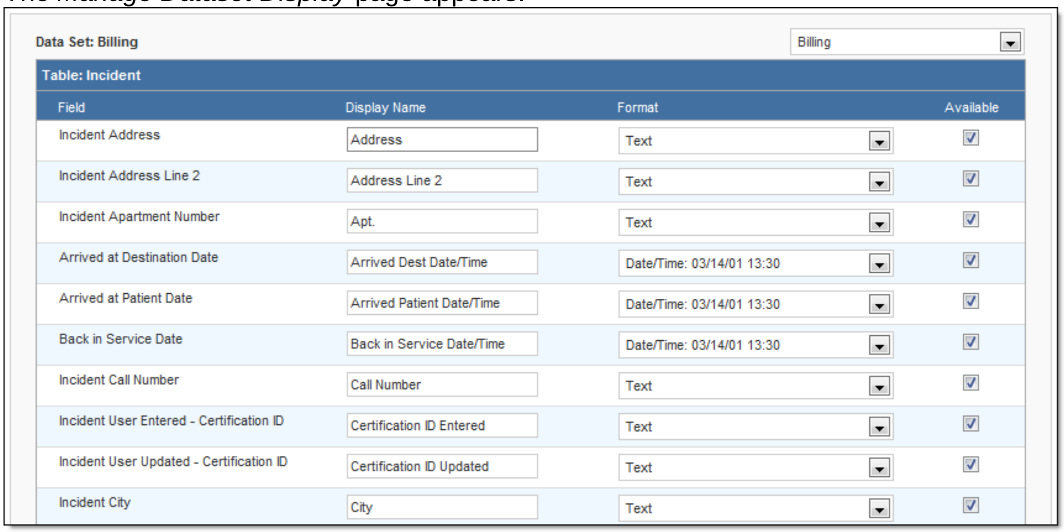
Save Back

5. For each permission group, select the checkbox(es) for all steps of the reporting process that should be available when working with this dataset.
6. When finished, click *Save.*

9.3 Managing Display Options

Administrators can control the display options for individual fields within a dataset. This allows you to change the name of the field that will appear to Report Writer 2.0 users as well as allowing you to hide specific fields if you do not want them to be included in any reports.

1. From the upper right, click *Admin.*
2. Under *Product Settings,* click *Report Writer 2.0.*
   A sub-menu appears.
3. Under *Report Writer 2.0,* click *Dataset Display.*
   The *Manage Dataset Display* page appears.



Data Set: Billing — Billing

Table: Incident

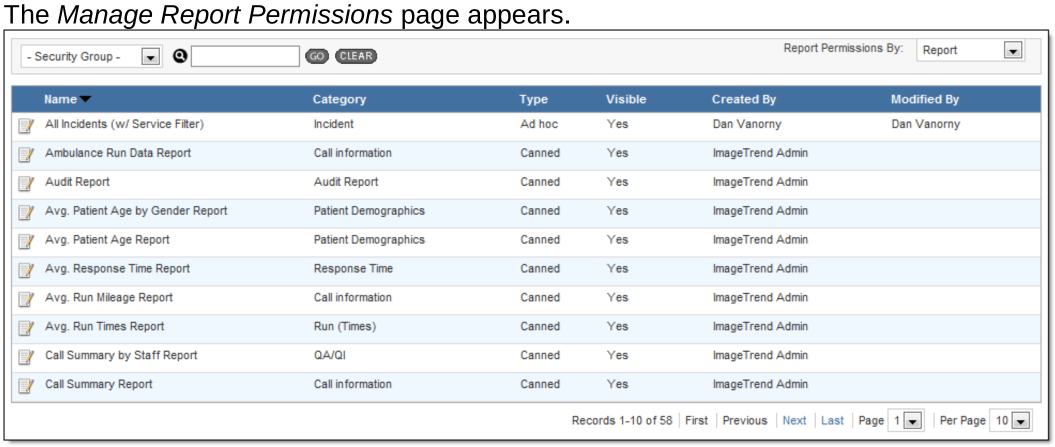
Field	Display Name	Format	Available
Incident Address	Address	Text	☑
Incident Address Line 2	Address Line 2	Text	☑
Incident Apartment Number	Apt.	Text	☑
Arrived at Destination Date	Arrived Dest Date/Time	Date/Time: 03/14/01 13:30	☑
Arrived at Patient Date	Arrived Patient Date/Time	Date/Time: 03/14/01 13:30	☑
Back in Service Date	Back in Service Date/Time	Date/Time: 03/14/01 13:30	☑
Incident Call Number	Call Number	Text	☑
Incident User Entered - Certification ID	Certification ID Entered	Text	☑
Incident User Updated - Certification ID	Certification ID Updated	Text	☑
Incident City	City	Text	☑

4. To change the name of a field as it will appear to Report Writer 2.0 users, in the *Display Name* text box for the field, make the desired changes.
5. To hide a field so it cannot be reported upon, deselect the corresponding *Available* checkbox.
6. From the bottom of the page, click *Save.*

9.4 Managing Access to Standard Reports

You can control which Report Writer 2.0 permission groups will have access to change information when running standard reports for each report that is saved in the system.

1. From the upper right, click *Admin.*
2. Under *Product Settings,* click *Report Writer 2.0.*
   A sub-menu appears.
3. Under *Report Writer 2.0,* click *Report Permissions.*
   The *Manage Report Permissions* page appears.

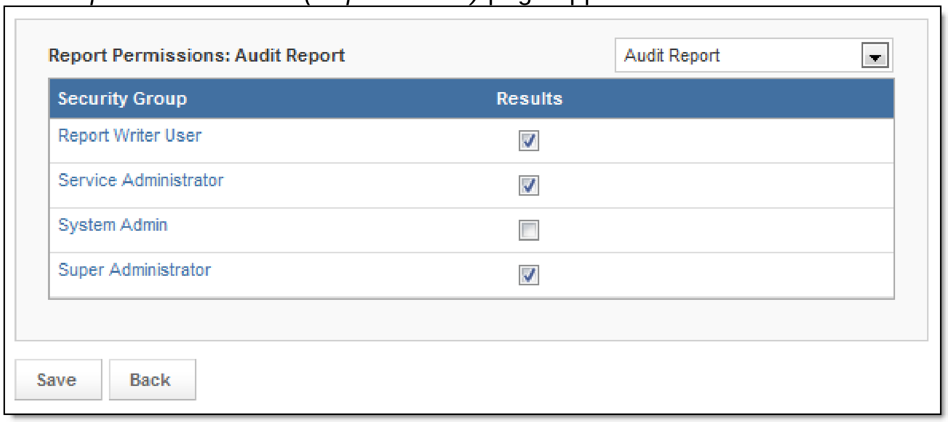


- Security Group - GO CLEAR — Report Permissions By: Report

Name	Category	Type	Visible	Created By	Modified By
All Incidents (w/ Service Filter)	Incident	Ad hoc	Yes	Dan Vanorny	Dan Vanorny
Ambulance Run Data Report	Call information	Canned	Yes	ImageTrend Admin	
Audit Report	Audit Report	Canned	Yes	ImageTrend Admin	
Avg. Patient Age by Gender Report	Patient Demographics	Canned	Yes	ImageTrend Admin	
Avg. Patient Age Report	Patient Demographics	Canned	Yes	ImageTrend Admin	
Avg. Response Time Report	Response Time	Canned	Yes	ImageTrend Admin	
Avg. Run Mileage Report	Call information	Canned	Yes	ImageTrend Admin	
Avg. Run Times Report	Run (Times)	Canned	Yes	ImageTrend Admin	
Call Summary by Staff Report	QA/QI	Canned	Yes	ImageTrend Admin	
Call Summary Report	Call information	Canned	Yes	ImageTrend Admin	

Records 1-10 of 58 | First | Previous | Next | Last | Page 1 | Per Page 10

4. For the desired report, click the *View and Edit* icon .
   The *Report Permissions: (Report Name)* page appears.

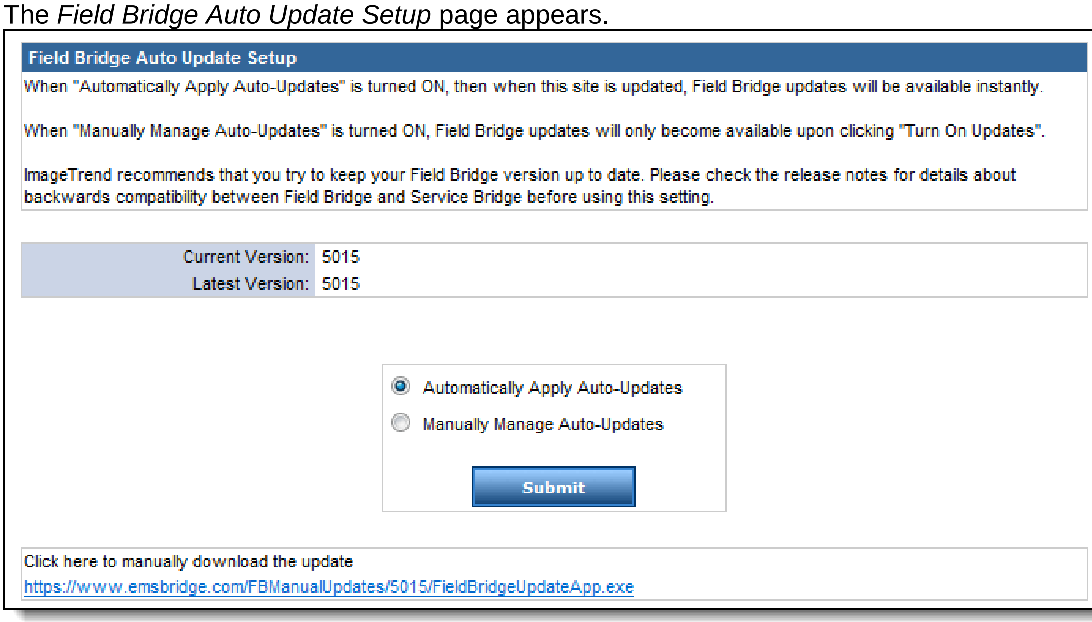


5. For each permission group, select the checkbox(es) for all steps of the reporting process that should be available when working with this report.
6. When finished, click *Save.*

9.5 Setting Up Field Bridge Automatic Updates

As the system administrator, you can choose whether Field Bridge updates should be available to all Field Bridge systems as soon as they are released to your State Bridge, or whether you want to control when individual updates are available.

1. From the upper right, click *Admin.*
2. Under *Site Management,* click *Settings.*
   A sub-menu appears.
3. Under *Settings,* click *Field Bridge Auto Update Setup.*
   The *Field Bridge Auto Update Setup* page appears.



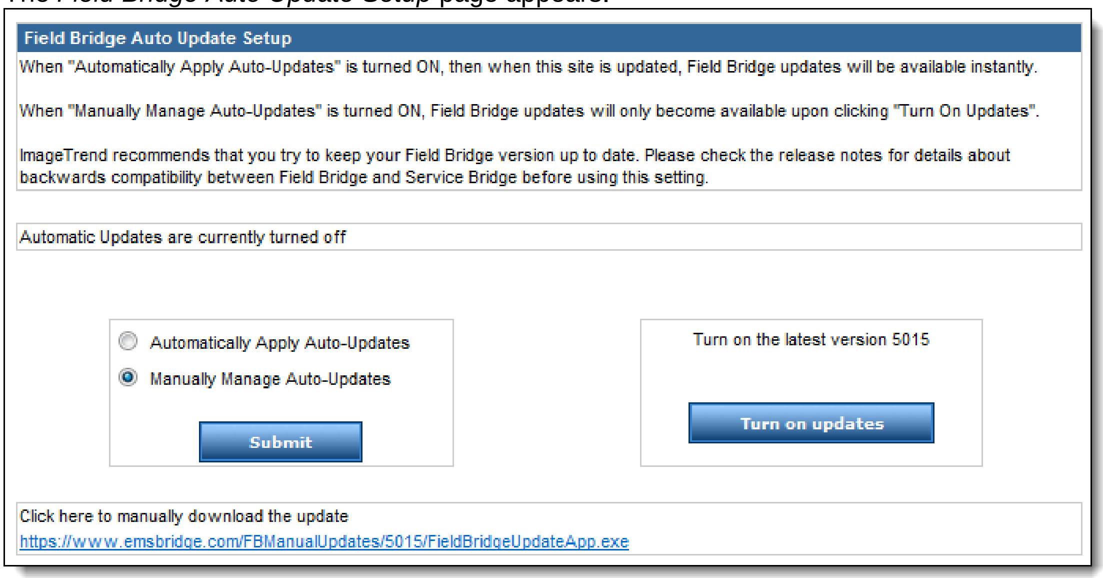
4. To make updates automatically available, select *Automatically Apply Auto-Updates.*
   OR
   To manually control when Field Bridge updates are available, select *Manually Manage Auto-Updates.*
   The *Turn off all auto updates* section appears.

5. Click *Submit.*
   The changes are applied.

Manually Applying Field Bridge Updates

If you have chosen to control Field Bridge updates manually, you will need to select when releases should be available.

1. From the upper right, click *Admin.*
2. Under *Site Management,* click *Settings.*
   A sub-menu appears.
3. Under *Settings,* click *Field Bridge Auto Update Setup.*
   The *Field Bridge Auto Update Setup* page appears.



4. To release the update for Field Bridge systems to download, click *Turn on updates.*
   The update is now available for Field Bridge systems to download and install.

CHAPTER 10

SYSTEM NOTIFICATIONS

10.1 Chapter Overview

The State Bridge system provides system administrators with a variety of ways to communicate with other system users. This chapter explains how to set up alerts that will be displayed when users log in or correspondence that can be sent to their inbox within the State Bridge.

10.2 Working with Emergency Alerts

Emergency alerts can appear in the inboxes of all staff members in selected services or in a banner across the top of the page. System administrators can view a list of past alerts or create a new alert.

Viewing and Editing Past Alerts

1. From the upper right, click *Admin.*
2. Under *Product Settings,* click *Correspondence & Alerts.*
   A sub-menu appears.
3. Under *Correspondence & Alerts,* click *Emergency Alerts.*
   The *Emergency Alerts* page appears, displaying a list of all past alerts.

Create New Alert

Title	Last Modified	Last Sent	Services Notified
Test alerts	05/09/05 12:22 PM	04/07/05 01:51 PM	3
Emergency Test Only	04/07/05 08:45 AM	04/07/05 08:44 AM	3
Explosion at Metrodome	02/09/05 03:12 PM	02/09/05 03:12 PM	1
Major Accident	07/22/04 02:42 PM	07/22/04 02:42 PM	1
18 Overdose Deaths In Four Days.	06/24/04 03:10 PM	06/24/04 02:26 PM	1

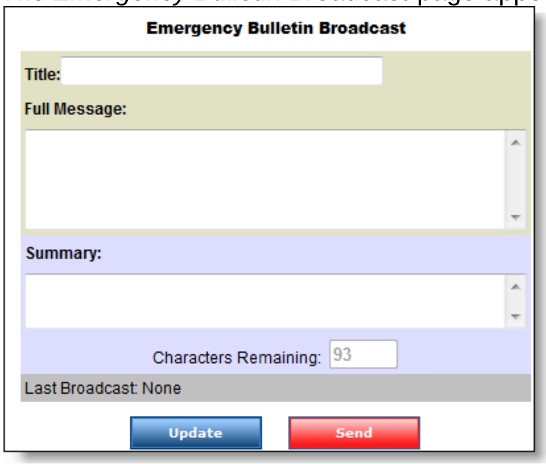
4. To view additional alert information or to edit the alert, click the alert title.
5. To edit the alert,
   a. Use the provided text boxes to make any desired changes.
   b. To change only the banner that appears when users log in, click *Update.*
      To change send a new alert to users' inboxes, click *Send.*

Creating New Alerts

Alerts allow system administrators to create one message that will appear in the emergency alert banner at the top of the page and a more complete message that will appear in messages that are sent out and when users click the alert banner.

1. From the upper right, click *Admin.*
2. Under *Product Settings,* click *Correspondence & Alerts.*
   A sub-menu appears.
3. Under *Correspondence & Alerts,* click *Emergency Alerts.*

4. Click *Create New Alert.*
   The *Emergency Bulletin Broadcast* page appears.



5. In the *Title* text box, type a name for the alert.
6. In the *Full Message* text box, type all information that should appear in the message or in the full alert when it is opened from the banner.
7. In the *Summary* text box, type a short message to appear in the banner.
8. When finished, to send the message to users' inboxes, click *Send.*
   To create a banner, click *Update.*

10.3 Working with Correspondence

System administrators can send messages to staff members that will be emailed to any system users who have an email addresses listed in their profile. These messages must be based off templates, which can also be created by the system administrator, and can contain merge fields to automatically personalize messages to different staff members. Before any correspondence can be sent, system administrators must create correspondence templates.

Working with Templates

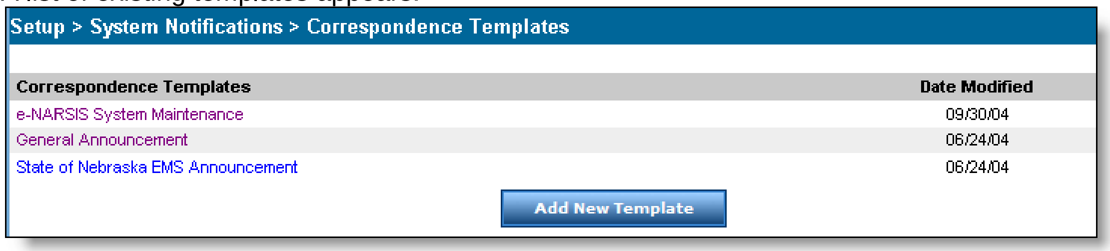
Templates provide a base document off of which system administrators can build individual pieces of correspondence. Templates can provide a standard title, content or layout for correspondence, allowing administrators to efficiently send out commonly communications. The information from this template can be edited when an individual piece of correspondence is built from it.

Viewing and Editing Templates

System administrators can work with existing correspondence templates.

1. From the upper right, click *Admin.*
2. Under *Product Settings,* click *Correspondence & Alerts.*
   A sub-menu appears.
3. Under *Correspondence & Alerts,* click *Correspondence Templates.*

A list of existing templates appears.



4. To view or edit an existing template, click the template's name.
5. In the provided fields, make any desired changes.
6. When finished, click *Save.*

Adding New Templates

In addition to creating templates with content for messages that may be frequently sent out, system administrators may want to create a template with no body text that can be used for unusual pieces of correspondence.

1. From the upper right, click *Admin.*
2. Under *Product Settings,* click *Correspondence & Alerts.*
   A sub-menu appears.
3. Under *Correspondence & Alerts,* click *Correspondence Templates.*
4. Click *Add New Template.*
5. In the *Name of Template* text box, type a title for the template.
6. In the body of the message, type and format any information to be included in the template.
7. To add the template to the system, click *Save.*
   The new template appears in the list of correspondence templates.

Working with Merge Fields

Merge fields allow the system to automatically customize correspondence for each recipient when mass correspondence is sent. These fields insert a placeholder into the correspondence, which is replaced with each recipient's specific information when the correspondence is sent. System administrators can view the merge fields that are currently set up and view the information to insert them into templates. Users must be extremely familiar with the database being used to store system information in order to create new merge fields. If unfamiliar with the database, please contact ImageTrend for assistance finding the correct values and terms to create a merge field.

To use a merge field in a template, type the text in the *Merge Name* field into the template at the desired position, including the brackets.

To view information about current merge fields:

1. From the upper right, click *Admin.*
2. Under *Product Settings,* click *Correspondence & Alerts.*
   A sub-menu appears.
3. Under *Correspondence & Alerts,* click *Correspondence Merge Fields.*

A list of current merge fields appears.

Merge Fields

[Add New]

Field Name	Merge Name	Result	Group
• Today	[[Today Date]]	CUSTOM TAG	Other
• PE_City	[[City]]	PE_City	Performers
• PE_FirstName	[[First Name]]	PE_FirstName	Performers
• PE_LastName	[[Last Name]]	PE_LastName	Performers
• PE_PostalCode	[[Zip]]	PE_PostalCode	Performers
• PE_StateOrProvince	[[State]]	PE_StateOrProvince	Performers
• PE_WorkPhone	[[Phone]]	PE_WorkPhone	Performers

[Add New]

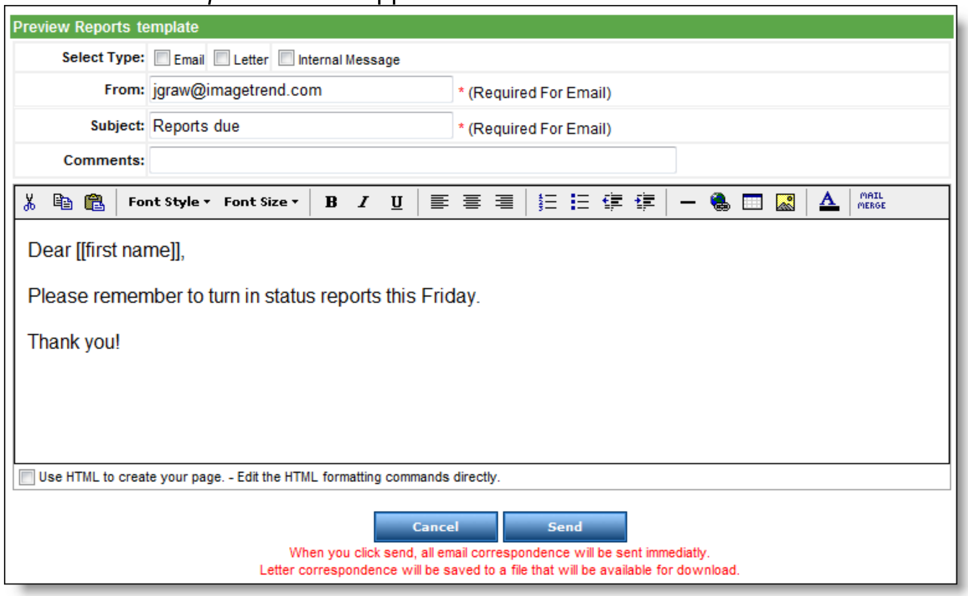
4. To view additional information about a merge field, click the field name.

Creating New Correspondence

Once templates have been created, system administrators can create and send correspondence based on those templates.

1. From the upper right, click *Admin.*
2. Under *Product Settings,* click *Correspondence & Alerts.*
   A sub-menu appears.
3. Under *Correspondence & Alerts,* click *Correspondence.*
4. From the *Select a Correspondence Template to work with* drop down menu, select the template off of which this piece of correspondence should be based.
5. Click *Continue.*
6. To select the staff members to send the correspondence to,
   a. From the *Region* drop down menu, select the region containing the correct users.
   b. From the *Service* drop down menu, select the service containing the correct users.
   c. From the *User* scroll list, select all users to receive the correspondence.
      HINT: To select more than one user, press and hold *Ctrl* while clicking each name. To select a range of users, press and hold *Shift* while clicking the first and last name in the range.
      NOTE: Only users who have email addresses listed in the system will display in the *User* list.
   d. Click *Add to List.*

e. When all desired users are added to the *Selected User* list, click *Continue.* The *Preview Template* screen appears.



7. In the *Select Type* section, select whether this correspondence should be sent in an email message, saved to be sent as a paper letter or sent to the user's inbox within State Bridge.
8. In the *From* text box, type the email address that should be seen as the sender and should receive replies to email correspondence.
9. In the *Subject* text box, type a subject line for the message.
10. In the *Comments* text box, type any additional comments about the message.
11. In the body of the message, make any changes to the text.
12. When finished, to send the messages to all recipients or to save files for paper letters, click *Send.*

CHAPTER 11

SYSTEM REPORTS

11.1 Chapter Overview

System administrators can access reports summarizing the performance of the State Bridge system and its users. This chapter explains which reports are available and how to view them.

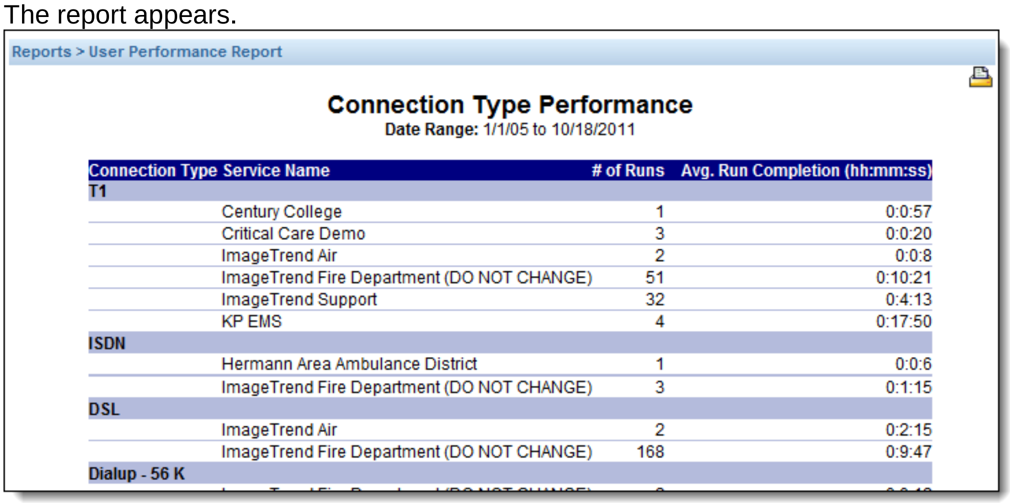
11.2 System Reports

System administrators can access reports summarizing the performance of the State Bridge system and its users. These reports are available from several different sections in the *Admin* tab.

User Performance Report

The *User Performance* report displays the connection type, number of runs and average time to submit a run form for each service.

1. From the upper right, click *Admin.*
2. Under *Site Management,* click *Users & Security.*
   A sub-menu appears.
3. Under *Users & Security,* click *User Performance Report.*
   The report appears.



Reports > User Performance Report

Connection Type Performance

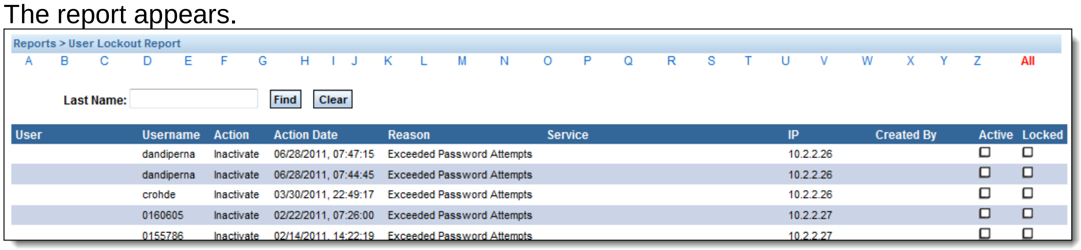
Date Range: 1/1/05 to 10/18/2011

Connection Type	Service Name	# of Runs	Avg. Run Completion (hh:mm:ss)
T1			
	Century College	1	0:0:57
	Critical Care Demo	3	0:0:20
	ImageTrend Air	2	0:0:8
	ImageTrend Fire Department (DO NOT CHANGE)	51	0:10:21
	ImageTrend Support	32	0:4:13
	KP EMS	4	0:17:50
ISDN			
	Hermann Area Ambulance District	1	0:0:6
	ImageTrend Fire Department (DO NOT CHANGE)	3	0:1:15
DSL			
	ImageTrend Air	2	0:2:15
	ImageTrend Fire Department (DO NOT CHANGE)	168	0:9:47
Dialup - 56 K			

User Lockout Report

The *User Lockout* report displays a list of users who have attempted to log in to the State Bridge and been locked out, along with those users' username and service, the data of the lockout and the IP address the attempt to log in came from.

1. From the upper right, click *Admin.*
2. Under *Site Management,* click *Users & Security.*
   A sub-menu appears.
3. Under *Users & Security,* click *User Lockout Report.*
   The report appears.



Reports > User Lockout Report

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 All

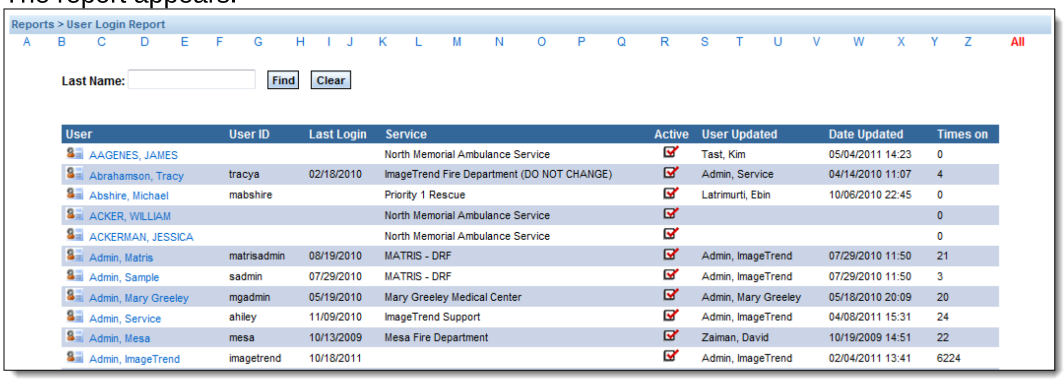
Last Name: Find Clear

User	Username	Action	Action Date	Reason	Service	IP	Created By	Active	Locked
	dandiperna	Inactivate	06/28/2011, 07:47:15	Exceeded Password Attempts		10.2.2.26		☐	☐
	dandiperna	Inactivate	06/28/2011, 07:44:45	Exceeded Password Attempts		10.2.2.26		☐	☐
	crohde	Inactivate	03/30/2011, 22:49:17	Exceeded Password Attempts		10.2.2.26		☐	☐
	0160605	Inactivate	02/22/2011, 07:26:00	Exceeded Password Attempts		10.2.2.27		☐	☐
	0155786	Inactivate	02/14/2011, 14:22:19	Exceeded Password Attempts		10.2.2.27		☐	☐

User Login Report

The *User Login* report displays a list of users who have logged in to the State Bridge, their user ID, service, the date of their last login and the number of times they have logged in to the system.

1. From the upper right, click *Admin.*
2. Under *Site Management,* click *Users & Security.*
   A sub-menu appears.
3. Under *Users & Security,* click *User Login Report.*
   The report appears.



Reports > User Login Report

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 All

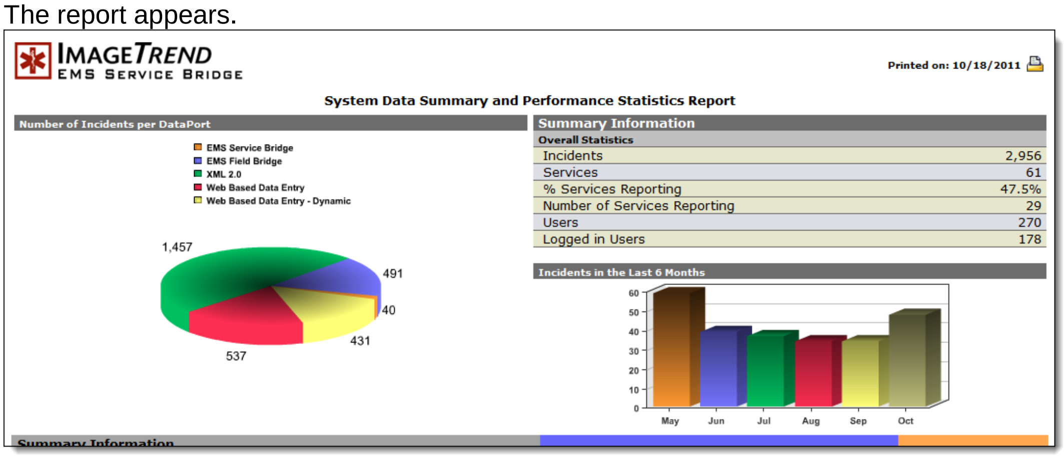
Last Name: Find Clear

User	User ID	Last Login	Service	Active	User Updated	Date Updated	Times on
AAGENES, JAMES			North Memorial Ambulance Service		Tast, Kim	05/04/2011 14:23	0
Abrahamson, Tracy	tracya	02/18/2010	ImageTrend Fire Department (DO NOT CHANGE)		Admin, Service	04/14/2010 11:07	4
Abshire, Michael	mabshire		Priority 1 Rescue		Latrimurti, Ebin	10/06/2010 22:45	0
ACKER, WILLIAM			North Memorial Ambulance Service				0
ACKERMAN, JESSICA			North Memorial Ambulance Service				0
Admin, Matris	matrisadmin	08/19/2010	MATRIS - DRF		Admin, ImageTrend	07/29/2010 11:50	21
Admin, Sample	sadmin	07/29/2010	MATRIS - DRF		Admin, ImageTrend	07/29/2010 11:50	3
Admin, Mary Greeley	mgadmin	05/19/2010	Mary Greeley Medical Center		Admin, Mary Greeley	05/18/2010 20:09	20
Admin, Service	ahiley	11/09/2010	ImageTrend Support		Admin, ImageTrend	04/08/2011 15:31	24
Admin, Mesa	mesa	10/13/2009	Mesa Fire Department		Zaiman, David	10/19/2009 14:51	22
Admin, ImageTrend	imagetrend	10/18/2011			Admin, ImageTrend	02/04/2011 13:41	6224

System Report

The *System* report displays a summary of the information imported into the system, the methods used to import the information, and the users and services adding information (including run form submissions).

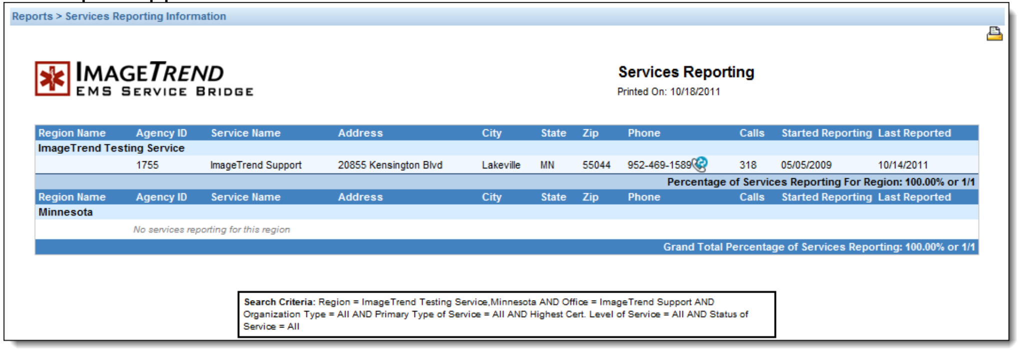
1. From the upper right, click *Admin.*
2. Under *Administration Reports,* click *Incident Reports.*
   A sub-menu appears.
3. Under *Incident Reports,* click *System Report.*
   The report appears.



Services Reporting Report

The *Services Reporting* report displays a list of services and their basic contact information based on criteria set by the system administrator, including region, organization type, primary type of service, and status (i.e., reporting or not reporting runs) or service.

1. From the upper right, click *Admin.*
2. Under *Administration Reports,* click *Incident Reports.*
   A sub-menu appears.
3. Under *Incident Reports,* click *Services Reporting* or *Services Reporting Fire,* as appropriate.
   The *Services Reporting Information* page appears.
4. Use the fields to enter any specific criteria to locate specific service information.
5. Click *Continue.*
   The report appears.



Reports > Services Reporting Information

IMAGETREND EMS SERVICE BRIDGE

Services Reporting
Printed On: 10/18/2011

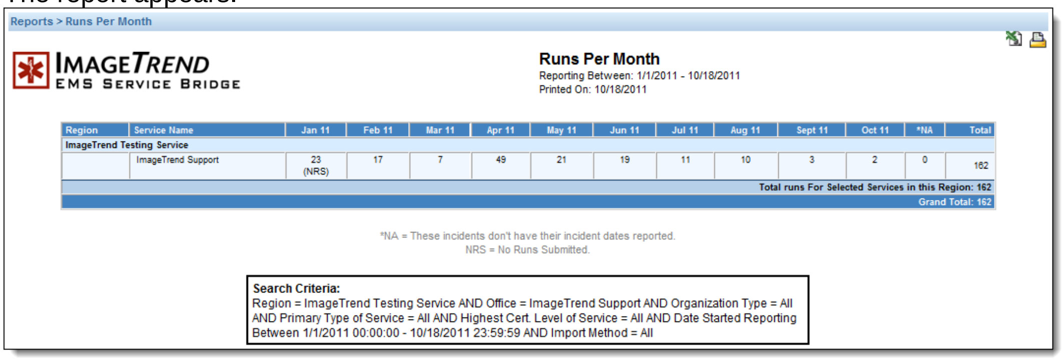
Region Name	Agency ID	Service Name	Address	City	State	Zip	Phone	Calls	Started Reporting	Last Reported
ImageTrend Testing Service										
	1755	ImageTrend Support	20855 Kensington Blvd	Lakeville	MN	55044	952-469-1589	318	05/05/2009	10/14/2011
Percentage of Services Reporting For Region: 100.00% or 1/1										
Region Name	Agency ID	Service Name	Address	City	State	Zip	Phone	Calls	Started Reporting	Last Reported
Minnesota										
	No services reporting for this region									
Grand Total Percentage of Services Reporting: 100.00% or 1/1										

Search Criteria: Region = ImageTrend Testing Service,Minnesota AND Office = ImageTrend Support AND Organization Type = All AND Primary Type of Service = All AND Highest Cert. Level of Service = All AND Status of Service = All

Runs Per Month Report

The *Runs Per Month* report displays information about run reports submitted in each month of the year. Run reports can be filtered by region, service or import method (i.e., Field Bridge, State Bridge, XML import or Access import).

1. From the upper right, click *Admin.*
2. Under *Administration Reports,* click *Incident Reports.*
   A sub-menu appears.
3. Under *Incident Reports,* click *Runs Per Month.*
   The *Runs Per Month* criteria page appears.
4. Use the fields to enter any specific criteria to locate specific run information.
5. Click *Continue.*
   The report appears.



Reports > Runs Per Month

IMAGETREND EMS SERVICE BRIDGE

Runs Per Month
Reporting Between: 1/1/2011 - 10/18/2011
Printed On: 10/18/2011

Region	Service Name	Jan 11	Feb 11	Mar 11	Apr 11	May 11	Jun 11	Jul 11	Aug 11	Sept 11	Oct 11	*NA	Total
ImageTrend Testing Service													
	ImageTrend Support	23 (NRS)	17	7	49	21	19	11	10	3	2	0	162
Total runs For Selected Services in this Region: 162													
Grand Total: 162													

*NA = These incidents don't have their incident dates reported.
NRS = No Runs Submitted.

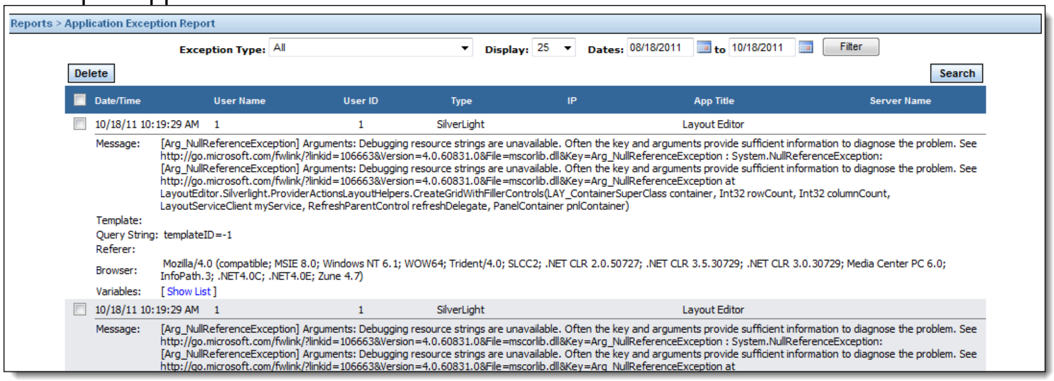
Search Criteria:
Region = ImageTrend Testing Service AND Office = ImageTrend Support AND Organization Type = All AND Primary Type of Service = All AND Highest Cert. Level of Service = All AND Date Started Reporting Between 1/1/2011 00:00:00 - 10/18/2011 23:59:59 AND Import Method = All

Application Exception Report

The *Application Exception* report displays a list of all errors within the system and their details (including who received the error and when).

1. From the upper right, click *Admin.*
2. Under *Administration Reports,* click *Errors.*
   A sub-menu appears.

3. Under *Errors,* click *Application Exceptions.*
   The report appears.

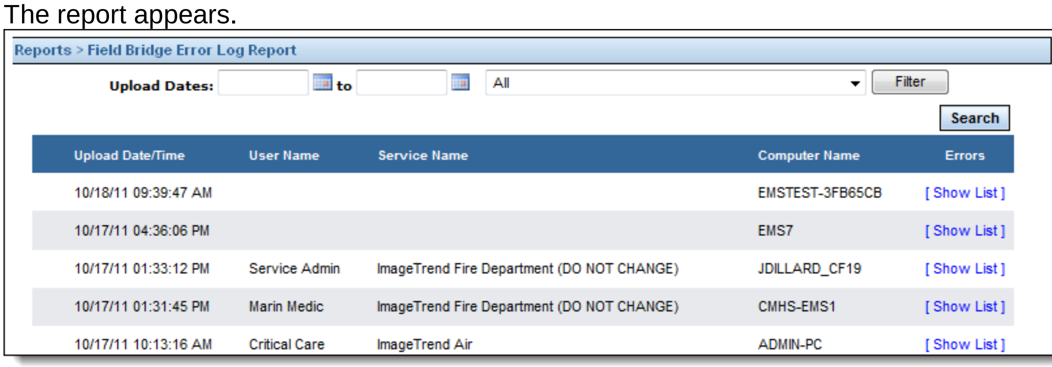


4. If necessary, to find a specific issue, use the filters at the top of the page to select criteria to narrow down the results.
5. Click *Filter.*
   The page is refreshed to display only results that fit your criteria.

Field Bridge Error Log Report

The *Field Bridge Error Log* report displays a list of all Field Bridge error logs that have been submitted.

1. From the upper right, click *Admin.*
2. Under *Administration Reports,* click *Errors.*
   A sub-menu appears.
3. Under *Errors,* click *Field Bridge Exceptions.*
   The report appears.



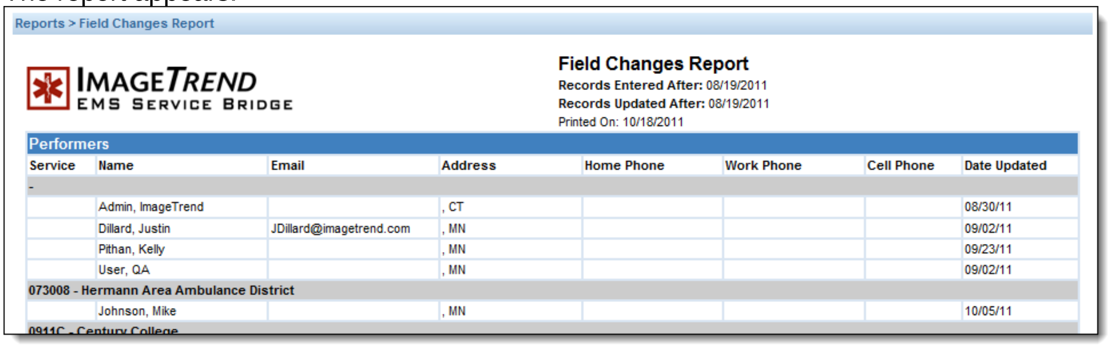
4. If necessary, to find a specific issue, use the filters at the top of the page to select criteria to narrow down the results.
5. Click *Filter.*
   The page is refreshed to display only results that fit your criteria.
6. To view all the results in a specific error log, click associated the *Show List* link.

Field Changes Report

The *Field Changes* report displays a list of all fields that have been changed.

1. From the upper right, click *Admin.*
2. Under *Site Management,* click *Site Resources.*
   A sub-menu appears.
3. Under *Site Resources,* click *Field Changes Report.*
   The *Field Changes Report* criteria page appears.

4. Use the fields to enter any specific criteria to locate specific field information.
5. Click *Continue.*
   The report appears.



Reports > Field Changes Report

IMAGETREND EMS SERVICE BRIDGE

Field Changes Report
Records Entered After: 08/19/2011
Records Updated After: 08/19/2011
Printed On: 10/18/2011

Performers

Service	Name	Email	Address	Home Phone	Work Phone	Cell Phone	Date Updated
-							
	Admin, ImageTrend		, CT				08/30/11
	Dillard, Justin	JDillard@imagetrend.com	, MN				09/02/11
	Pithan, Kelly		, MN				09/23/11
	User, QA		, MN				09/02/11
073008 - Hermann Area Ambulance District							
	Johnson, Mike		, MN				10/05/11
0911C - Century College							

Printing System Reports

1. Open the report as detailed in the section for that report.
2. Click the *Print Report* icon .
3. In the *Print* dialog box, select any custom options and click *Print.*

CHAPTER 12

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 State Bridge effectively, please consult ImageTrend in any of the following ways:

- Phone (952) 469.1589
- 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