HARDTEK
AUDITING SOLUTIONS

FACILITY MANAGEMENT SOFTWARE

USER'S MANUAL

Version 1.0

By
Lisa Hardesty, President and CEO, Healthcare Support Services,

Certified Healthcare Compliance Consultant and Healthcare Environmental Manager

TABLE OF CONTENTS


: help
: home
: logout
: contact
Facility Management Software User's Manual
facility management
audit management
user management
admin tools
reports


: help
: home
: logout
: contact
facility management
audit management
user management
admin tools
reports

TECHNICAL INFORMATION

SYSTEM REQUIREMENTS, SOFTWARE, PLATFORM

Desktop browser:

Internet Explorer 6.0 or higher

Desktop synchronization:
HTTP access to a web server
.NET Compact Framework
SQL Server CE
Microsoft ActiveSync 3.7 or higher
Pocket Audit application

Handheld PDA:
Microsoft RepliSync, to be provided by Hardtek
Pocket PC with Microsoft OS

Camera, if not integrated into the PDA, must be able to save images in .jpg or .gif file format

SUPPORT

A User Implementation Program is available. Contact HARDTEK for information.

Online support is available by email. Contact info@hardtekauditingsolutions.com and a representative will respond.

Other contact information:
Healthcare Support Services
Vicksburg, MI 49097
Phone: 269-649-1623, Fax: 269-349-4076

PRINTING THIS USER'S MANUAL

Select Landscape orientation.

LICENSING AGREEMENT

The Facility Management Software program is licensed for use by a single organization and may not be used for processing of third party data. User agrees:

- (a) Not to remove any Healthcare Support Services notices in the software.
- (b) Not to sell, transfer, rent, lease, or sub-license the software or documentation to any third party.
- (c) Not to alter or modify the software.
- (d) Not to reverse engineer, disassemble, decompile, or attempt to derive source code from the software or prepare derivative works from it.

Healthcare Support Services and its suppliers own the software, including, without limitation, any and all worldwide copyrights, patents, trade secrets, trademarks, and proprietary and confidential information rights on or associated with the software. The software is protected by copyright laws and international copyright treaties, as well as other intellectual property laws and treaties. No ownership rights in the software are transferred to the user.

Licensor reserves all rights with respect to the Licensed Products and Hardware under all applicable laws for the protection of proprietary information, including trade secrets, copyrights, trademarks, and patents.

Licensee shall not cause or permit unauthorized copying, reproduction, or disclosure of any portion of the Licensed Products, or any instructions, manuals, or other documentation, or the delivery or distribution of any part thereof to any third person or entity, for any purpose whatsoever, without the prior written permission of Licensor. This restriction shall continue to bind Licensee and its agents and representatives beyond the termination of this agreement.

OVERVIEW

The Hardtek Auditing Solutions Facility Management Software Program system is designed to automate facility inspection results, allowing for faster reporting and correction of issues, thus helping facilities be proactive in monitoring, reporting, and correcting issues and promoting safety and regulatory compliance within any healthcare setting or production plant facility. The Facility Management Software is used with a laptop or desktop computer with an Internet browser and handheld personal digital assistant (PDA).

System setup consists of populating fields under the Facility Management, Audit Management, and User Management tabs, and is accomplished by selecting from drop-down menus or creating custom lists. This task can be done by a facility administrator, with the optional assistance of a Healthcare Support Services representative.

Facility Management setup consists of choosing the facility locations to be audited, and can be as detailed as desired, to include the following: system, facility, building, floor, department, area, and work station.

Audit Management setup consists of programming the audits by selecting from a drop-down menu or by creating a custom list. Audit elements are then linked to the standards that support them.

User Management setup consists of adding or editing users and assigning one of four levels of permission.

Once setup is complete, an auditor can perform inspections, using a handheld PDA to record any deficiencies found; deficiencies are linked to a department or facility area and the standards or elements of compliance. The PDA's digital camera feature allows the auditor to photograph deficiencies onsite.

Following the audit, the auditor emails the audit findings with photo attachments to the unit managers, directors, and other parties responsible for resolving the issues found. The email serves as a work order for correcting issues.

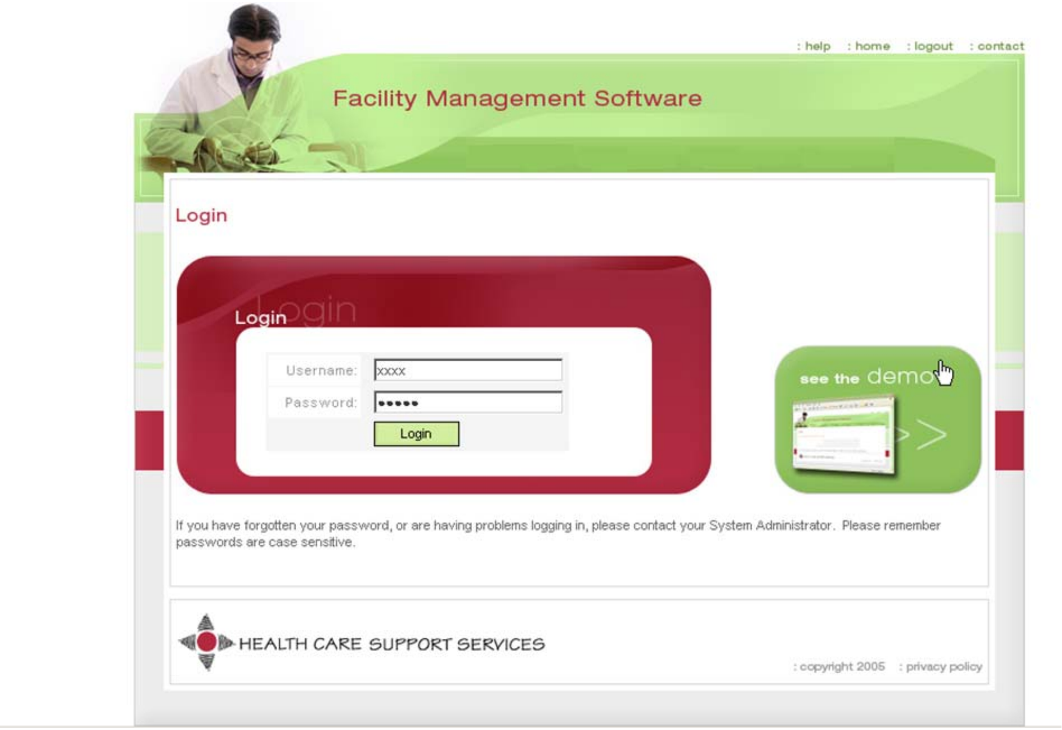
The Facility Management Software's powerful Reports function lets any user generate ten static reports and any number of ad hoc reports to trend deficiencies within the facility.

PREVIEWING THE SOFTWARE ON THE WEB

To access the website, go to: http://www.hardtekauditingsolutions.com/Login.aspx.
From the first screen, the user may view a Demo of the Facility Management Software Program without logging in.

THE LOGIN SCREEN MENU

Navigate to the **help** page or the **contact** page by selecting the appropriate choice from the menu at the top of the **Login** screen; other options include viewing the **Demo** or logging in.



If you have forgotten your password, or are having problems logging in, please contact your System Administrator. Please remember passwords are case sensitive.

Demo

The Demo provides an automated tour of the software and the key tasks that can be performed under each menu tab.

During the Demo, use the controls in the panel at the bottom of the screen to rewind, go back, play, pause, go forward, exit, or access information. You do not need to log in to play the Demo.

1.

Login

Enter your **User name**.

Enter your **Password.**

Note: Username and password are restricted to 20 characters each and are case sensitive. If you have forgotten your password or are having problems logging in, please contact your system administrator.

Click on **Login**.

Username: xxxx

Password: •••••

WELCOME SCREEN

Successful login takes you to the **Welcome** screen, which is used to communicate information regarding upgrades to the program and other important information. This screen also features the License Agreement.

Welcome

Thank you for using Healthcare Support Services Facility Management Software Application.

This page will be used to communicate future system upgrades.

WARNING: This program is protected by copyright law and international treaties. Unauthorized reproduction or distribution of this program, or any portion of it, may result in severe civil and criminal penalties, and will be prosecuted to the maximum extent possible under law.

License Agreement:

From this screen the user can access up to five function tabs, which appear across the green web banner (shown circled in red). The available tabs depend upon the user's permission level. The five function tabs are:

facility management

audit management

user management

admin tools

reports

PERMISSION LEVELS

Program functionality and access are determined by a user’s permission level. A user can view anything at or below his or her permission level. The four permission levels are shown below.

Note: All users may access any of the reports available under the **reports** tab.

Level I User
Permissions related to audit types
User management tasks: edit users

Level II Facility Administrator
Permissions related to a single facility
Audit management tasks
User management tasks: add users

Level III Hospital System Administrator
Permissions related to an entire health system
Facility management tasks

Level IV Consultant
Permissions related to a number of health systems
All program functions

User Titles, Permission Levels, and Associated Tasks

User Title	Permission Level	Associated Tasks				
		Add Users	Edit Users	Audit Management	Facility Management	Reports
User	I		x			x
Facility Administrator	II	x	x	x		x
Hospital System Administrator	III	x	x	x	x	x
Consultant	IV	x	x	x	x	x

THE FIVE FUNCTION TABS

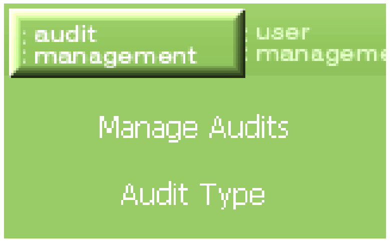
The drop-down choices and tasks related to each function tab are given below.

Facility Management

- Add/Edit Facility—change department names, key contacts, etc.
- Add/Edit Directors—update director contact information
- Add/Edit Supervisors—update supervisor contact information

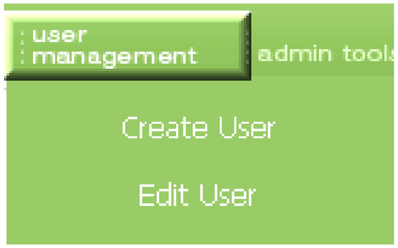
Audit Management

- Manage Audit—edit or email audits performed within a specified date range
- Audit Type—edit an existing audit type or add an audit type



User Management

- Create User—add a new user
- Edit User—revise or update information about a current user

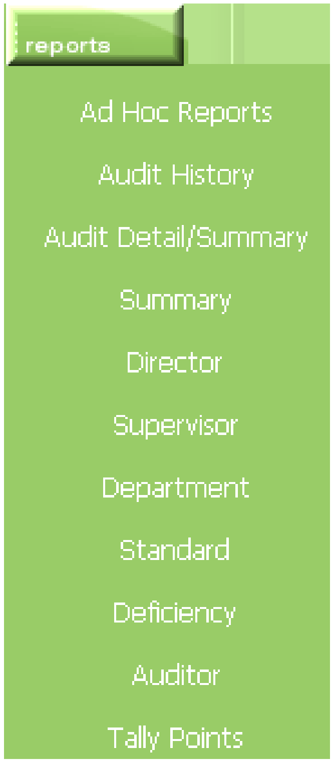


Admin Tools

- The administrative tools tab is functional only for users with Level IV permission and may not appear on your menu bar.

Reports

- Ad Hoc Reports – to generate a unique report using specific variables
- Static Reports (listed by type) – to generate 10 common reports:
    - Audit History
    - Audit Detail/Summary
    - Summary
    - Director
    - Supervisor
    - Department
    - Standard
    - Deficiency
    - Auditor
    - Tally Points



AUDIT SETUP AND REPORTING

FACILITY MANAGEMENT TASKS

Add/Edit Facility

Select **Add/Edit Facility** from the **facility management** tab drop-down menu. A series of screens will open that require information.

When all fields are populated, click on **Save** or **Update** to save changes. Click on **Delete** to delete. The screen will refresh and new fields will display.

When the initial Edit Facility screen appears:

Edit Facility

Select Hospital System: Bronson Methodist Hospital

Select Facility: Bronson Methodist Hospital

Facility Name: Bronson Methodist Hospital

Status: ● Active ○ Inactive

Select a hospital system from the **Select Hospital System** field drop-down menu or enter the name of a system.

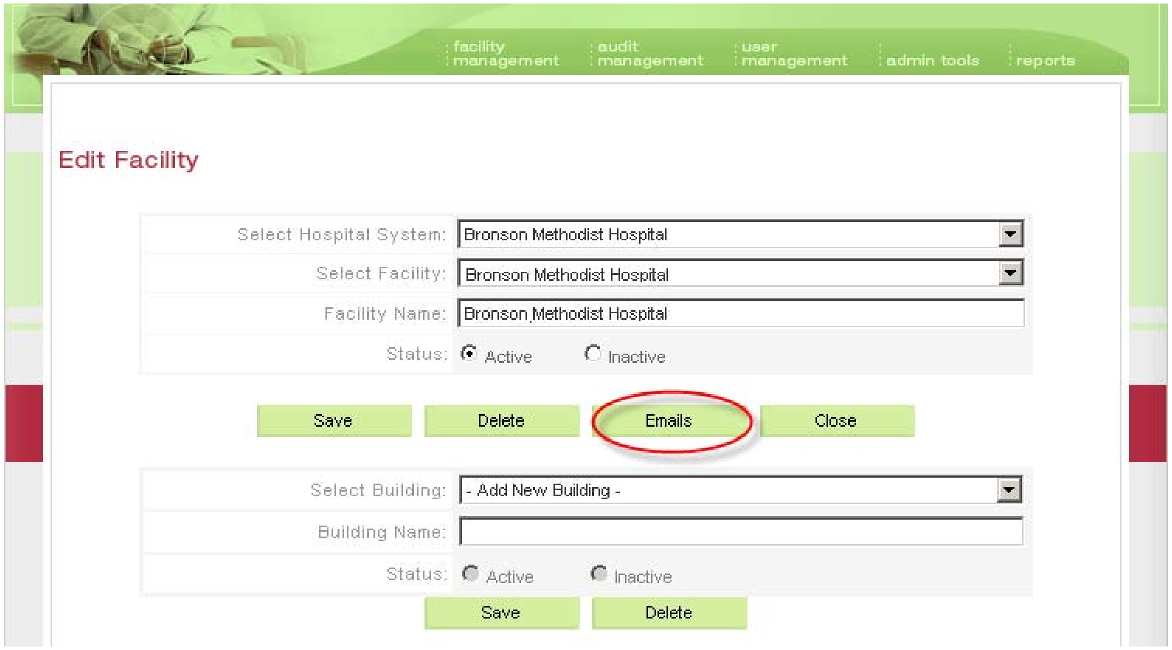
Select a facility from the **Select Facility** field drop-down menu, or enter the name of a facility

Note: **Status** will default to **Active** unless **Inactive** is selected. Selecting **Inactive** will retain the information in the database so it can be later activated. Inactive status will display on the computer, but not on the PDA.

The screen refreshes. The name of the facility appears in the **Facility Name** field. In the example, the system and facility are “Bronson Methodist Hospital”.

Notice that new fields now display.

Click on the **Emails** button (circled in red) to enter email recipients in addition to the customary unit manager, director, and/or supervisor, for those instances when another responsible party needs to be copied on an email.



Edit Facility

Select Hospital System: Bronson Methodist Hospital

Select Facility: Bronson Methodist Hospital

Facility Name: Bronson Methodist Hospital

Status: ● Active ○ Inactive

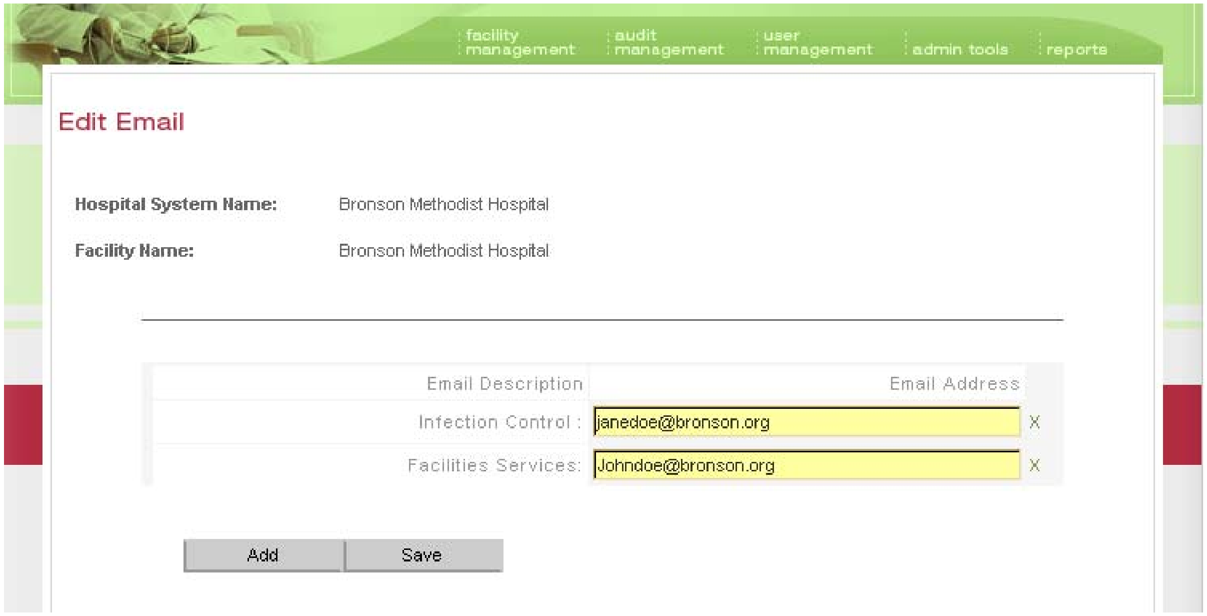
Select Building: - Add New Building -

Building Name:

Status: ○ Active ○ Inactive

The screen refreshes and the **Edit Email** screen opens. Previously entered information will appear in the Email Description and Email Address fields.

Click on **Add** to enter a new contact.



Edit Email

Hospital System Name: Bronson Methodist Hospital

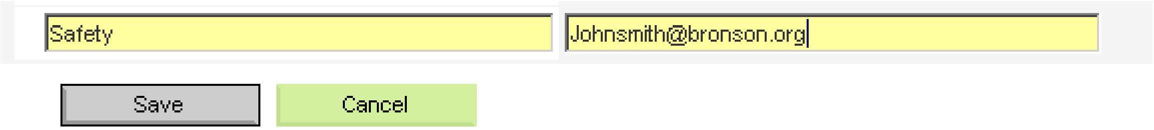
Facility Name: Bronson Methodist Hospital

Email Description	Email Address
Infection Control :	janedoe@bronson.org
Facilities Services:	Johndoe@bronson.org

The screen refreshes and two yellow fields appear.

In the **Email Description** field (left), enter the names of any additional departments of responsibility (in the example, “Safety”) you want to receive emails. Enter the email address in the **Email Address** field (right).

Click on **Save**.



Safety	Johnsmith@bronson.org

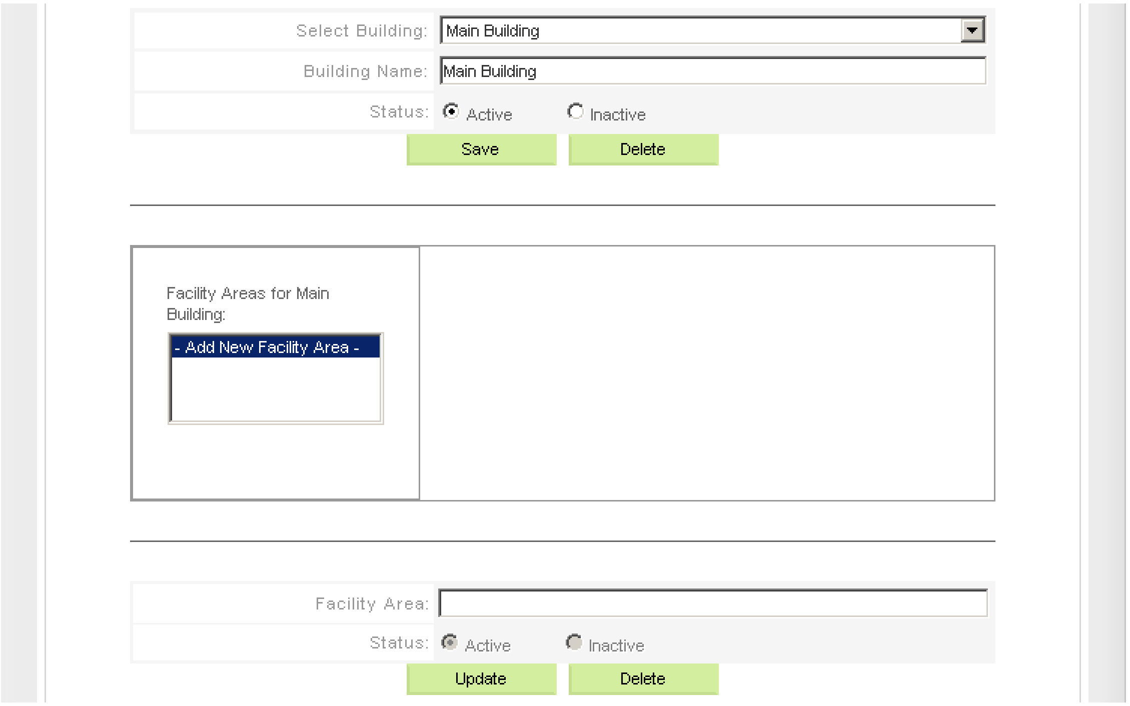
When you are returned to the **Edit Facility** screen:

Select a building from the **Select Building** drop-down menu or type in the name of a new building into the **Building Name** field. (in the example, “Main Building”).

Click on **Save** to add the building to the facility.

The screen will again refresh. A new field opens, **Facility Areas**.

Click on **Add New Facility Area** in the text box.



Select Building: Main Building

Building Name: Main Building

Status: ● Active ○ Inactive

Facility Areas for Main Building:

- Add New Facility Area -

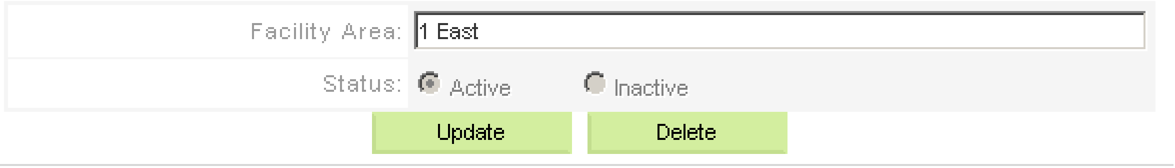
Facility Area:

Status: ● Active ○ Inactive

The screen refreshes. A new field opens, **Facility Area**.

Enter the name of the area into the field. In the example, “1 East” is designated.

Click **Update** to add the area to the facility.

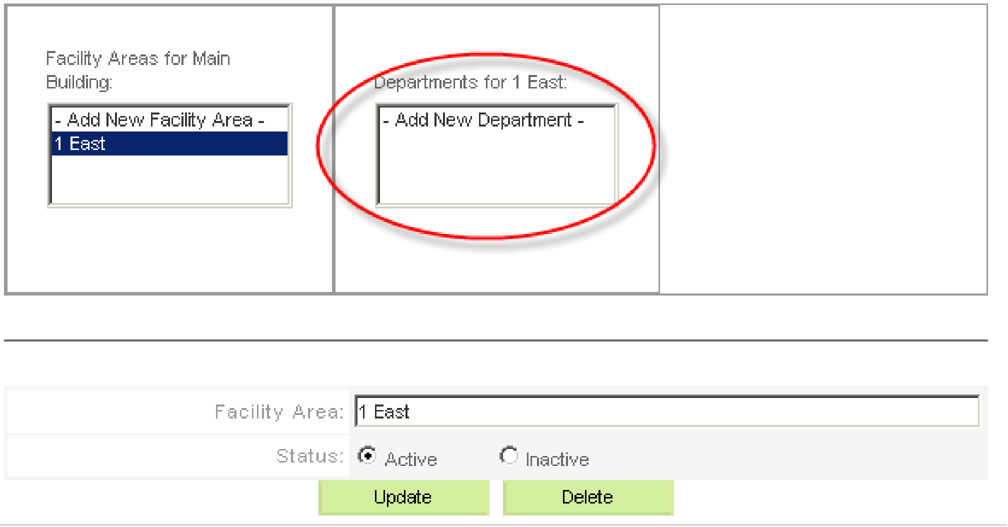


Facility Area: 1 East

Status: ● Active ○ Inactive

The screen refreshes. The name of the facility area you entered will appear in the **Facility Areas** field. A new field, **Departments**, displays next to it.

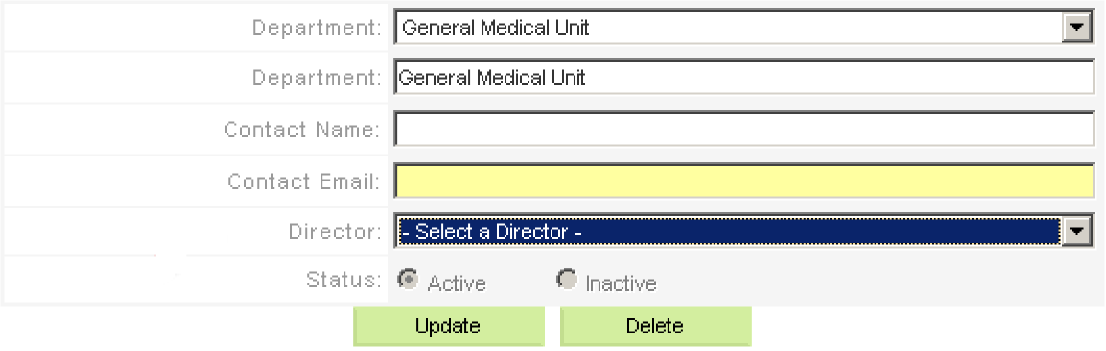
Select a department from the drop-down menu or click on **Add New Department**.



Facility Area: 1 East

Status: ● Active ○ Inactive

The screen refreshes and a set of **Department** fields displays. Scroll down, as necessary, to view them.



Department: General Medical Unit

Department: General Medical Unit

Contact Name:

Contact Email:

Director: - Select a Director -

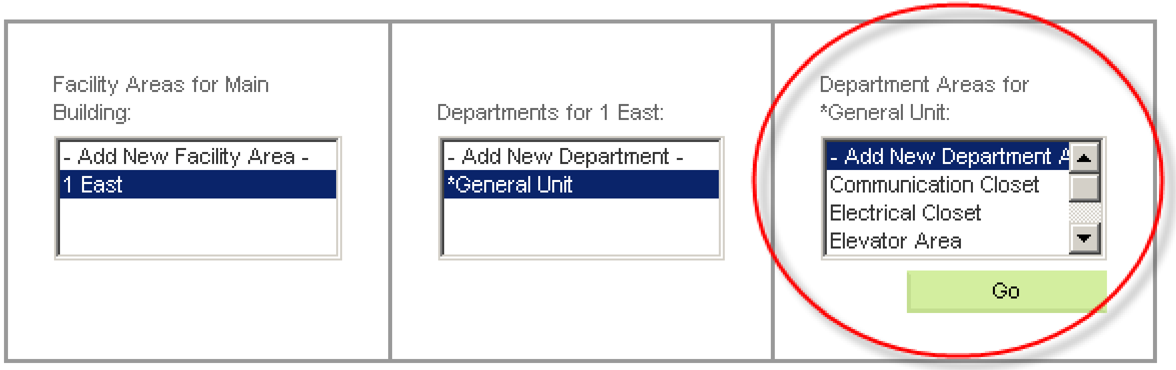
Status: ● Active ○ Inactive

Select a department from the drop-down list or click on **Custom Department** to add the name of a department. In the example, "General Medical Unit" has been designated.

Enter the appropriate information into the **Contact Name** and **Contact Email** fields.

Click on **Select a Director** and select a name to link a director to the department. Click on **Update**.

Note: A new director cannot be added to the database from this screen; new directors are added from the **Add/Edit Directors** screen under the **facility management** tab.



The screen refreshes and a new field will appear, **Department Areas** (in the example, circled).

Select a department area from the drop-down list or click on **Add New Department Area** to add a department area. Click on **Go**.

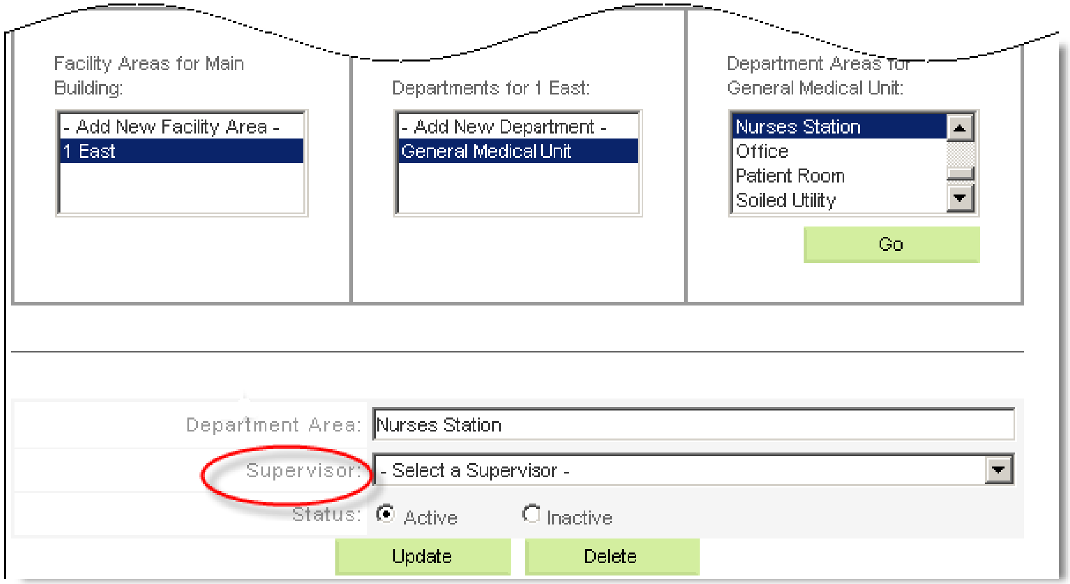
The screen refreshes. The department area appears in the box (in the example, “Nurses Station”) and a new field opens, **Supervisor** (in the example, circled).

Select a supervisor for the department area from the drop-down list.

Note: A new supervisor cannot be added to the database from this screen; new supervisors are added from the **Add/Edit Supervisors** screen under the **facility management** tab.

Status will default to **Active** unless **Inactive** is selected. Select **Inactive** to retain information in the database for later use.

Click on **Update** to save the department area information.



Facility Areas for Main Building:
- Add New Facility Area -
1 East

Departments for 1 East:
- Add New Department -
General Medical Unit

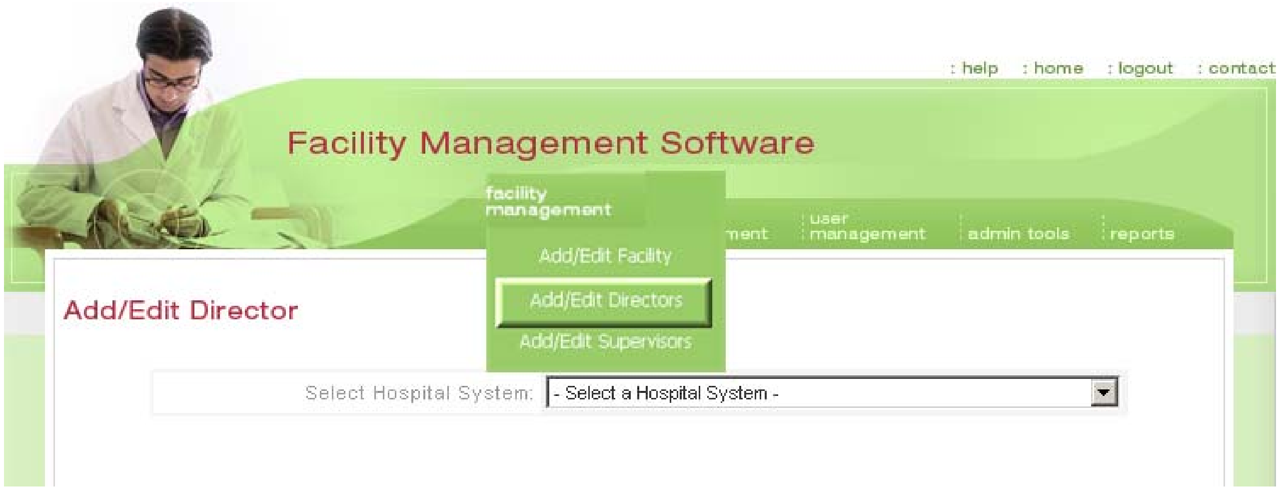
Department Areas for General Medical Unit:
Nurses Station
Office
Patient Room
Soiled Utility

Department Area: Nurses Station
Supervisor: - Select a Supervisor -
Status: ● Active ○ Inactive

Add/Edit Directors

Select **Add/Edit Directors** from the **facility management** tab drop-down menu.

When the **Add/Edit Director** screen appears, select a hospital system from the **Select Hospital System** drop-down menu or enter the name of the hospital system into the field.



Add/Edit Director

Select Hospital System: - Select a Hospital System -

The screen refreshes.

Select a facility from the **Select Facility** drop-down menu.

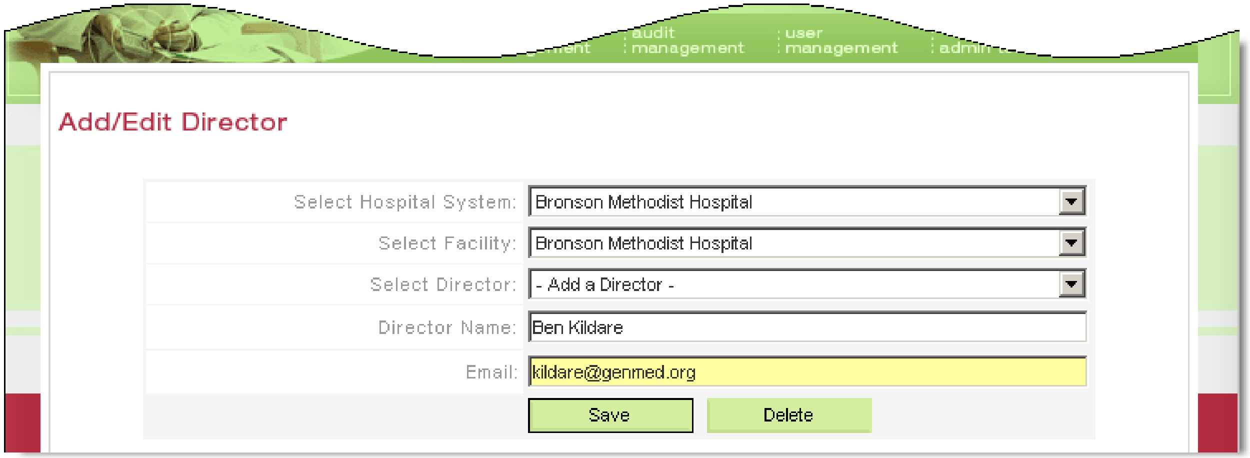
To add a director to the database:

When the screen refreshes, click on **Add a Director** in the **Select Director** field.

Enter the name in the **Director Name** field.

Enter the email address in the **Email** field.

Click on **Save** to save.



Add/Edit Director

Select Hospital System: Bronson Methodist Hospital

Select Facility: Bronson Methodist Hospital

Select Director: - Add a Director -

Director Name: Ben Kildare

Email: kildare@genmed.org

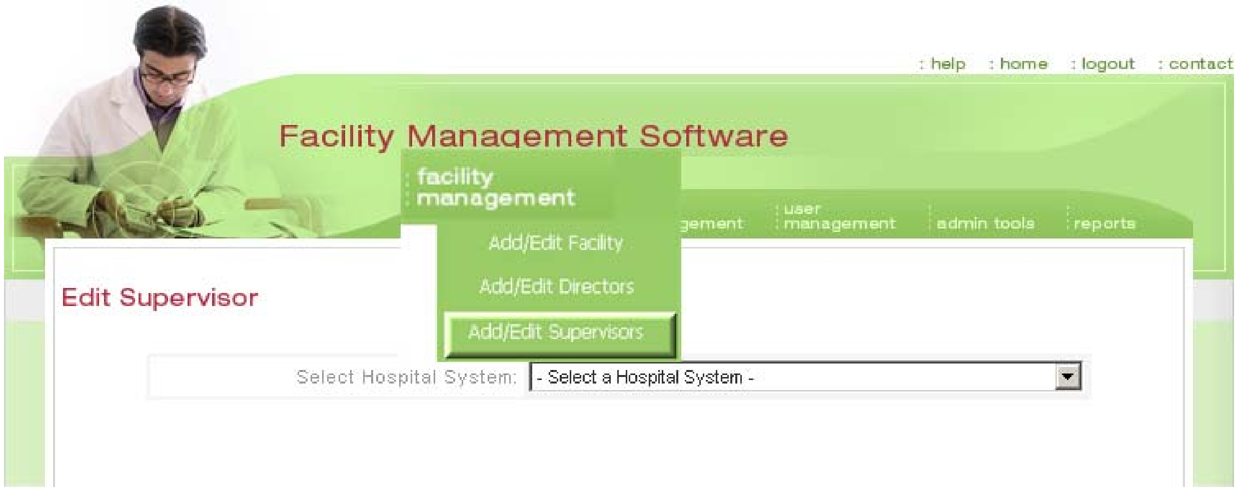
To edit a director whose name already appears in the drop-down menu:

Select the name from the menu. When the screen refreshes, edit the information as necessary. Click on **Save**.

Repeat as necessary to add/edit other directors.

Add/Edit Supervisors

The procedure for adding/editing supervisors is the same as that for adding/editing directors.



Edit Supervisor

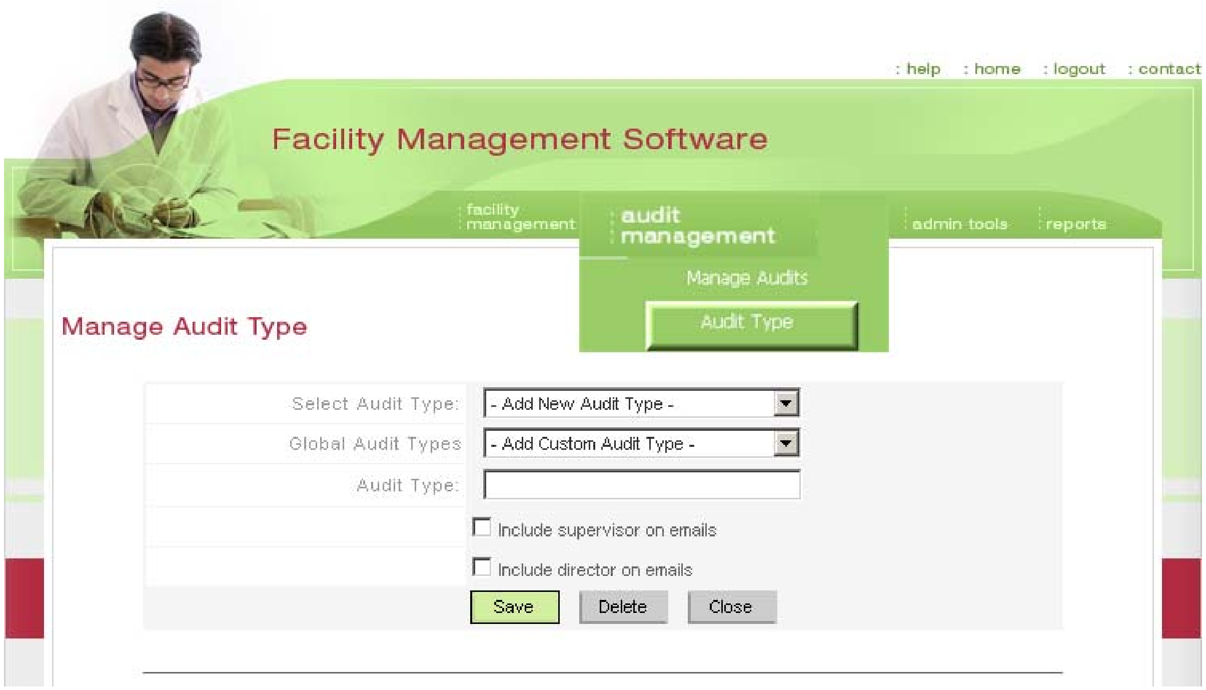
Select Hospital System: - Select a Hospital System -

AUDIT MANAGEMENT TASKS

Audit Type

Select **Audit Type** from the **audit management** tab. The **Manage Audit Type** screen opens.

You can choose an audit type from the **Select Audit Type** field or **Global Audit Types** field drop-down menus, or you can add a new or custom audit type.



Select Audit Type: - Add New Audit Type -

Global Audit Types - Add Custom Audit Type -

Audit Type:

☐ Include supervisor on emails

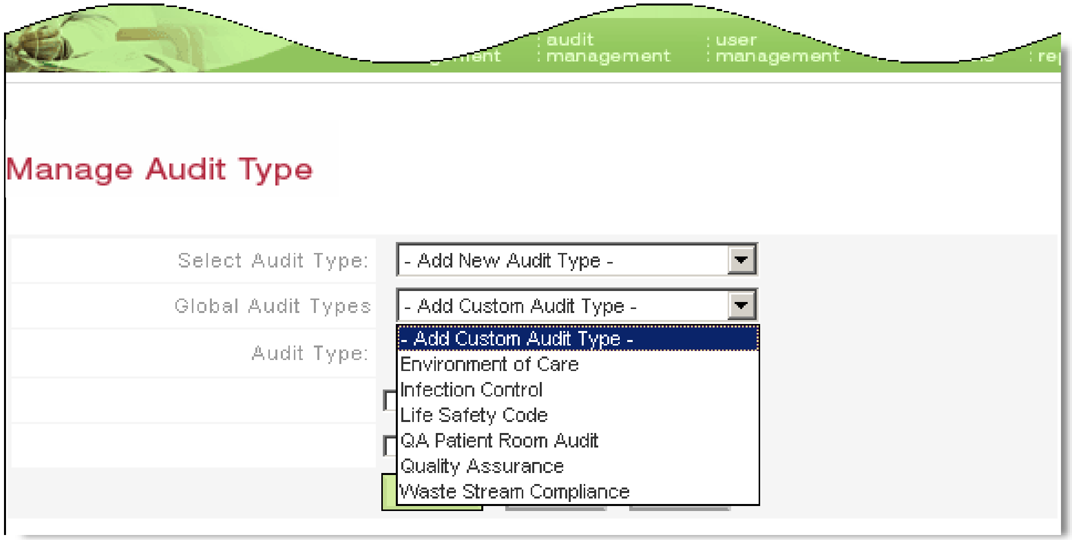
☐ Include director on emails

CHOOSING AN EXISTING AUDIT TYPE FROM THE **GLOBAL AUDIT TYPES** FIELD

Global Audit Types are audits that are available in the system for use.

The options that appear in the **Global Audit Types** drop-down menu will depend upon the user’s permission level.

The example shows several global audit types available.



Manage Audit Type

Select Audit Type: - Add New Audit Type -

Global Audit Types: - Add Custom Audit Type -

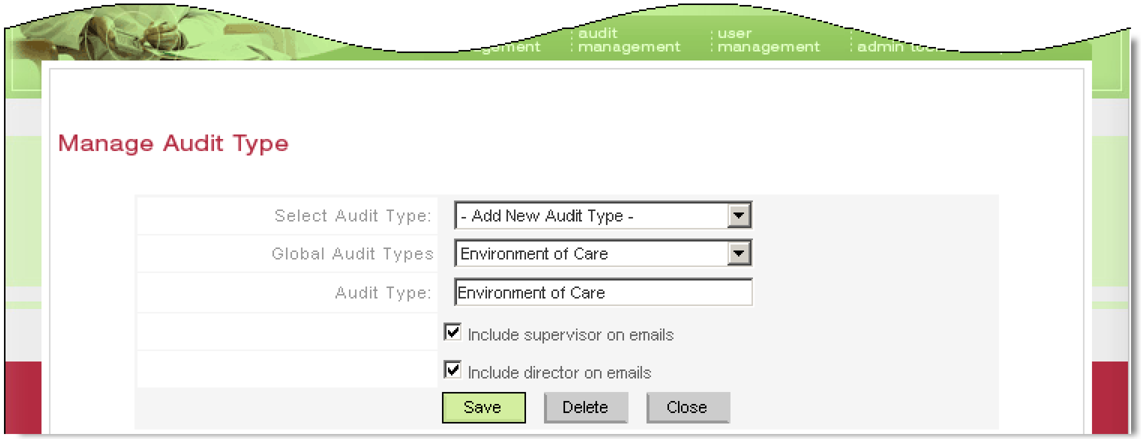
Audit Type:

As an example, select "Environment of Care". The screen refreshes and the selected type of audit appears in the **Global Audit Types** field.

Check boxes display that allow you to **Include supervisor on emails** and/or **Include director on emails**. Select/deselect the boxes as appropriate.

Click on **Save** to save.

A message will appear at the top of the screen to confirm that the audit type has been saved.



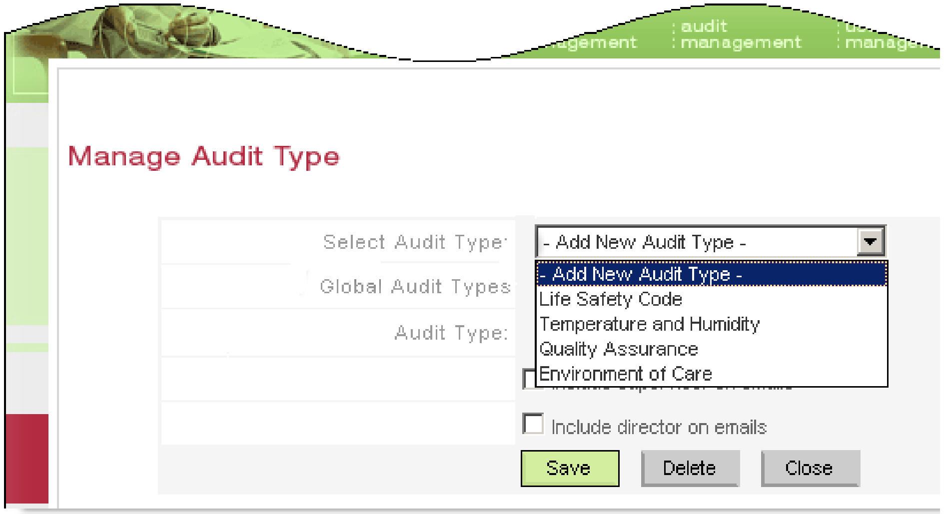
Manage Audit Type

Select Audit Type: - Add New Audit Type -
Global Audit Types Environment of Care
Audit Type: Environment of Care
☑ Include supervisor on emails
☑ Include director on emails

ADDING/EDITING AN AUDIT TYPE FROM THE **SELECT AUDIT TYPE** FIELD

To *add* a new audit type from the **Manage Audit Type** screen, select **Add New Audit Type** from the **Select Audit Type** drop-down menu.

To *edit* an existing audit type, select the audit type from the **Select Audit Type** drop-down menu.



Manage Audit Type

Select Audit Type: - Add New Audit Type -

In the example, “Environment of Care” is the selected audit type.

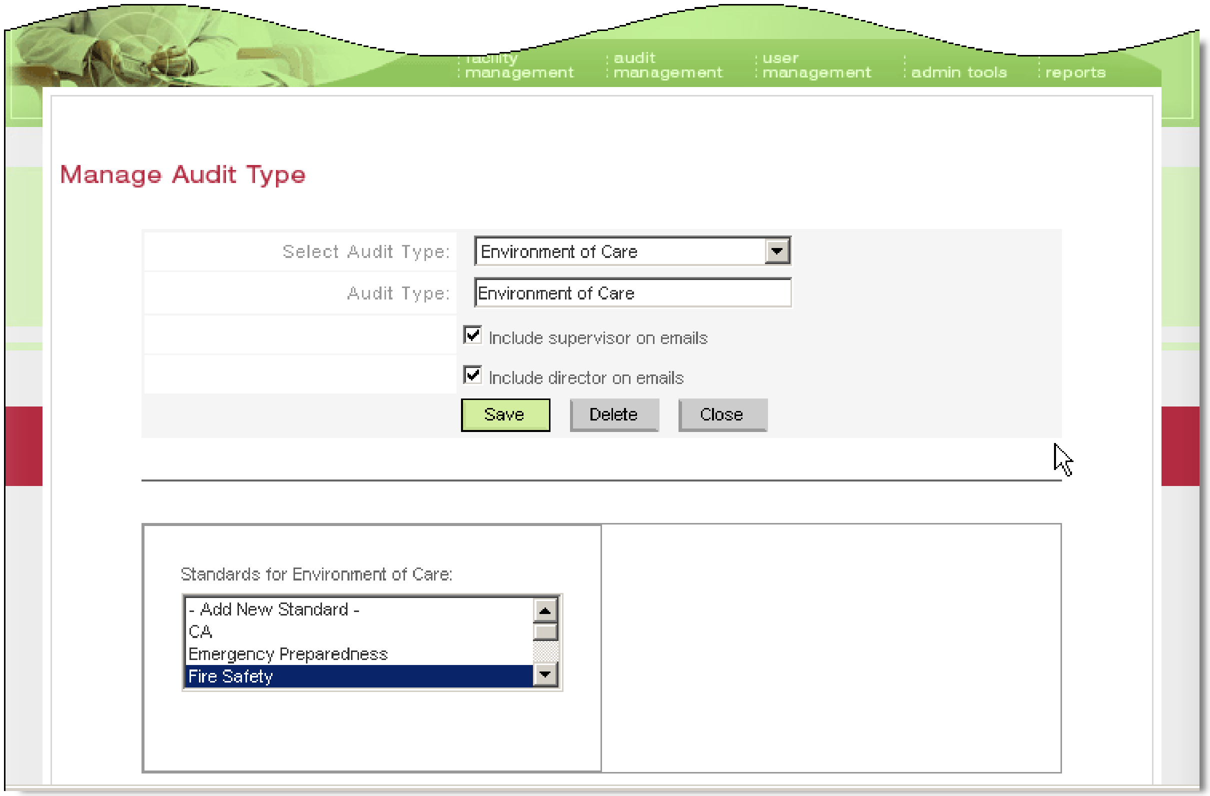
The page refreshes and new fields display. You may need to scroll down to view the fields.

Select or deselect the check boxes to **Include supervisor on emails** and/or **Include director on emails**.

Click on **Save** to save.

In the **Standards** field, specify the standards to be linked to the particular audit type (In the example, the standards are for an “Environment of Care” audit type.).

Click on the standards to apply (in the example, “Fire Safety”).



Manage Audit Type

Select Audit Type: Environment of Care

Audit Type: Environment of Care

☑ Include supervisor on emails

☑ Include director on emails

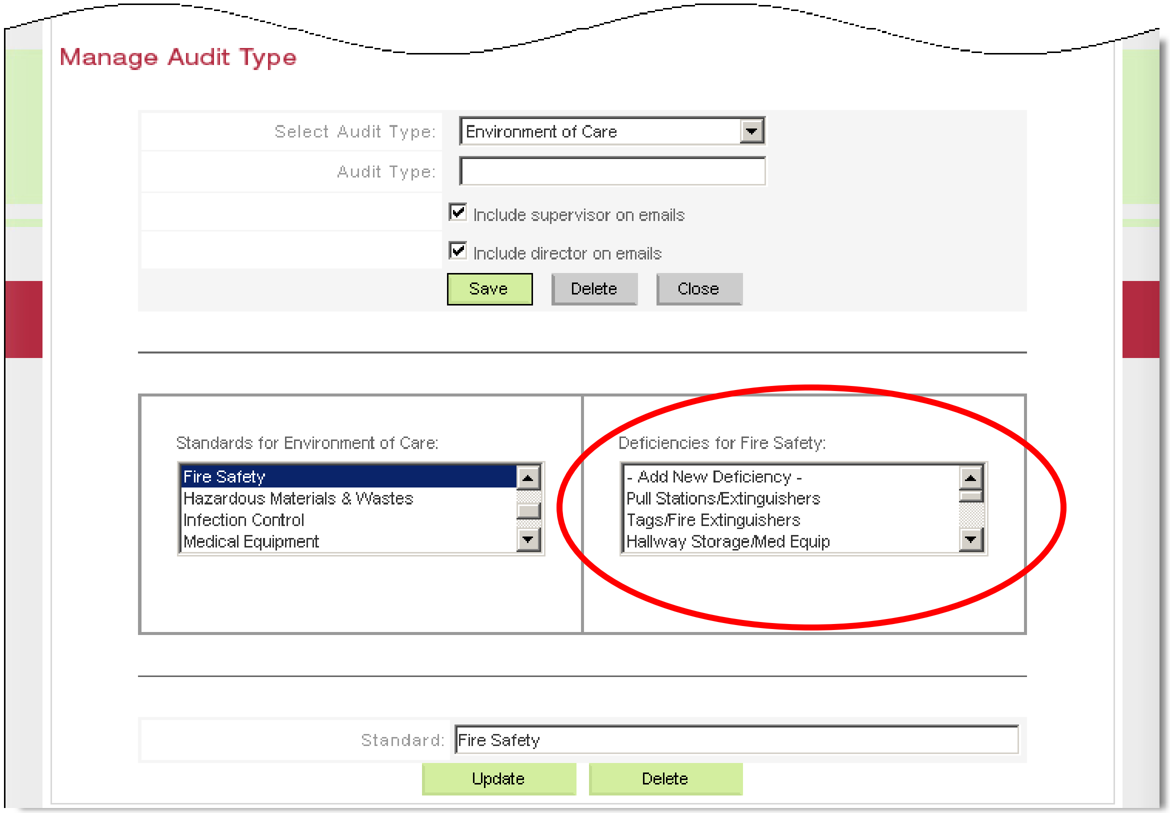
Standards for Environment of Care:

- Add New Standard -
CA
Emergency Preparedness
Fire Safety

The page refreshes and a new field opens, **Deficiencies** (in the example, circled in red). In this field, specify the deficiencies to be associated with the standards for the particular audit type (in the example, “Deficiencies for Fire Safety”).

Select from the drop-down menu or click on **Add New Deficiency** to add a new deficiency to the standard.

Click on **Update** to save.



Manage Audit Type

Select Audit Type: Environment of Care

Audit Type:

☑ Include supervisor on emails

☑ Include director on emails

Standards for Environment of Care:

- Fire Safety
- Hazardous Materials & Wastes
- Infection Control
- Medical Equipment

Deficiencies for Fire Safety:

- - Add New Deficiency -
- Pull Stations/Extinguishers
- Tags/Fire Extinguishers
- Hallway Storage/Med Equip

Standard: Fire Safety

The screen refreshes. Three new fields open, **Short Description**, **Deficiency,** and **Points.** If you have *selected* an existing deficiency for the standard, these fields will be populated. If you have *added* a deficiency, you will enter text into these fields.

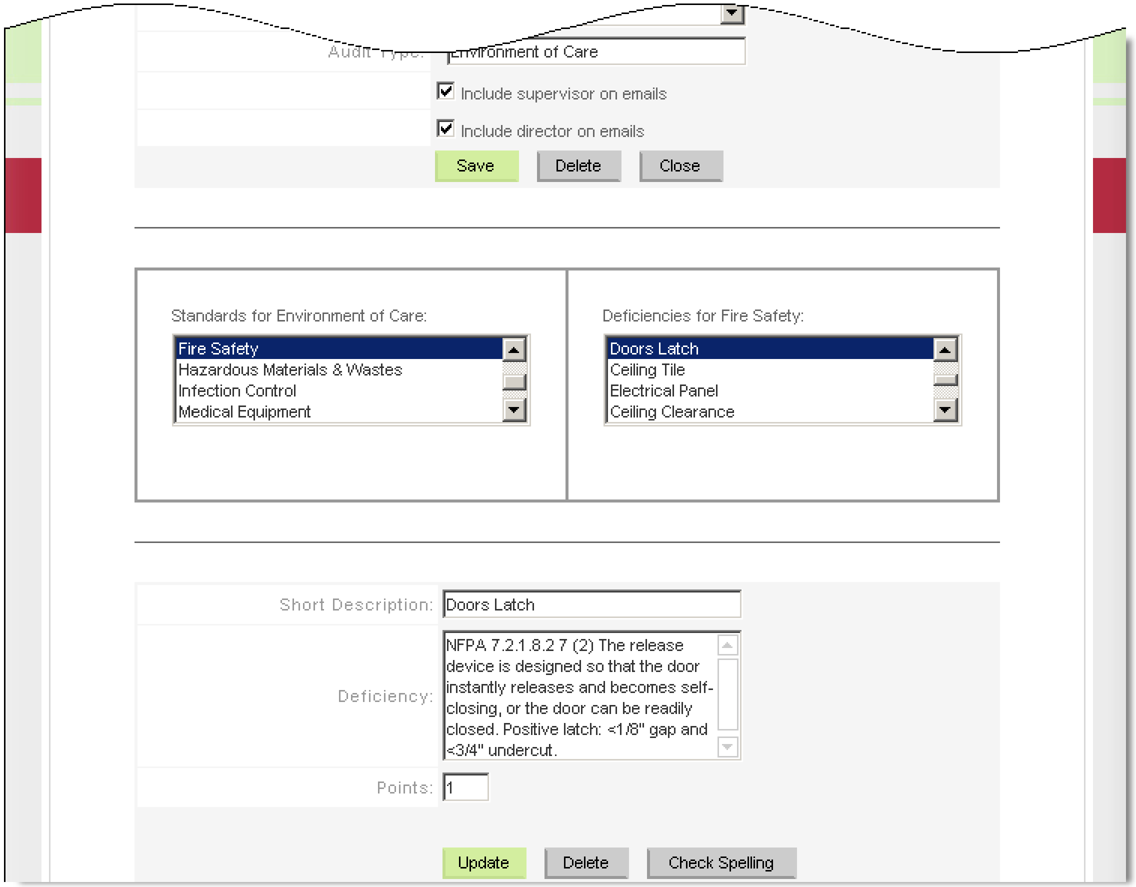
The text in the **Short Description** field is what will display on the PDA during an audit.

The text in the **Deficiency** field is what will display in the body of the email sent following completion of an audit (This text is also available to an auditor to review and edit during an audit.).

Assign a points value for the deficiency in the **Points** field. A value of “1” is a typical point value.

If desired, click **Check Spelling**. A message will pop up, advising you of any words not found in the dictionary.

When you are finished with your entry, click on **Update**. A message will appear at the top of the page advising you that the new deficiency has been added. Click on **Close** to exit the screen.



Audit Type: Environment of Care

☑ Include supervisor on emails

☑ Include director on emails

Standards for Environment of Care:
- Fire Safety
- Hazardous Materials & Wastes
- Infection Control
- Medical Equipment

Deficiencies for Fire Safety:
- Doors Latch
- Ceiling Tile
- Electrical Panel
- Ceiling Clearance

Short Description: Doors Latch

Deficiency: NFPA 7.2.1.8.2 7 (2) The release device is designed so that the door instantly releases and becomes self-closing, or the door can be readily closed. Positive latch: <1/8" gap and <3/4" undercut.

Points: 1

Manage Audits

An Auditor uses the **Manage Audits** function to review, edit, and email audit findings after an audit has been performed, or to create a text document.

LOOKING UP AN AUDIT

First, synchronize the PDA with the computer to transfer audit information to the database. See instructions for Synchronizing the PDA in this User's Manual.

Then, select **Manage Audits** from the **audit management** tab drop-down menu. The **Manage Audits** screen opens.

Manage Audits

Select Hospital System: Bronson Methodist Hospital

Select Date Range: 4/6/2006 to 4/7/2006

Enter a date range in the **Select Date Range** fields.
Type in the start and end dates, using mm/dd/yyyy format, or open the calendar next to each date field to select the dates.

Note: The date range must be at least one day apart. For an audit performed today, the start date is today's date and the end date is tomorrow's date (In the example "4/6/2006" is the start date and "4/7/2006" is the end date).

To enter a date range using the calendars:

Click on the calendar icon to the right of the first **Select Date Range** field.

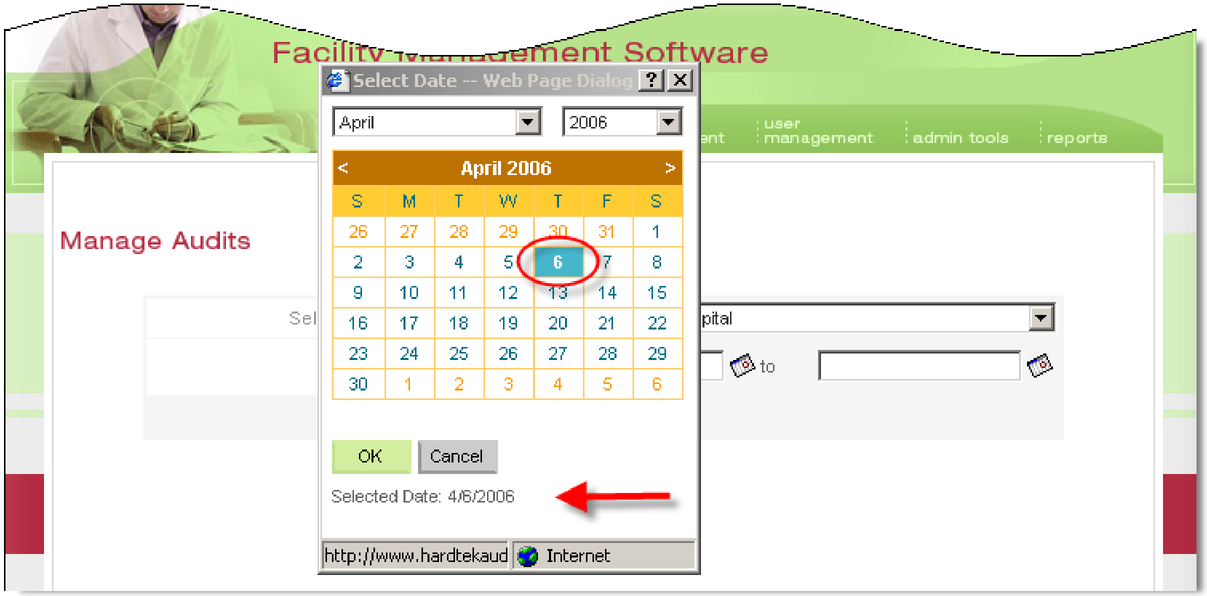
When the calendar opens, select the opening date for your audit search.

Use the cursor (or the "**<**" and " **>**" symbols on your keyboard) to scroll through the **month** and **year** fields. Click on the **day** on the calendar.

The **Selected Date** will appear at the bottom of the screen.

If you are satisfied with the date, click on **OK**.

When the calendar closes, the start date will appear in the left-hand **Date** field of the **Manage Audits** screen (In the example, the start date is 4/6/2006.).



April | 2006

< April 2006 >

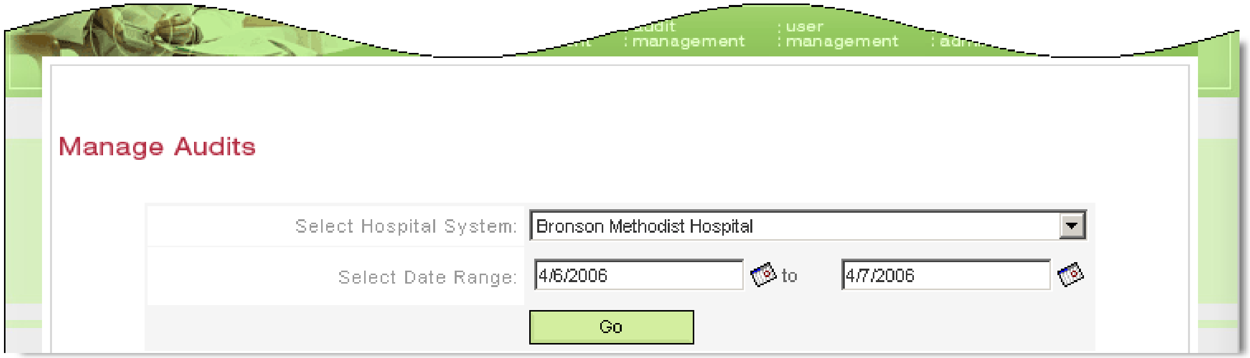
S	M	T	W	T	F	S
26	27	28	29	30	31	1
2	3	4	5	6	7	8
9	10	11	12	13	14	15
16	17	18	19	20	21	22
23	24	25	26	27	28	29
30	1	2	3	4	5	6

Selected Date: 4/6/2006

Repeat the process to select an end date for your date range, using the calendar to the right of the second **Select Date Range** field.

When the calendar closes, the selected end date will appear in the right-hand field of the **Manage Audits** screen.

Click on **Go**.



Manage Audits

Select Hospital System: Bronson Methodist Hospital

Select Date Range: 4/6/2006 to 4/7/2006

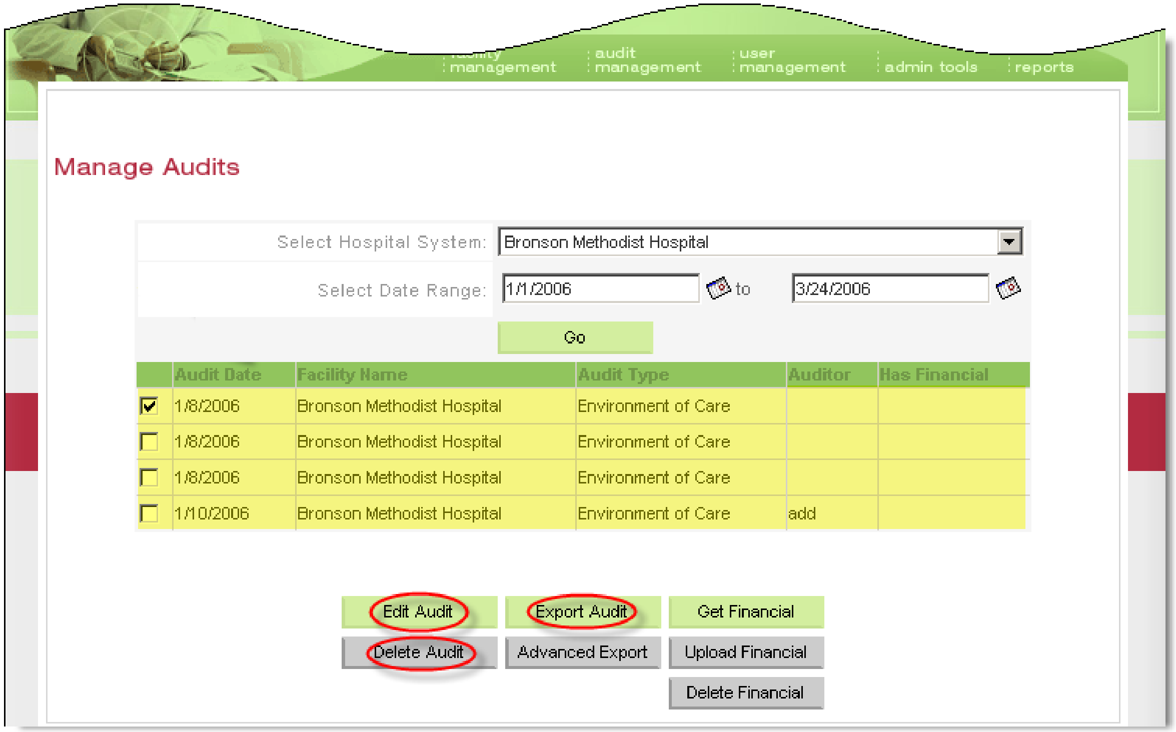
The screen refreshes and displays a table of audits (shown highlighted in yellow) performed in the facility within the selected date range.

A group of light **green** and **gray command buttons** appears at the bottom of the screen. The commands available to most users are shown circled.

To select an audit, click in the check box in the left-most column of the table.

Then select a command button corresponding to the action you wish to perform, as follows.

Click on **Edit Audit** to edit the audit within the database. Edits made within the database will appear on the email and will be reflected in the document when exported to Word. *All permanent edits must be made in the database.*



Manage Audits

Select Hospital System: Bronson Methodist Hospital

Select Date Range: 1/1/2006 to 3/24/2006

	Audit Date	Facility Name	Audit Type	Auditor	Has Financial
☑	1/8/2006	Bronson Methodist Hospital	Environment of Care		
☐	1/8/2006	Bronson Methodist Hospital	Environment of Care		
☐	1/8/2006	Bronson Methodist Hospital	Environment of Care		
☐	1/10/2006	Bronson Methodist Hospital	Environment of Care	add	

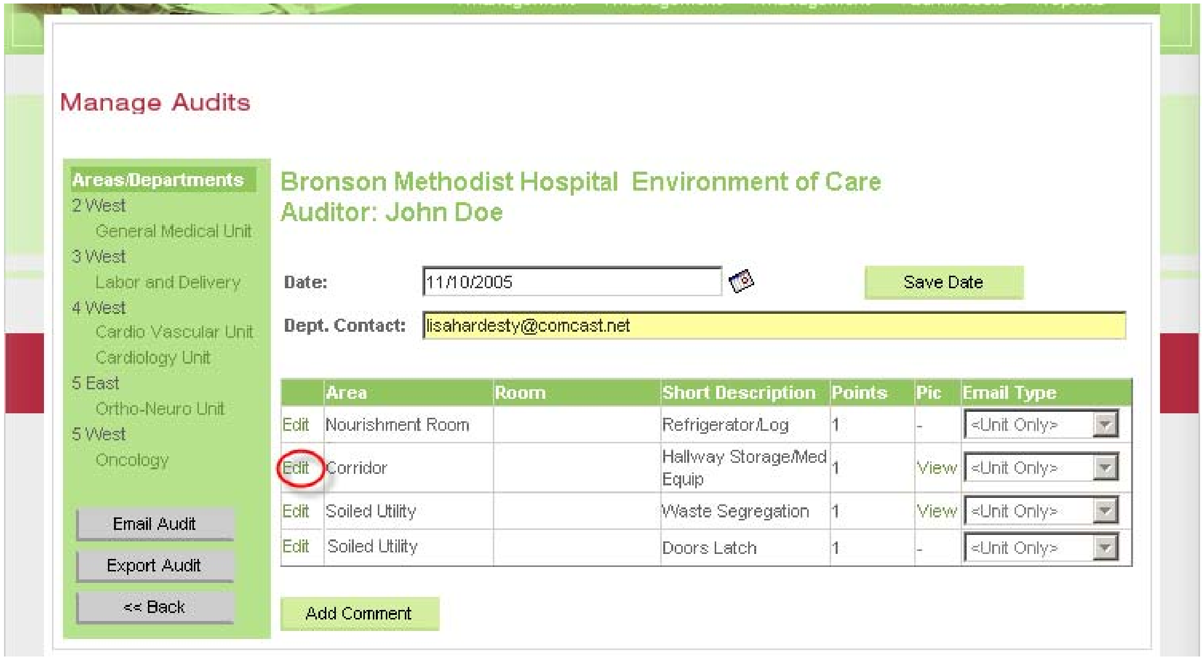
Click on **Export Audit** to open the audit file in Word; edits will not be saved in the database, but you can make formatting changes to the file that will alter the appearance of the printed document. The Word document is the format of the email that is sent.

EDITING AN AUDIT

To edit an audit, click on **Edit Audit**; the **Manage Audits** screen refreshes. The **facility** (“Bronson Methodist Hospital”), **audit type** (“Environment of Care”), and **auditor** (“John Doe”), display as a title in green text.

The **Date** (“11/10/2005”) and **Dept. Contact** (“lisahardesty@comcast.net”) appear below the title. The **Save Date** button (right of screen) lets you change the date, if the date when the audit was performed is different from the date when the findings are edited.

A green sidebar along the left margin shows the **Areas/Departments** audited (“2 West”/“General Medical Unit”, “3 West”/”Labor and Delivery”, etc.).



Manage Audits

Areas/Departments
2 West
General Medical Unit
3 West
Labor and Delivery
4 West
Cardio Vascular Unit
Cardiology Unit
5 East
Ortho-Neuro Unit
5 West
Oncology

Bronson Methodist Hospital Environment of Care
Auditor: John Doe

Date: 11/10/2005

Dept. Contact: lisahardesty@comcast.net

	Area	Room	Short Description	Points	Pic	Email Type
Edit	Nourishment Room		Refrigerator/Log	1	-	<Unit Only>
Edit	Corridor		Hallway Storage/Med Equip	1	View	<Unit Only>
Edit	Soiled Utility		Waste Segregation	1	View	<Unit Only>
Edit	Soiled Utility		Doors Latch	1	-	<Unit Only>

The **table** in the middle of the screen lists audit findings (**Area, Room, Short Description,** etc). If there is a photo attachment, it is indicated in the **Pic** column; clicking on **View** opens the image to let you verify the correct photo has been attached.

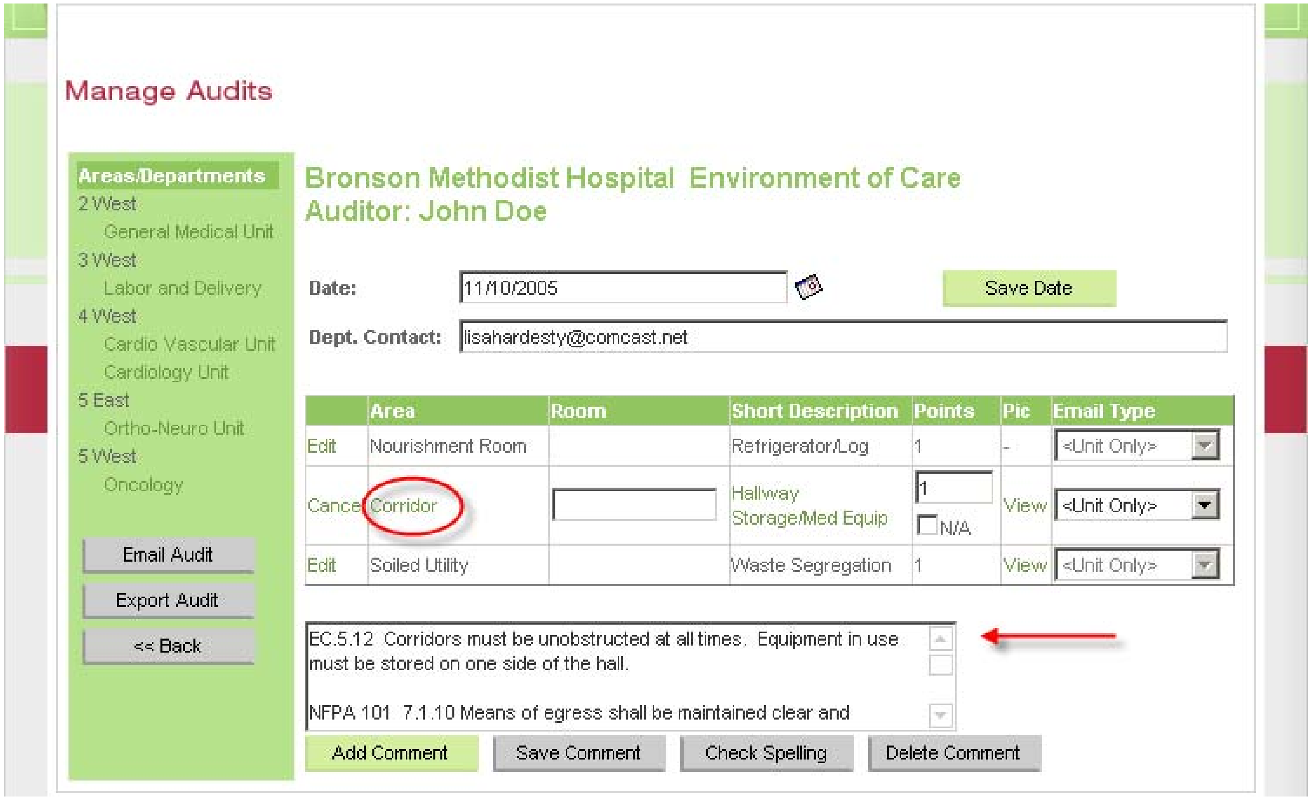
To edit an audit entry, click on **Edit** in the table cell in the left-most column (In the example, circled in red, the edit will be made to the entry for the “Corridor”.).

The screen refreshes. The table row for the selected area (“Corridor”) now displays in green text as editable fields.

A text field displays below the table with the **Description** of the deficiency, including any notes or comments added during the audit. You can edit this material, and any edits made from this screen will be saved in the database and will also appear in the hard copy of the report.

To make edits, first select from the row of buttons that displays under the Description field to **Add, Save, Delete Comment** or **Check Spelling**.

Depending on the audit, clicking on any field from this screen opens additional screens, offering further editing options. For example, you can change the value of assigned points or edit the **Email Type** field to include additional recipients by clicking on a field (In the example, “Corridor”, circled in red). Scroll down, as necessary, to see all the fields and editing options.



Bronson Methodist Hospital Environment of Care
Auditor: John Doe

Date: 11/10/2005

Dept. Contact: lisahardesty@comcast.net

	Area	Room	Short Description	Points	Pic	Email Type
Edit	Nourishment Room		Refrigerator/Log	1	-	<Unit Only>
Cance	Corridor		Hallway Storage/Med Equip	1 ☐ N/A	View	<Unit Only>
Edit	Soiled Utility		Waste Segregation	1	View	<Unit Only>

EC.5.12 Corridors must be unobstructed at all times. Equipment in use must be stored on one side of the hall.

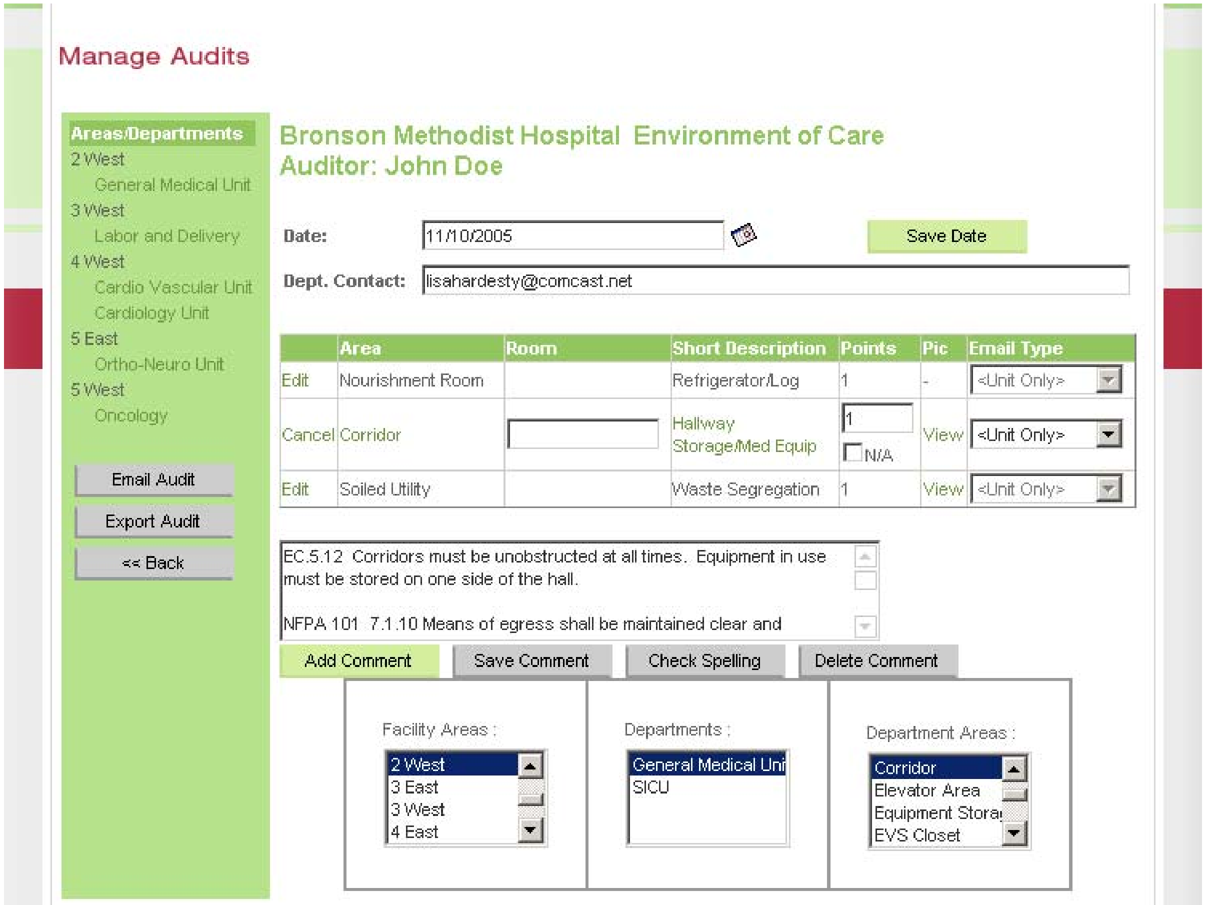
NFPA 101 7.1.10 Means of egress shall be maintained clear and

The screen refreshes and three new boxes open across the bottom of the page that locate where the deficiency was observed by **Facility Areas**, **Departments**, and **Department Areas**.

(In the example, the deficiency was noted in “2 West” of the “General Medical Unit” in the “Corridor”.).

You can change/edit any of these locations, as necessary, by selecting alternative areas from the drop-down lists.

Note: Remember to scroll down, as necessary, to see all the fields and editing options.



Bronson Methodist Hospital Environment of Care
Auditor: John Doe

Date: 11/10/2005

Dept. Contact: lisahardesty@comcast.net

	Area	Room	Short Description	Points	Pic	Email Type
Edit	Nourishment Room		Refrigerator/Log	1	-	<Unit Only>
Cancel	Corridor		Hallway Storage/Med Equip	1 ☐ N/A	View	<Unit Only>
Edit	Soiled Utility		Waste Segregation	1	View	<Unit Only>

EC.5.12 Corridors must be unobstructed at all times. Equipment in use must be stored on one side of the hall.

NFPA 101 7.1.10 Means of egress shall be maintained clear and

Facility Areas :
2 West
3 East
3 West
4 East

Departments :
General Medical Uni
SICU

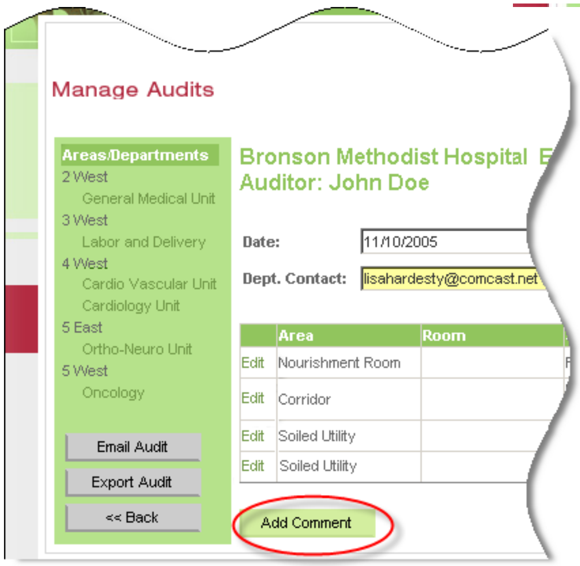
Department Areas :
Corridor
Elevator Area
Equipment Stora
EVS Closet

Another option from the Manage Audits screen is to click on the **Add Comment** button (left image, circled in red).

The screen refreshes. A new table row appears (image on right) in which to enter a new deficiency.

Select an element (in the example, “Fire Safety”) from the **Elements List**.

Select a department area (in the example, “Clean Supply”) from the **Department Areas** list.

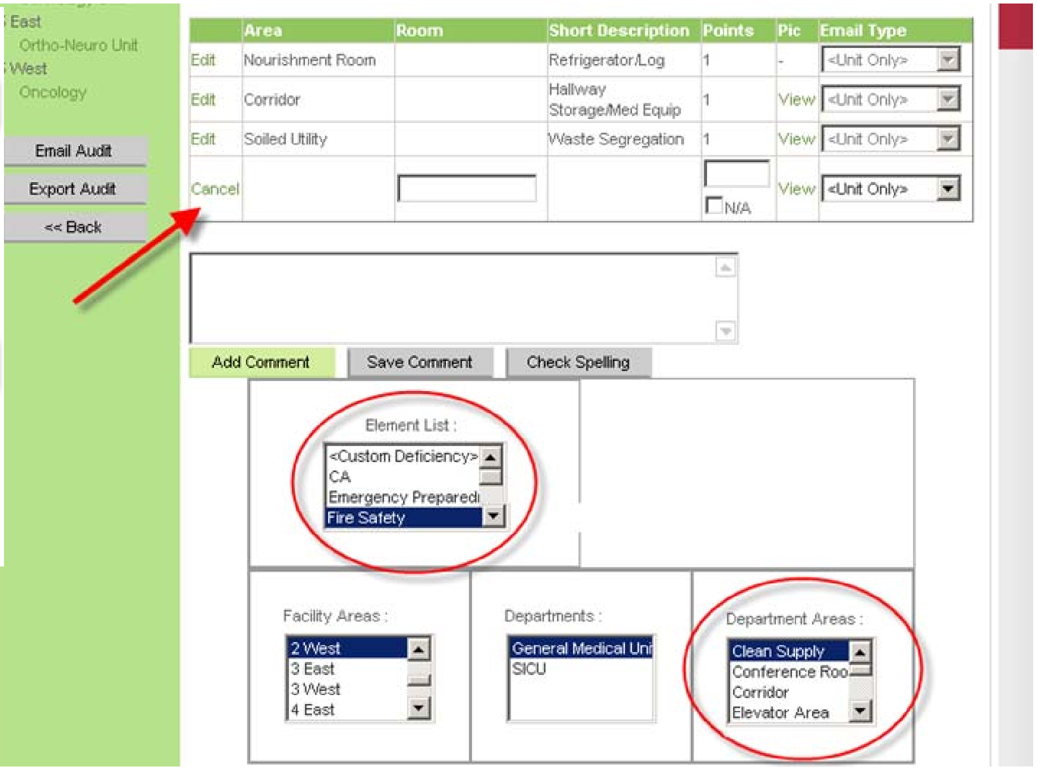


Bronson Methodist Hospital E
Auditor: John Doe

Date: 11/10/2005

Dept. Contact: lisahardesty@comcast.net

	Area	Room
Edit	Nourishment Room	
Edit	Corridor	
Edit	Soiled Utility	
Edit	Soiled Utility	

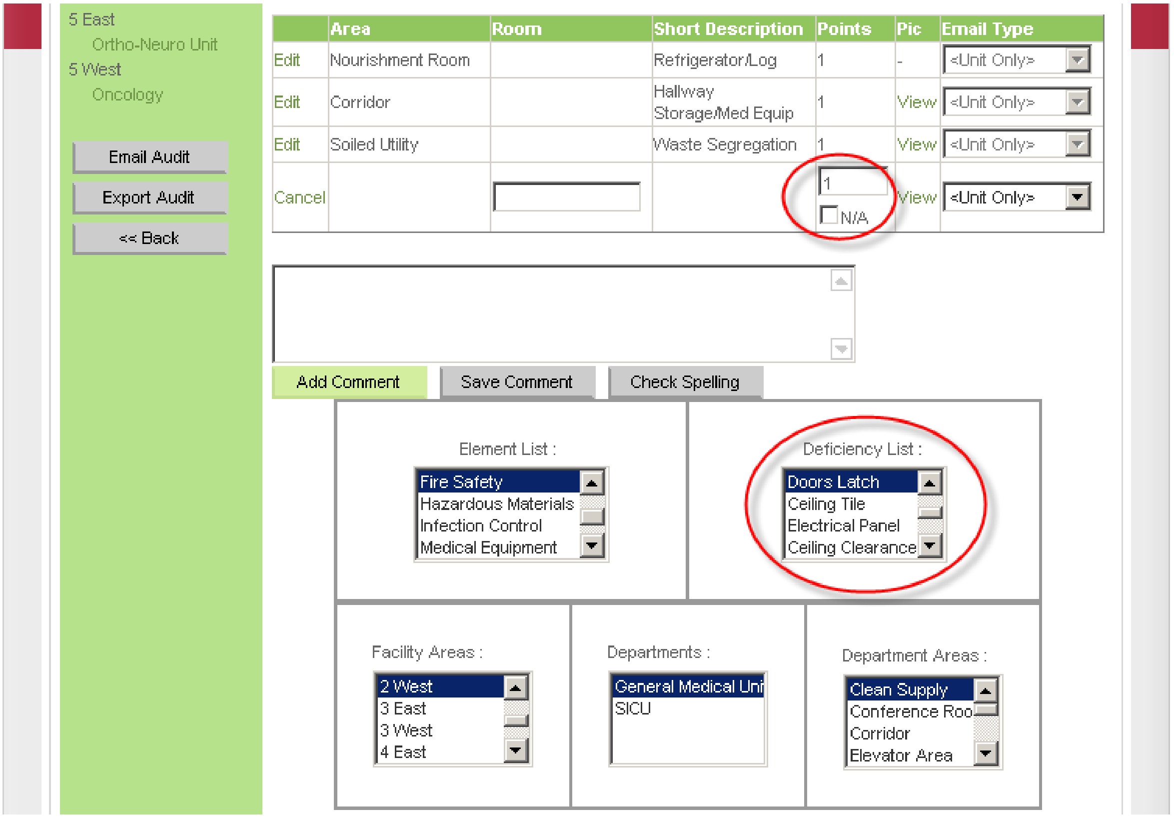


	Area	Room	Short Description	Points	Pic	Email Type
Edit	Nourishment Room		Refrigerator/Log	1	-	<Unit Only>
Edit	Corridor		Hallway Storage/Med Equip	1	View	<Unit Only>
Edit	Soiled Utility		Waste Segregation	1	View	<Unit Only>
Cancel				☐ N/A	View	<Unit Only>

The screen refreshes. A **Deficiency List** appears. Select a deficiency from the drop-down list (in the example, “Doors Latch”).

Assign a points value in the **Points** column of the table (in the example, “1”).

Click on the gray **Save Comment** button.



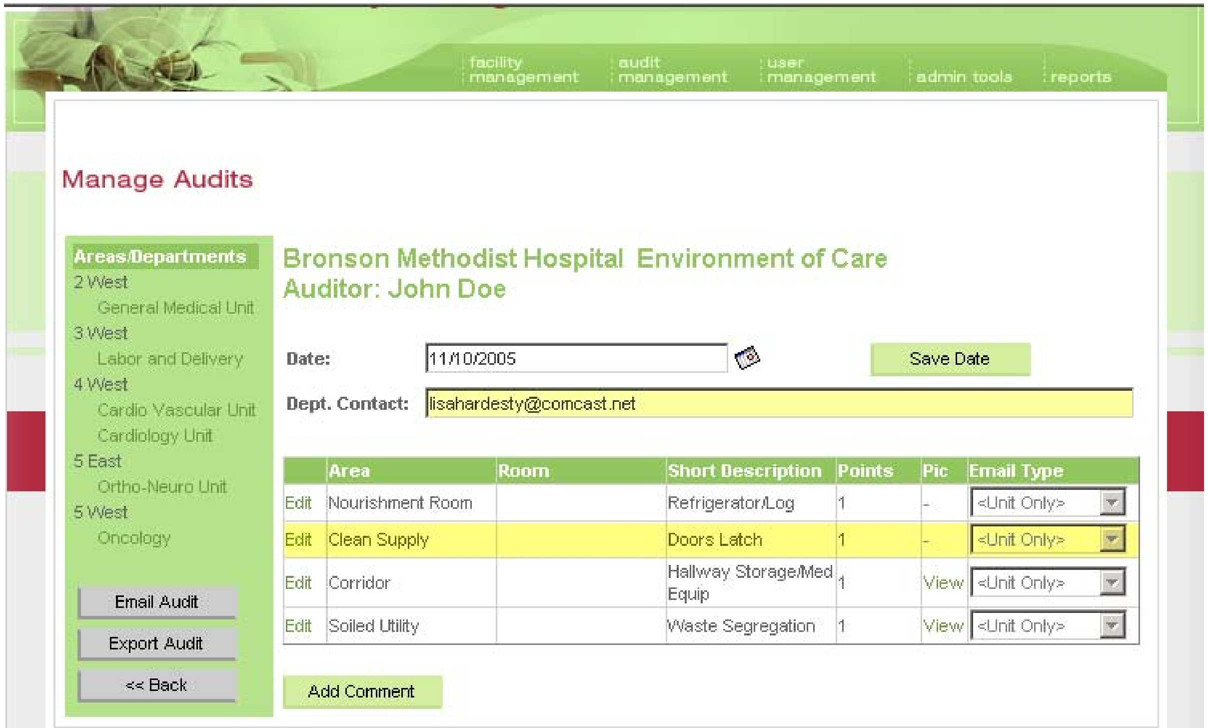
	Area	Room	Short Description	Points	Pic	Email Type
Edit	Nourishment Room		Refrigerator/Log	1	-	<Unit Only>
Edit	Corridor		Hallway Storage/Med Equip	1	View	<Unit Only>
Edit	Soiled Utility		Waste Segregation	1	View	<Unit Only>
Cancel				1 ☐ N/A	View	<Unit Only>

The screen refreshes.

The deficiency now displays in the table of audit findings. Note that the listings are now in alphabetical order.

In the example (highlighted in yellow), Auditor John Doe noted a “Doors Latch” deficiency in the Clean Supply Area of 2 West in the General Medical Unit of Bronson Methodist Hospital during an Environment of Care Audit conducted on 11/10/2005.

Note: Remember, because these edits have been made using the “Edit Audit” command, they will be saved in the database.



Manage Audits

Areas/Departments
2 West
General Medical Unit
3 West
Labor and Delivery
4 West
Cardio Vascular Unit
Cardiology Unit
5 East
Ortho-Neuro Unit
5 West
Oncology

Bronson Methodist Hospital Environment of Care
Auditor: John Doe

Date: 11/10/2005

Dept. Contact: lisahardesty@comcast.net

	Area	Room	Short Description	Points	Pic	Email Type
Edit	Nourishment Room		Refrigerator/Log	1	-	<Unit Only>
Edit	Clean Supply		Doors Latch	1	-	<Unit Only>
Edit	Corridor		Hallway Storage/Med Equip	1	View	<Unit Only>
Edit	Soiled Utility		Waste Segregation	1	View	<Unit Only>

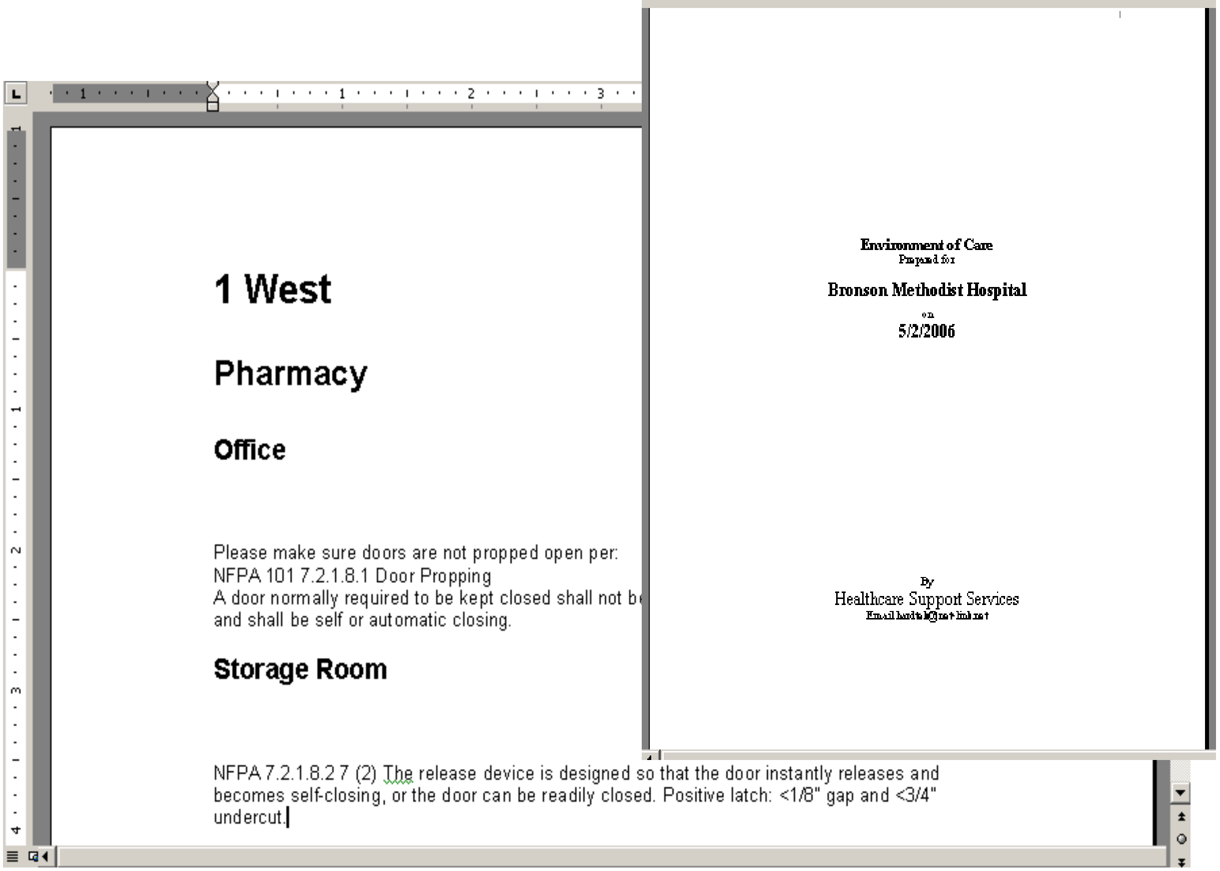
EXPORTING AN AUDIT

The **Export Audit** command generates a Word document for printing.

You will no longer be working in the database, so any edits you make will be saved to the Word file only and will not be saved in the database.

You will be prompted to **Save As**; choose the folder in which you want to save the file, and type in a file name, just as you would any Word document.

The audit document, with cover sheet (shown), is automatically populated with information from the database.



1 West

Pharmacy

Office

Please make sure doors are not propped open per:
NFPA 101 7.2.1.8.1 Door Propping
A door normally required to be kept closed shall not b
and shall be self or automatic closing.

Storage Room

NFPA 7.2.1.8.2 7 (2) The release device is designed so that the door instantly releases and becomes self-closing, or the door can be readily closed. Positive latch: <1/8" gap and <3/4" undercut.

Environment of Care
Prepared for
Bronson Methodist Hospital
on
5/2/2006

By
Healthcare Support Services
Email [illegible]

EMAILING AN AUDIT

When you are ready to email audit findings, click on **Email Audit** in the green field on the left of the **Manage Audits** screen. The screen refreshes and a text field displays in which to type a brief memo to recipients.

There is no need to address emails to recipients. Emails are automatically sent to unit managers and all individuals who have been previously identified to be included on the email. Each person will receive only the portion of the audit relevant to his or her area of responsibility.

Click on **Send** to send the email. The audit, and any photos, will be sent as attachments to your memo.

Bronson Methodist Hospital Environment of Care
Auditor: John Doe

Date: 11/10/2005

Dr. Kildare:

Here is the audit you requested.

John

Note: Remember that you must manually delete photos from the PDA after uploading the audit to the database. See the section on Deleting a Photo in this User's Manual for instructions.

USER MANAGEMENT TASKS

Create User

Requires Permission Level II
You can only create a user with a lower permission level than your own.

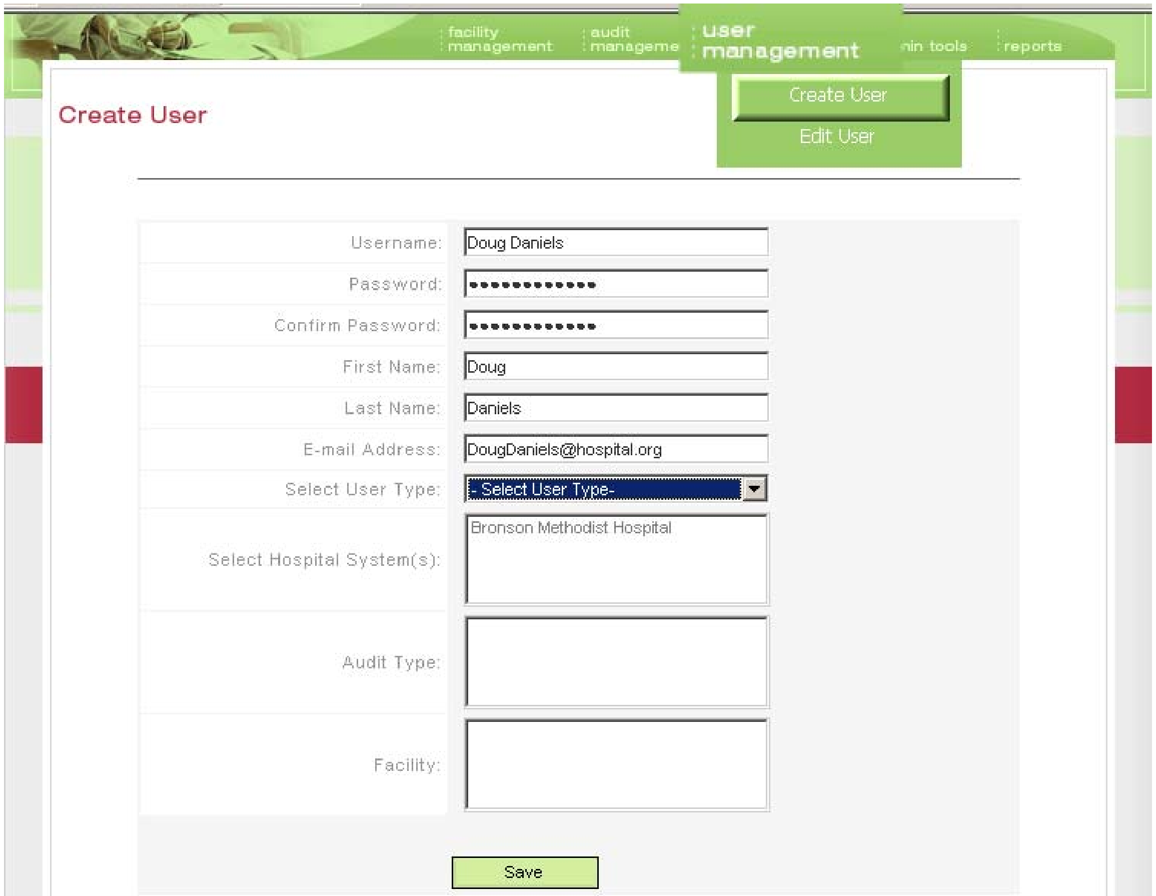
Select **Create User** from the **user management** tab drop-down menu.

When the **Create User** screen opens, enter the appropriate information in the **Username** and **Password** fields. *Passwords must have less than 20 characters and are case sensitive.*

Retype the password in the **Confirm Password** field.

Enter the user's **First Name** and **Last Name** in the appropriate fields.

Select a user type from the **Select User Type** drop-down menu. The user type is linked to permission level.



Create User

Username: Doug Daniels
Password: •••••••••••••
Confirm Password: •••••••••••••
First Name: Doug
Last Name: Daniels
E-mail Address: DougDaniels@hospital.org
Select User Type: -Select User Type-
Select Hospital System(s): Bronson Methodist Hospital
Audit Type:
Facility:

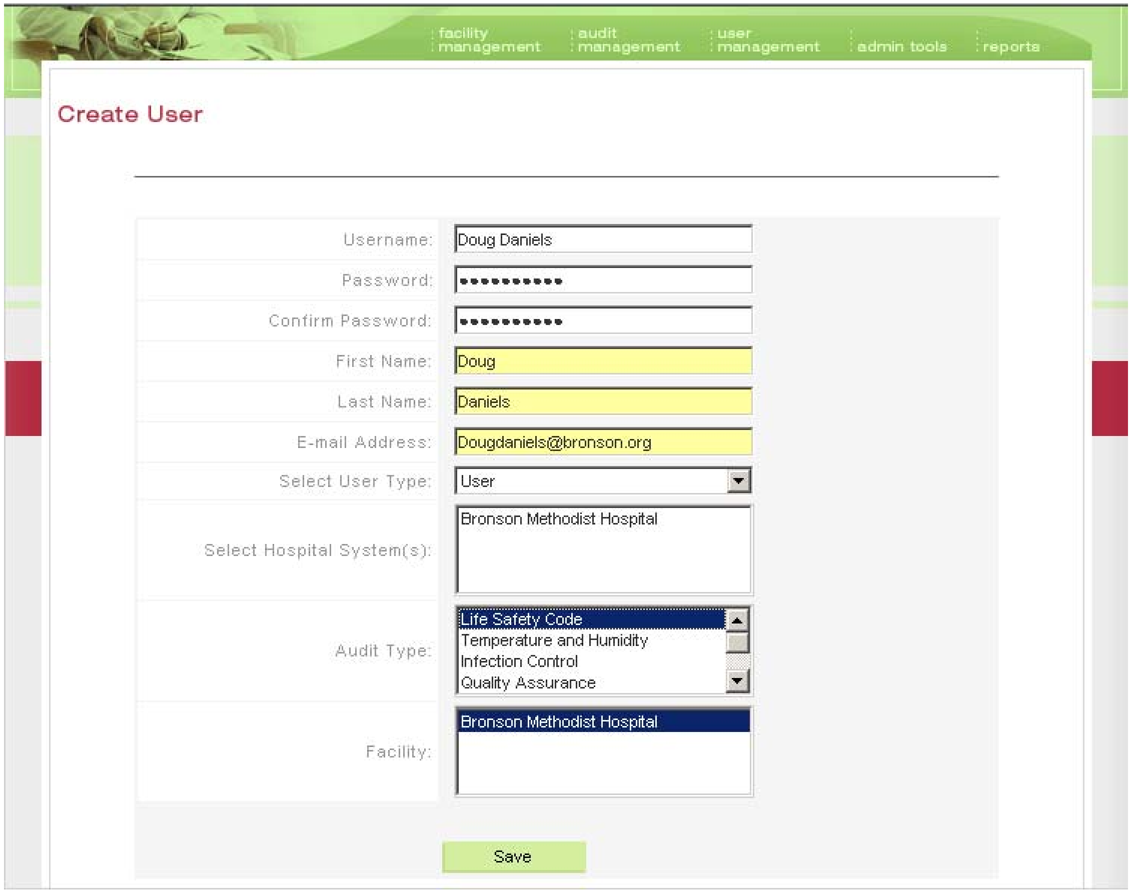
To review the permission levels, refer to the Permission Levels section of this User's Manual. User types include: Audit Type Admin, Facility Admin, Hospital System Admin, and User.

Click on **Save**.

The screen refreshes. New fields display that link the user to one or more **Audit Type** and **Facility** and determine the user's permission level (In the example, "Doug Daniels", a "User", will have permission at "Bronson Methodist Hospital" to perform "Life Safety Code" audits.).

Click on **Save** to save. The screen refreshes. A message at the top left of the screen will indicate that the user was created.

If the task was unsuccessful, an error message will appear indicating the problem (e.g., password problem).



Create User

Username: Doug Daniels
Password: ●●●●●●●●●●●
Confirm Password: ●●●●●●●●●●●
First Name: Doug
Last Name: Daniels
E-mail Address: Dougdaniels@bronson.org
Select User Type: User
Select Hospital System(s): Bronson Methodist Hospital
Audit Type: Life Safety Code
Temperature and Humidity
Infection Control
Quality Assurance
Facility: Bronson Methodist Hospital

Edit User

Requires Permission Level I

Select **Edit User** from the **user management** tab drop-down menu.

When the **Edit User** screen appears:

Select the hospital system from the **Select Hospital System** drop-down menu.

Select a user from the **Select User** drop-down menu.

Note: If a user’s name does not appear in the **Select User** field drop-down list, you will have to first select the audit type and the facility to which the user is linked.

Edit User

Select Hospital System: Bronson Methodist Hospital

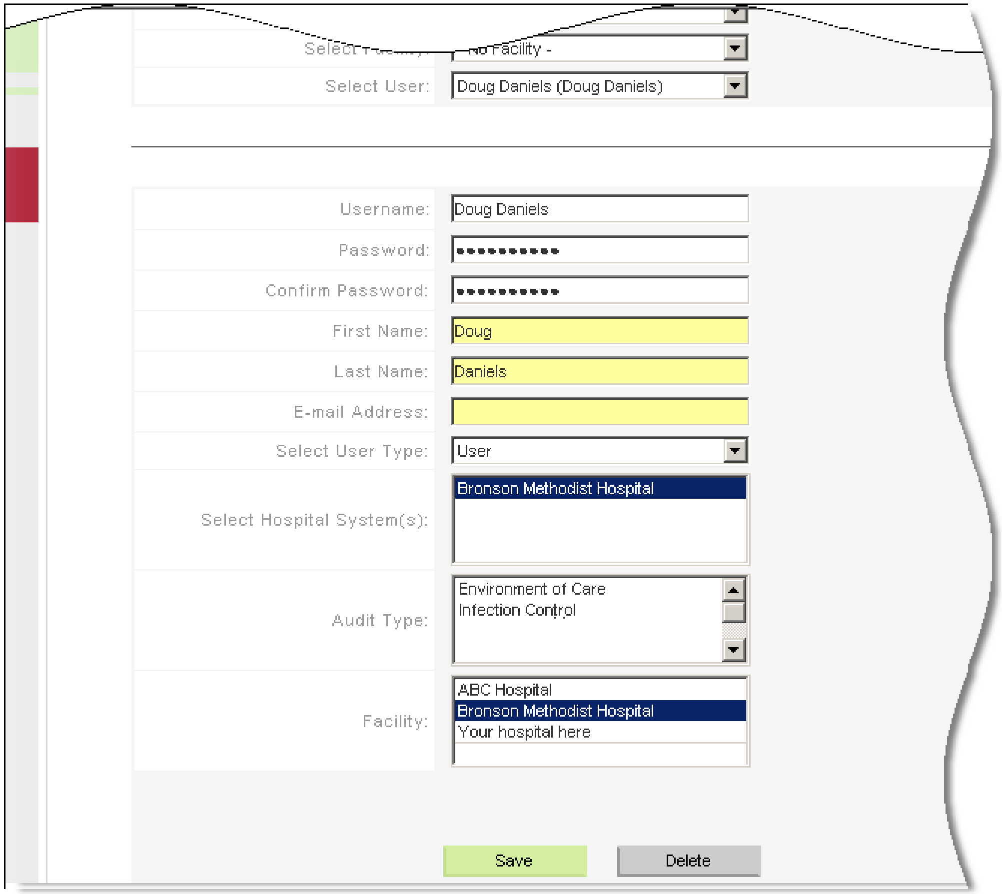
Select Audit Type: Environment of Care

Select Facility: Bronson Methodist Hospital

Select User: - Select User -

The screen will refresh and new fields will open, allowing you to edit the **User Type**, **Audit Type**, and **Facility** fields.

Click on **Save** to save.



Select Facility: - No Facility -

Select User: Doug Daniels (Doug Daniels)

Username: Doug Daniels

Password: ●●●●●●●●●●●

Confirm Password: ●●●●●●●●●●●

First Name: Doug

Last Name: Daniels

E-mail Address:

Select User Type: User

Select Hospital System(s): Bronson Methodist Hospital

Audit Type: Environment of Care, Infection Control

Facility: ABC Hospital, Bronson Methodist Hospital, Your hospital here

REPORT TASKS

Options under the **reports** tab include **Ad Hoc** reports and the following 10 ten **Static** reports: **Audit History, Audit Detail/Summary, Summary, Director, Supervisor, Department, Standard, Deficiency, Auditor,** and **Tally Points**.

Reports are cumulative documentation designed for trending and for committee meetings and regulatory records requirements.

Ad hoc reports are specialized reports generated by entering specific variables.

Static reports are commonly used reports with few variables. The ad hoc reports function is the more powerful tool because it allows you to pull data for an entire facility into a single report.

Note: Remember, the term “reports” does not apply to the Word document of audit findings emailed to administrators.

Preparing a Static Report

AUDIT DETAIL/SUMMARY REPORT

The most basic static report is the Audit Detail/Summary Report.

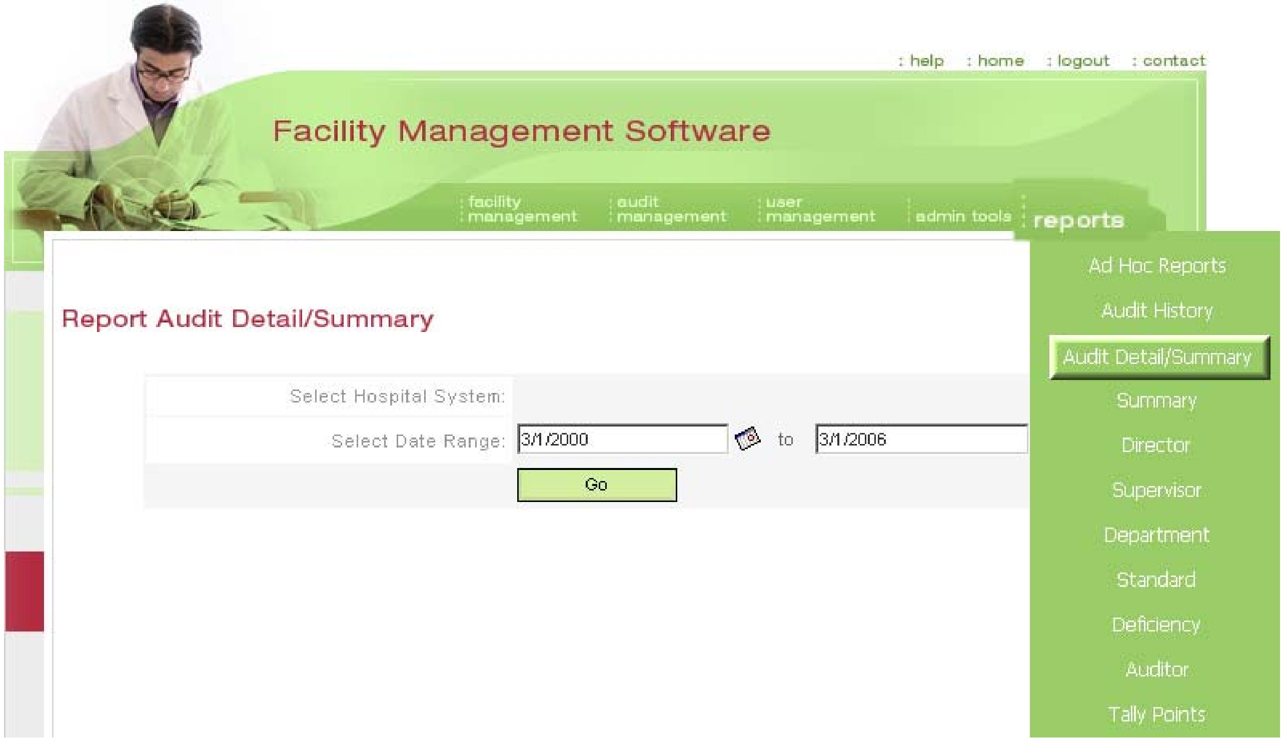
To generate this type of report, click on **Audit Detail/Summary** in the **reports** tab drop-down menu.

The **Report Audit Detail/Summary** screen opens.

Select a hospital system from the **Select Hospital System** drop-down menu, if the system does not appear on the screen.

Select a date range from the **Select Date Range** fields.

Click on **Go**.



Report Audit Detail/Summary

Select Hospital System:

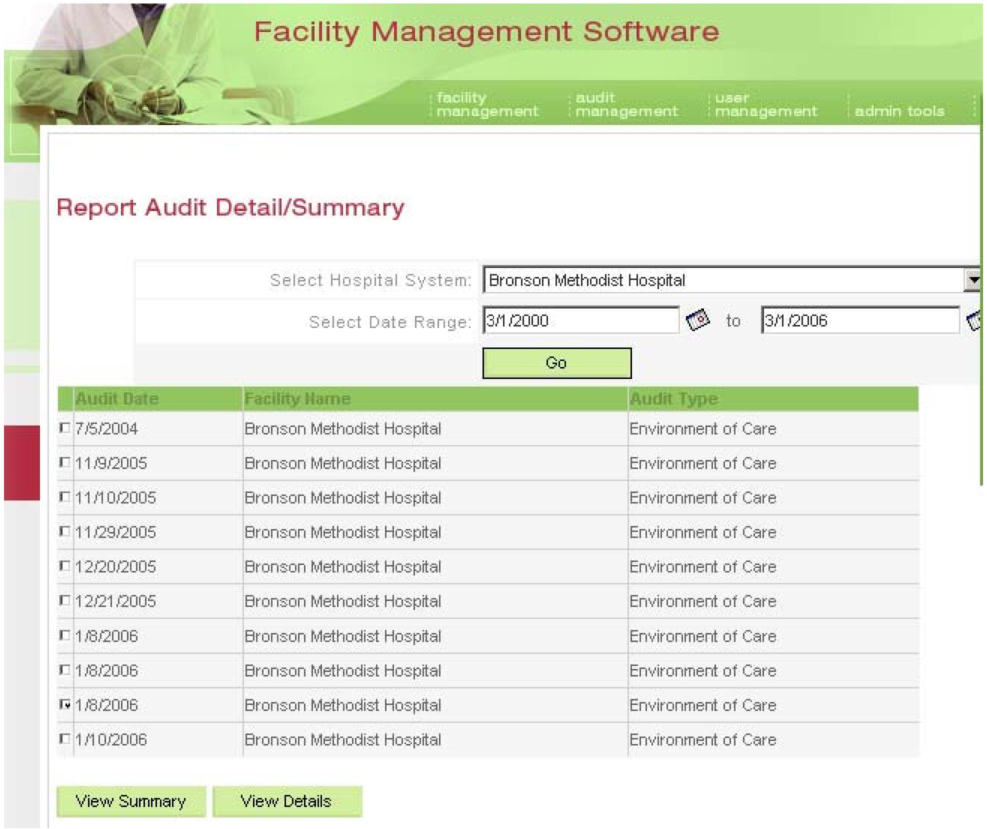
Select Date Range: 3/1/2000 to 3/1/2006

The screen refreshes; a table of audits displays.

Select an audit by clicking in the check box in the left table column.

Click on **View Summary** to see an audit summary.

Click **View Details** to see a more detailed report.



Report Audit Detail/Summary

Select Hospital System: Bronson Methodist Hospital

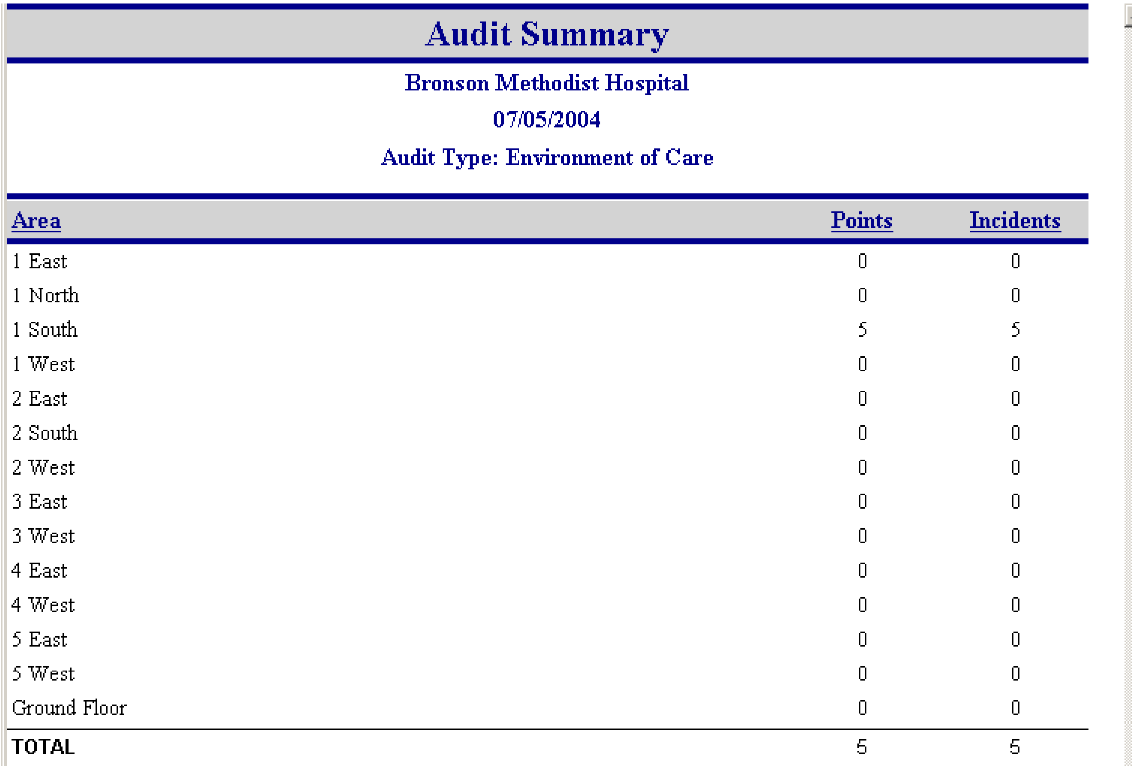
Select Date Range: 3/1/2000 to 3/1/2006

Audit Date	Facility Name	Audit Type
☐ 7/5/2004	Bronson Methodist Hospital	Environment of Care
☐ 11/9/2005	Bronson Methodist Hospital	Environment of Care
☐ 11/10/2005	Bronson Methodist Hospital	Environment of Care
☐ 11/29/2005	Bronson Methodist Hospital	Environment of Care
☐ 12/20/2005	Bronson Methodist Hospital	Environment of Care
☐ 12/21/2005	Bronson Methodist Hospital	Environment of Care
☐ 1/8/2006	Bronson Methodist Hospital	Environment of Care
☐ 1/8/2006	Bronson Methodist Hospital	Environment of Care
☑ 1/8/2006	Bronson Methodist Hospital	Environment of Care
☐ 1/10/2006	Bronson Methodist Hospital	Environment of Care

The screen refreshes and a Word file opens.

If you selected **View Summary**, the report displays the **Areas**, **Points**, and the number of **Incidents** (**Deficiencies**). If you selected **View Details**, the report also displays the **Departments**.

In the example, five incidents were recorded during an Environment of Care Audit conducted on 7/5/2004 at Bronson Methodist Hospital.



Audit Summary

Bronson Methodist Hospital

07/05/2004

Audit Type: Environment of Care

Area	Points	Incidents
1 East	0	0
1 North	0	0
1 South	5	5
1 West	0	0
2 East	0	0
2 South	0	0
2 West	0	0
3 East	0	0
3 West	0	0
4 East	0	0
4 West	0	0
5 East	0	0
5 West	0	0
Ground Floor	0	0
TOTAL	5	5

SUMMARY, DIRECTOR, SUPERVISOR, AND AUDITOR REPORTS

The **Summary, Director, Supervisor**, and **Auditor Reports** follow the same format and provide similar data: number of deficiencies, area, facility, date range, and audit type.

These four reports are “drill-down” reports. Each time a screen refreshes, a new screen opens and you can click on another element to gather another piece of information. For example:

- The **Summary Report** can show, not only the areas in the facility where the deficiencies are occurring, but also the kinds of deficiencies in each area.
- The **Director** and **Supervisor Reports** can alert these individuals to the kinds of deficiencies to be on the watch for in their area of responsibility, and help them trend areas of improvement.
- The **Auditor Report** can show a hospital administrator the types of deficiencies that each auditor is documenting; from this information, the administrator can determine the consistency among auditors and decide whether training may be required to improve it.

The example shows how to generate a **Summary Report**. The steps for generating a **Director, Supervisor,** or **Auditor Report** are the same.

Select **Summary** from the **reports** tab drop-down menu.

When the **Report Summary** screen displays:

Report Summary

Select Hospital System:

Select Facility:

Select Audit Type:

Date Range: 3/1/2000 to 3/1/2006

Select the hospital system from the **Select Hospital System** field.

Select the facility from the **Select** Facility field.

Select the audit type from the **Select Audit Type** field.

Enter a date range in the **Date Range** fields.

Click on **Go**.

The screen refreshes and a report displays as a bar graph.

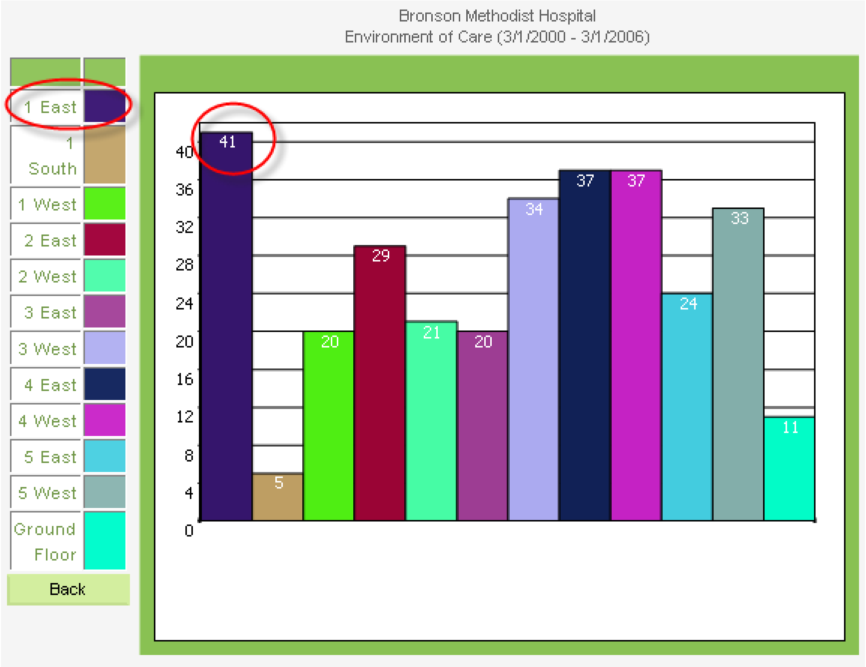
The report title gives the facility, audit type, and date range.

The y axis shows the number of deficiencies.

The x axis shows the facility area; each bar is color-coded to an area in the column to the left of the graph.

In the example (items circled in red), 41 Environment of Care deficiencies were found on 1East of Bronson Methodist Hospital between 3/1/2000-3/1/2006.

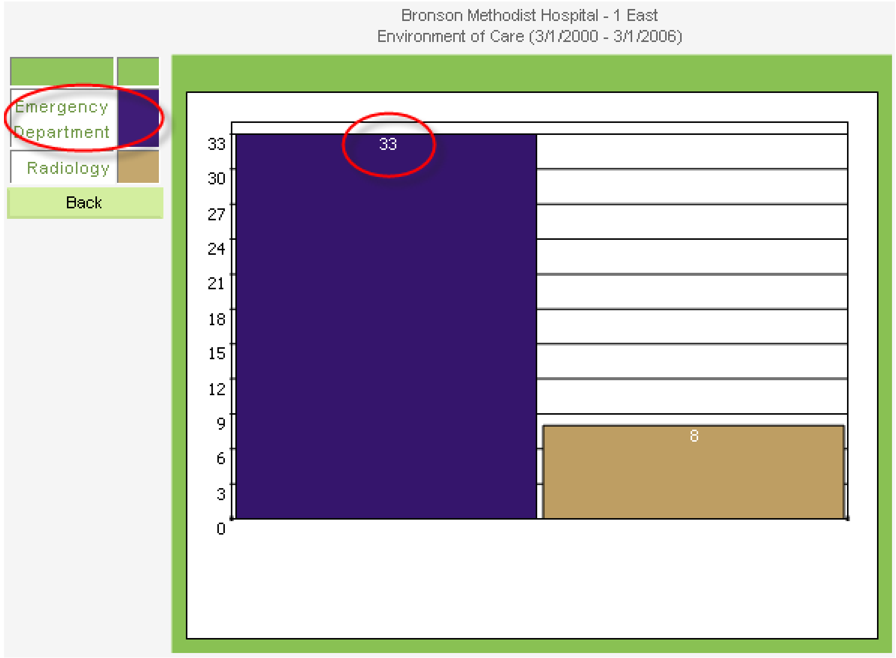
Drill down further by clicking on a facility area in the left column (in the example, “I East”).



The screen refreshes. A new bar graph displays, showing the number of deficiencies noted within each department of the selected area.

In the example, 33 Environment of Care deficiencies were found in the Emergency Department of 1 East, Bronson Methodist Hospital, between 3/1/2000 and 3/1/2006.

Click on a department in the left-hand column to obtain more information about the deficiencies (in the example, “Emergency Department”).

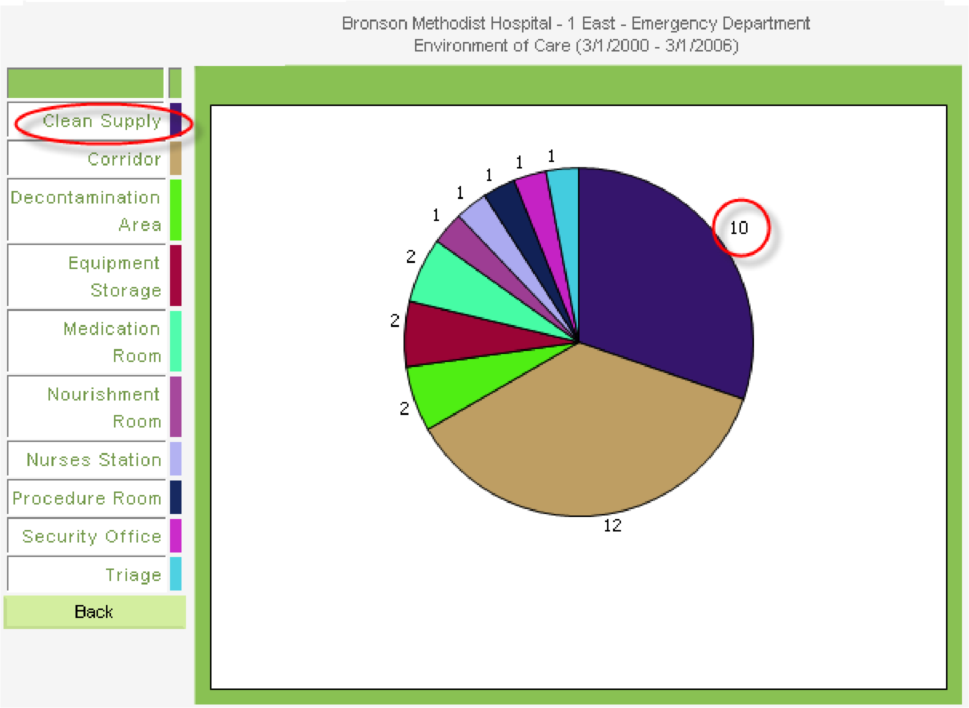


Bronson Methodist Hospital - 1 East
Environment of Care (3/1/2000 - 3/1/2006)

The page refreshes. The new screen displays the areas in the department and the number of deficiencies in each area, in a pie chart format that makes it easy to see the relative frequency of each deficiency.

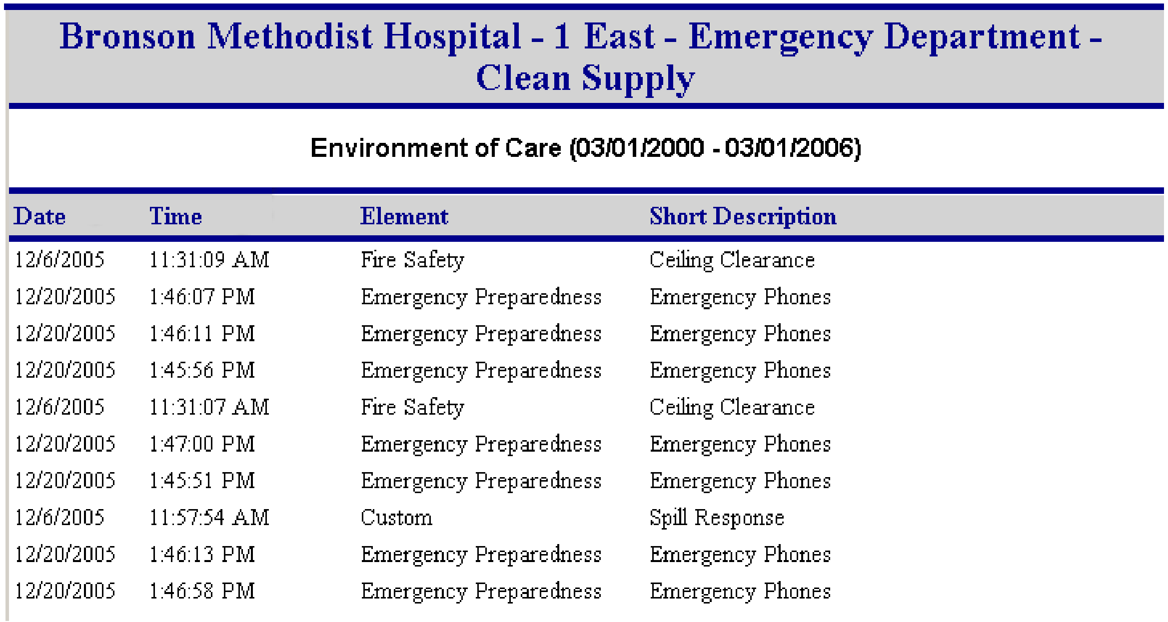
In the example, 10 Environment of Care deficiencies were found in the Clean Supply Area of the Emergency Department on 1 East, Bronson Methodist Hospital, between 3/1/2000 and 3/1/2006.

Click on an area in the left table column (in the example, "Clean Supply") to gather yet more information.



Bronson Methodist Hospital - 1 East - Emergency Department
Environment of Care (3/1/2000 - 3/1/2006)

The screen refreshes and a Word document opens that lists each individual deficiency in the area and the date and time when each incident was noted.



Bronson Methodist Hospital - 1 East - Emergency Department - Clean Supply

Environment of Care (03/01/2000 - 03/01/2006)

Date	Time	Element	Short Description
12/6/2005	11:31:09 AM	Fire Safety	Ceiling Clearance
12/20/2005	1:46:07 PM	Emergency Preparedness	Emergency Phones
12/20/2005	1:46:11 PM	Emergency Preparedness	Emergency Phones
12/20/2005	1:45:56 PM	Emergency Preparedness	Emergency Phones
12/6/2005	11:31:07 AM	Fire Safety	Ceiling Clearance
12/20/2005	1:47:00 PM	Emergency Preparedness	Emergency Phones
12/20/2005	1:45:51 PM	Emergency Preparedness	Emergency Phones
12/6/2005	11:57:54 AM	Custom	Spill Response
12/20/2005	1:46:13 PM	Emergency Preparedness	Emergency Phones
12/20/2005	1:46:58 PM	Emergency Preparedness	Emergency Phones

STANDARD REPORT

The **Standard Report** analyzes the frequency of deficiencies related to a particular standard associated with an audit type.

The Standard Report is a drill-down report that provides more information with each successive screen.

To generate a Standard Report, select **Standard** from the **reports** tab drop-down menu.

When the **Report Standard** screen displays:

Report Standard

Select Hospital System: Bronson Methodist Hospital
Select Facility: Bronson Methodist Hospital
Select Audit Type: Environment of Care
Select Standard: Fire Safety
Date Range: 3/1/2000 to 3/1/2006

Select the hospital system from the **Select Hospital System** field.

Select the facility from the **Select Facility** field.

Select the audit type from the **Select Audit Type** field.

Select the standard from the **Select Standard** field.

Enter the date range in the **Date Range** fields. Click on **Go**.

The screen refreshes; a bar graph displays, showing the number of deficiencies associated with the standard per area within the selected date range.

In the example, 25 Fire Safety deficiencies were noted on 1 East during Environment of Care audits conducted at Bronson Methodist Hospital between 3/1/2000 and 3/1/2006.

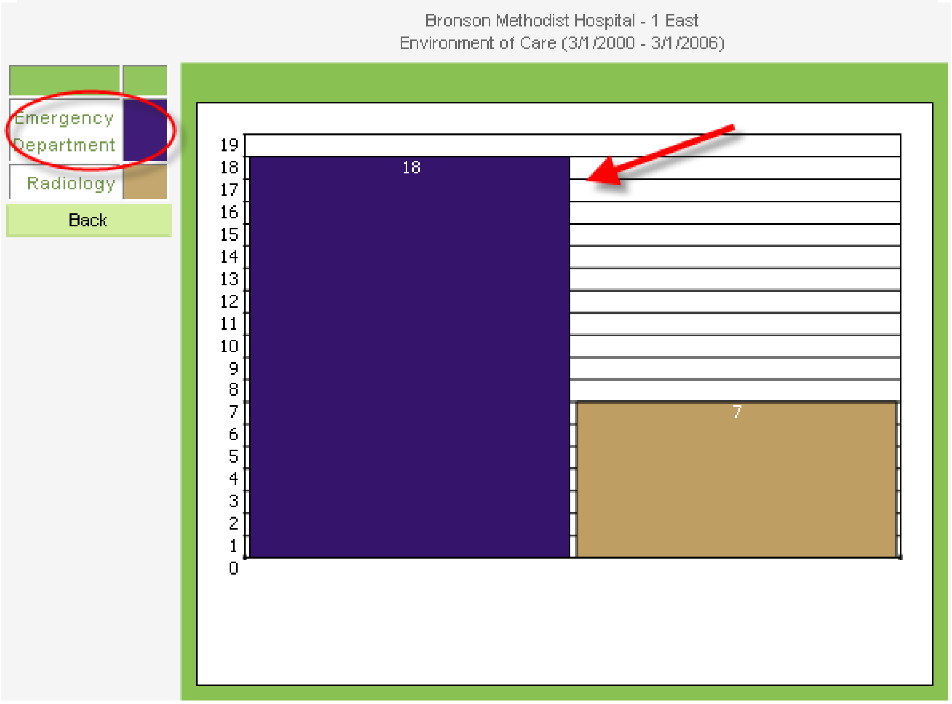
Click on an area in the left-hand column to identify where the deficiencies were noted (in the example, "1 East").

Bronson Methodist Hospital
Environment of Care (3/1/2000 - 3/1/2006)

The screen refreshes; a new bar graph displays, showing the number of deficiencies in the selected department during the specified date range.

In the example, 18 Fire Safety deficiencies were noted in the Emergency Room on 1 East, Bronson Methodist Hospital, during Environment of Care audits conducted between 3/1/2000-3/1/2006.

Click on a facility area in the left column to identify the deficiencies (in the example, “Emergency Department”).

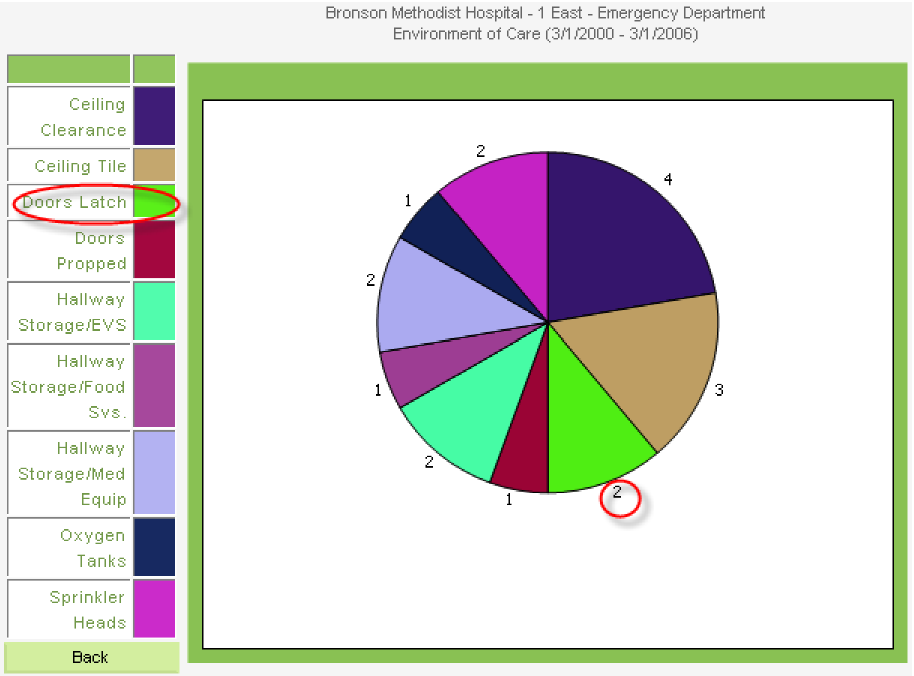


Bronson Methodist Hospital - 1 East
Environment of Care (3/1/2000 - 3/1/2006)

The screen refreshes. A pie chart displays all the deficiencies documented under the standard.

In the example, the pie chart shows the elements that comprise fire safety, and the instances of each deficiency noted during audits conducted within the selected date range. (Two instances of “Doors Latch” issues were noted in the Emergency Department on 1 East, Bronson Methodist Hospital, during Environment of Care audits conducted between 3/1/2000-3/1/2006.)

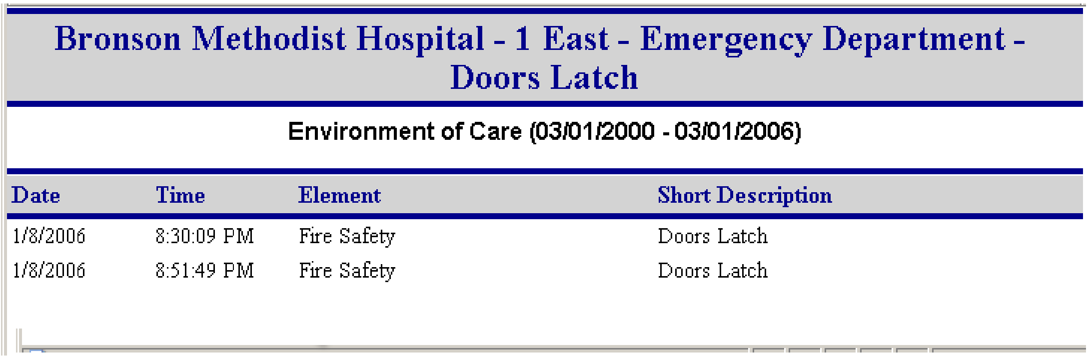
Click on the deficiency in the left-hand table to identify when each deficiency was noted.



Bronson Methodist Hospital - 1 East - Emergency Department
Environment of Care (3/1/2000 - 3/1/2006)

Ceiling Clearance	■
Ceiling Tile	■
Doors Latch	■
Doors Propped	■
Hallway Storage/EVS	■
Hallway Storage/Food Svs.	■
Hallway Storage/Med Equip	■
Oxygen Tanks	■
Sprinkler Heads	■

The screen refreshes. A Word file displays, showing the date and time when each instance of the deficiency was noted.



Bronson Methodist Hospital - 1 East - Emergency Department - Doors Latch

Environment of Care (03/01/2000 - 03/01/2006)

Date	Time	Element	Short Description
1/8/2006	8:30:09 PM	Fire Safety	Doors Latch
1/8/2006	8:51:49 PM	Fire Safety	Doors Latch

DEFICIENCY REPORT

The **Deficiency Report** shows the most frequently reported deficiencies in the facility (for example, the “top five”) within a selected date range, and ranks them in descending order of frequency.

To generate a Deficiency Report:

Select **Deficiency** from the **reports** tab drop-down menu.

When the **Report Deficiency** screen opens:

Select a hospital system from the **Select Hospital System** field.

Select an audit type from the **Select Audit Type** field.

Report Deficiency

Select Hospital System: Bronson Methodist Hospital

Select Audit Type: Environment of Care

Date Range: 3/1/2000 to 3/1/2006

Number of Deficiencies: 5

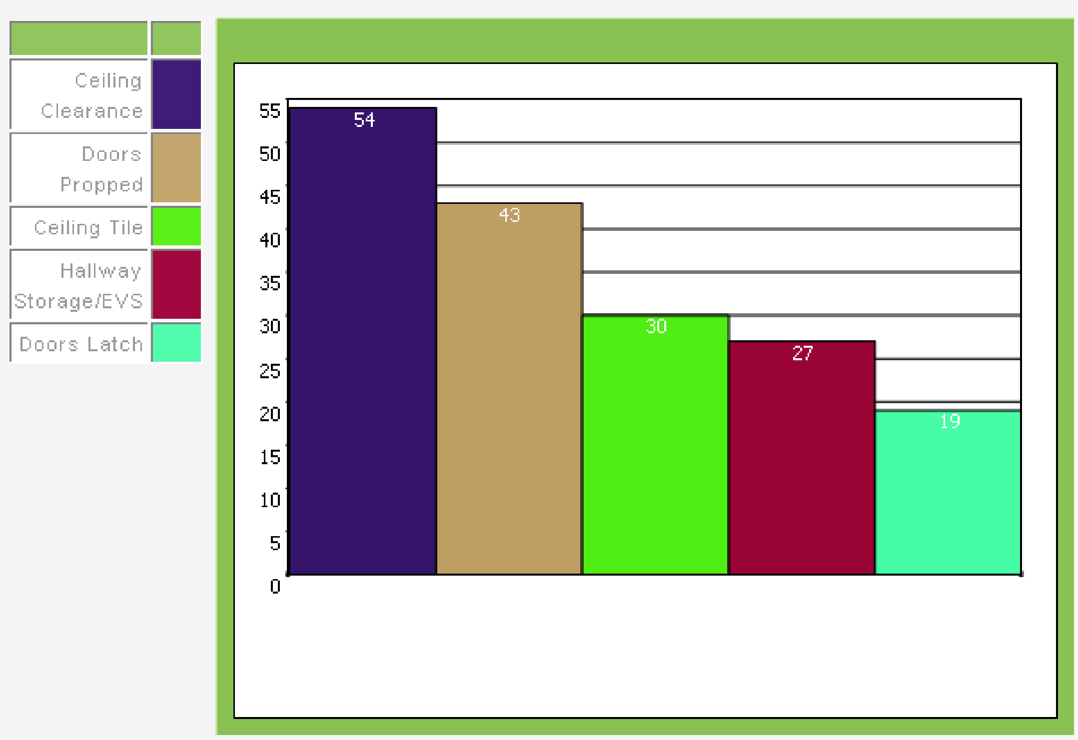
Enter a date range in the **Date Range** fields.

Enter the number of deficiencies to rank in the **Number of Deficiencies** field.

Click on **Go**.

The screen refreshes; a report displays, in a bar graph that ranks the deficiencies in descending order from most frequent to least.

In the example, the five most frequently found deficiencies were Ceiling Clearance (54), Doors Propped (43), Ceiling Tile (30), Hallway Storage/EVS (27), and Doors Latch (19).



DEPARTMENT REPORT

The **Department Report** shows the departments with the most deficiencies within a specified date range. This report is useful in discovering the five (or two or ten) departments in the facility with the most deficiencies within a select audit type.

The Department Report is a drill-down report that lets you extract more information, such as the kinds of deficiencies and the number of times each one occurred.

To generate a Department Report, select **Department** from the **reports** drop-down menu.

When the **Report Department** screen opens:

Select the hospital system from the **Hospital System** field.

Select the hospital from the **Hospital** field.

Select the audit type from the **Audit Type** field.

Enter a date range in the **Date Range** fields.

Enter a number in the **Number of Departments** field. Click on **Go**.

Report Department

Select Hospital System:

Select Audit Type:

Date Range: 3/1/2000 to 3/1/2006

Number of Departments: 5

The screen refreshes and a report displays as a bar graph.

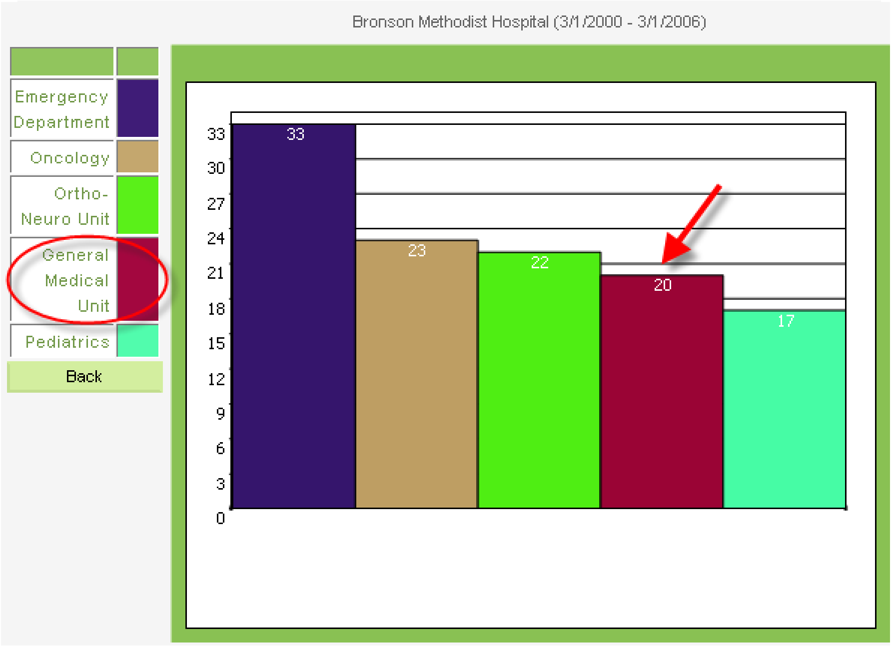
The title shows the facility name and date range.

The y axis shows the number of deficiencies.

The x axis shows the departments. The bars are color-coded to the list of departments located to the left of the bar graph.

In the example, the five departments of Bronson Methodist Hospital with the highest number of deficiencies between 3/1/2000 and 3/1/2006 were (in descending order) the Emergency Department (33), Oncology (23), Ortho-Neuro Unit (22), General Medical Unit (20), and Pediatrics (17).

Click on a department in the left-hand column to identify the deficiencies in a department (in the example, the "General Medical Unit").

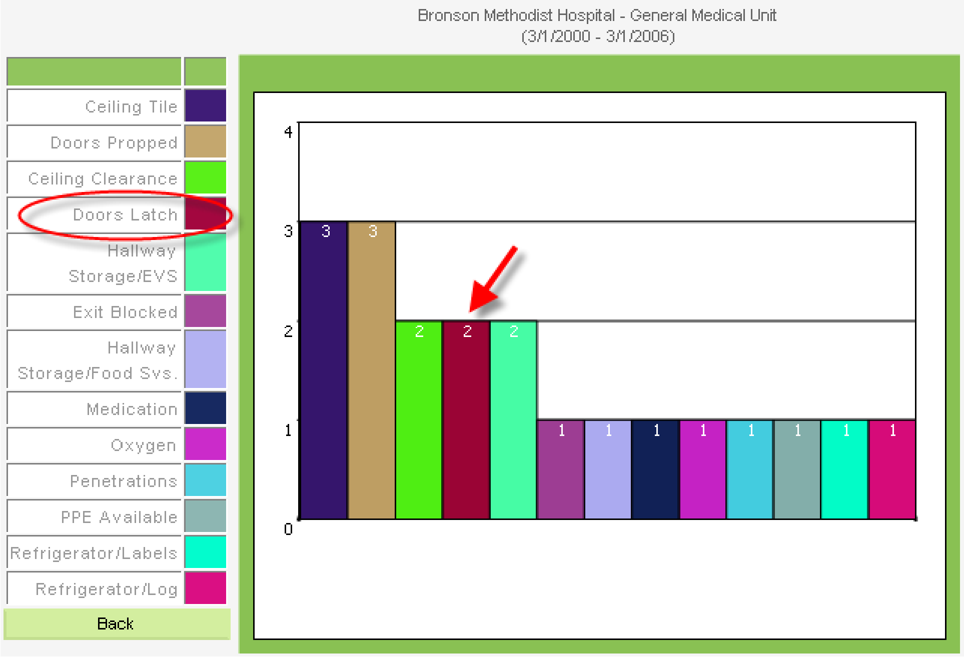


Bronson Methodist Hospital (3/1/2000 - 3/1/2006)

The page refreshes; a new bar graph displays each type of deficiency and the number of times it occurred.

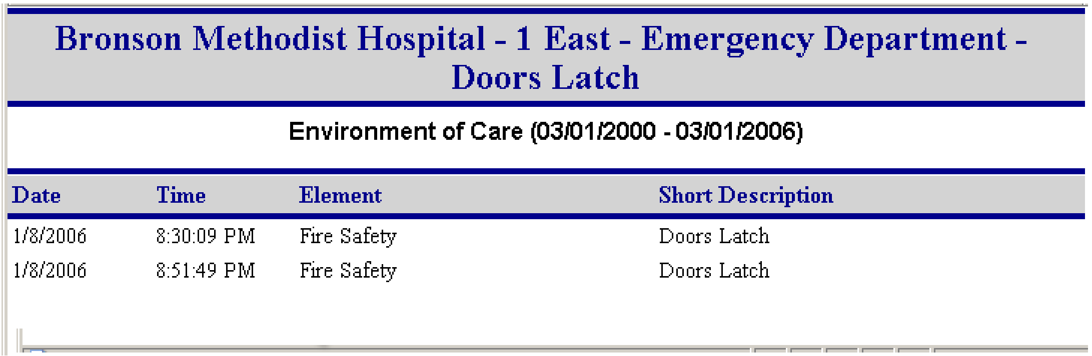
In the example, two “Doors Latch” incidents were observed in the General Medical Unit of Bronson Methodist Hospital between 3/1/2000 and 3/1/2006.

Click on a deficiency in the left-hand column to obtain more information (in the example, “Doors Latch”).



Bronson Methodist Hospital - General Medical Unit
(3/1/2000 - 3/1/2006)

The screen refreshes. A Word file displays, showing the date and time when each instance of the deficiency was noted.



Bronson Methodist Hospital - 1 East - Emergency Department - Doors Latch

Environment of Care (03/01/2000 - 03/01/2006)

Date	Time	Element	Short Description
1/8/2006	8:30:09 PM	Fire Safety	Doors Latch
1/8/2006	8:51:49 PM	Fire Safety	Doors Latch

TALLY POINTS REPORT

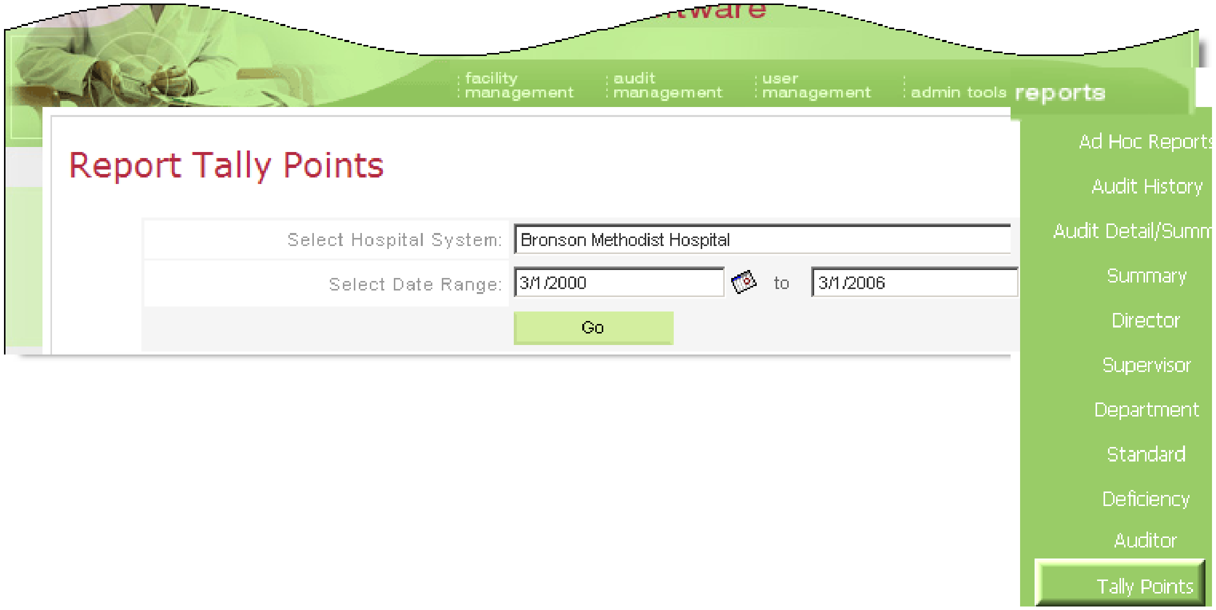
To generate a **Tally Points Report**, also referred to as a “Performance Report,” select **Tally Points** from the **reports** tab drop-down menu.

When the **Report Tally Points** screen displays:

Select a hospital system from the **Select Hospital System** field.

Enter a date range in the **Select Date Range** fields.

Click on **Go**.



Report Tally Points

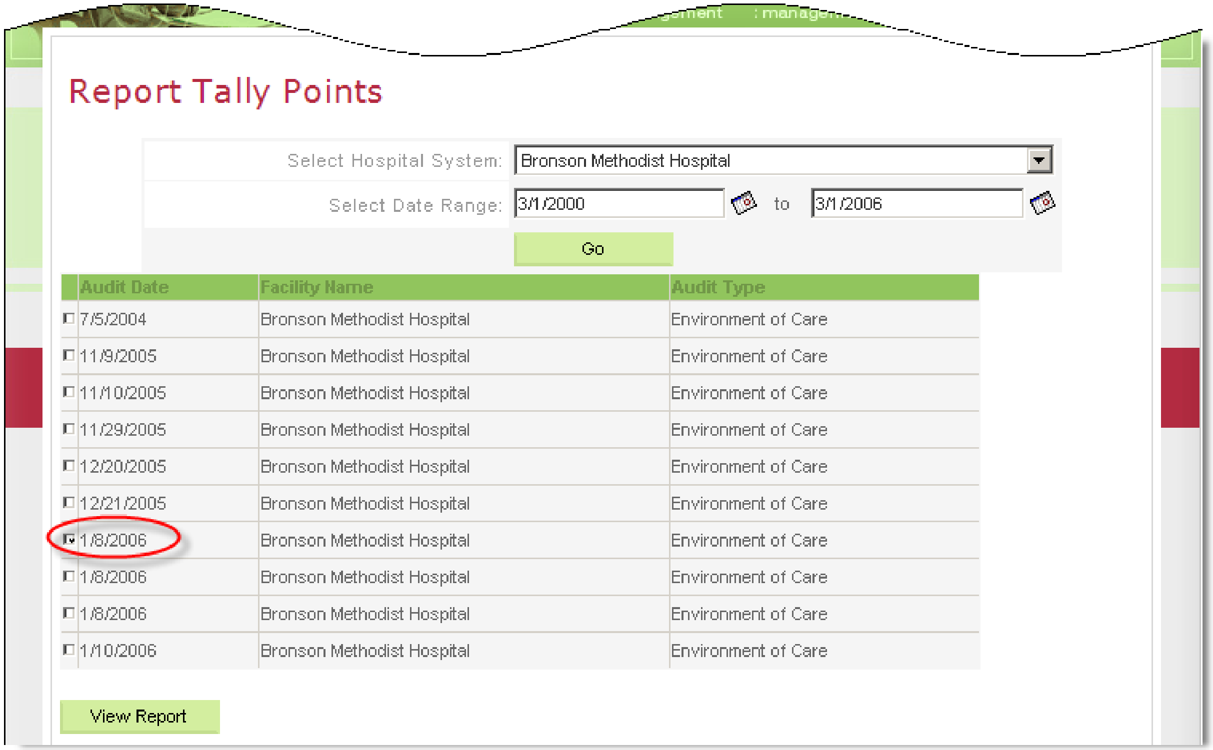
Select Hospital System: Bronson Methodist Hospital

Select Date Range: 3/1/2000 to 3/1/2006

The screen refreshes; the **Report Tally Points** screen displays a table of audits conducted within the selected date range.

Click in the check box next to the audit date you want to review (in the example, “1/8/2006”).

Click on **View Report**.



Report Tally Points

Select Hospital System: Bronson Methodist Hospital

Select Date Range: 3/1/2000 to 3/1/2006

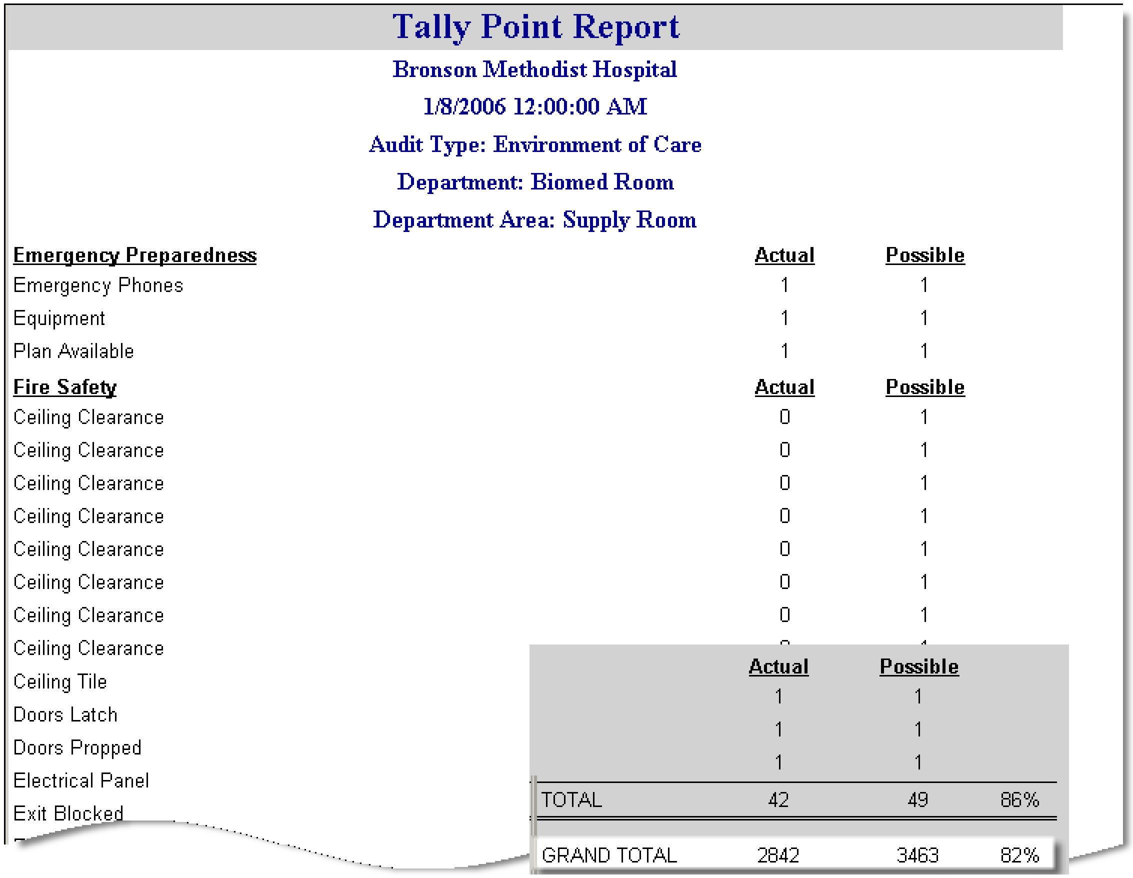
Audit Date	Facility Name	Audit Type
☐ 7/5/2004	Bronson Methodist Hospital	Environment of Care
☐ 11/9/2005	Bronson Methodist Hospital	Environment of Care
☐ 11/10/2005	Bronson Methodist Hospital	Environment of Care
☐ 11/29/2005	Bronson Methodist Hospital	Environment of Care
☐ 12/20/2005	Bronson Methodist Hospital	Environment of Care
☐ 12/21/2005	Bronson Methodist Hospital	Environment of Care
☑ 1/8/2006	Bronson Methodist Hospital	Environment of Care
☐ 1/8/2006	Bronson Methodist Hospital	Environment of Care
☐ 1/8/2006	Bronson Methodist Hospital	Environment of Care
☐ 1/10/2006	Bronson Methodist Hospital	Environment of Care

The screen refreshes; the Tally Point Report opens as a Word document.

Each instance of a deficiency is listed, along with actual points and possible points for every department and department area.

A total number of points is shown for each department area and the percentage of compliance is indicated.

A grand total of points is shown at the end of the report. The percentage of compliance is indicated (In the example, the shading has been added.).



Tally Point Report

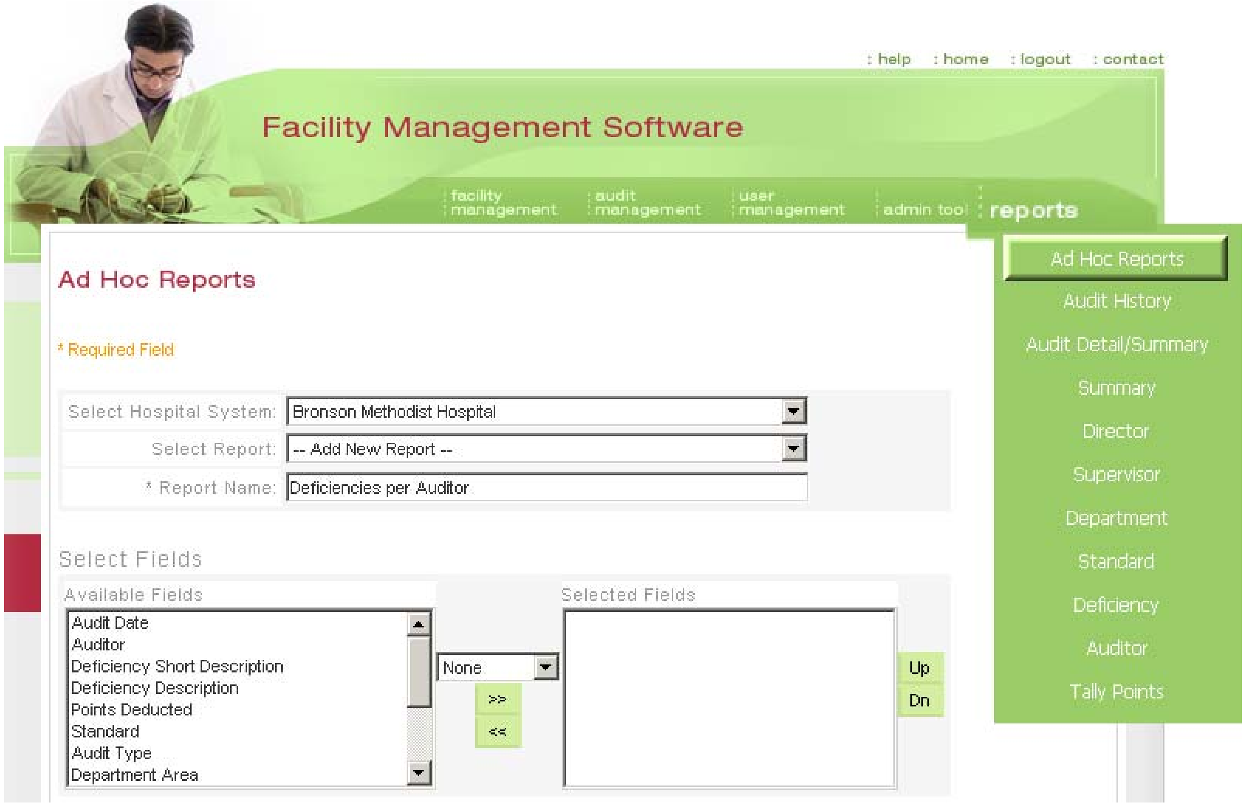
Bronson Methodist Hospital
1/8/2006 12:00:00 AM
Audit Type: Environment of Care
Department: Biomed Room
Department Area: Supply Room

Emergency Preparedness	**Actual**	**Possible**
Emergency Phones	1	1
Equipment	1	1
Plan Available	1	1
Fire Safety	**Actual**	**Possible**
Ceiling Clearance	0	1
Ceiling Clearance	0	1
Ceiling Clearance	0	1
Ceiling Clearance	0	1
Ceiling Clearance	0	1
Ceiling Clearance	0	1
Ceiling Clearance	0	1
Ceiling Clearance		
Ceiling Tile		
Doors Latch		
Doors Propped		
Electrical Panel		
Exit Blocked		

	Actual	**Possible**	
	1	1	
	1	1	
	1	1	
TOTAL	42	49	86%
GRAND TOTAL	2842	3463	82%

Preparing an Ad Hoc Report

Ad hoc reports have greater power and flexibility than static reports. Ad hoc reports allow you to select a number of variables in order to refine a search or to generate a single report that covers an entire facility.



Ad Hoc Reports

* Required Field

Select Hospital System: Bronson Methodist Hospital

Select Report: -- Add New Report --

* Report Name: Deficiencies per Auditor

Select Fields

Available Fields: Audit Date, Auditor, Deficiency Short Description, Deficiency Description, Points Deducted, Standard, Audit Type, Department Area

None

Selected Fields

MANEUVERING THE FIELDS

To generate a basic ad hoc report:

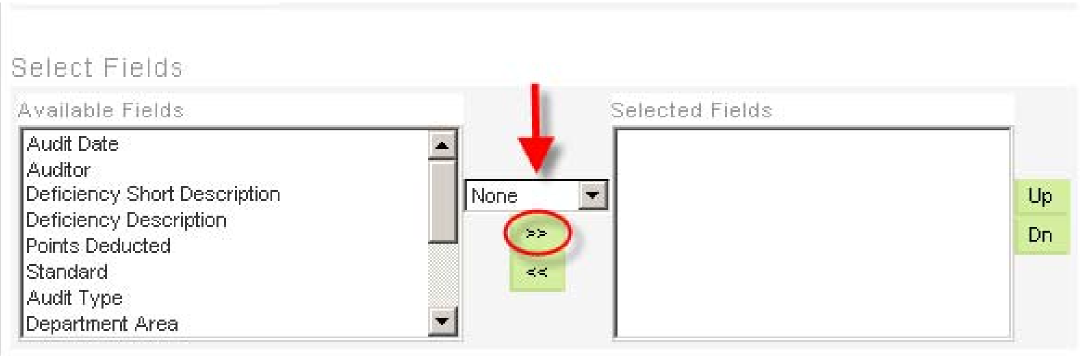
Select **Ad Hoc Reports** from the **reports** tab drop-down menu.

When the **Ad Hoc Reports** screen displays:

Select the hospital system from the **Select Hospital System** field.

Select a report by clicking on **Add New Report** in the **Select Report** field or enter a report name in the **Report Name** field (In the example, “Deficiencies per Auditor” will report the kinds of deficiencies each auditor in the hospital is tracking.).

Go to the **Select Fields** section of the screen. Determine the variables you want to select, based on the information you are looking for.



Leave the function box above the green arrows (**>>, <<**) at the default setting, **None**. (Other setting options are **Count** and **Sum**. In the example, the information desired is neither a total nor a break-down of numbers, but simply the identity of the auditors and the types of deficiencies that each auditor has recorded.)

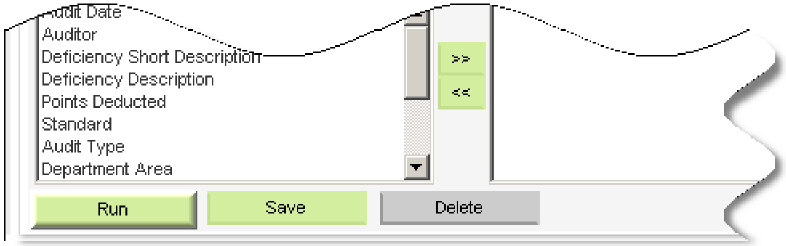
In the **Available Fields** box, select “Auditor”.

Click on the right-pointing green arrows (**>>**) to move “Auditor” to the **Selected Fields** box.

In the **Available Fields** box, select “Deficiency Short Description”.

Click on the right-pointing green arrows (**>>**) to move “Deficiency Short Description” to the **Selected Fields** box.

Skip the remaining fields on the page, and scroll down to the bottom of the screen. Click on **Run**.



The report that displays names two auditors, John Doe and Lisa Hardesty, and names the deficiencies that each of them recorded.

Auditors

John Doe	PPE Available
John Doe	Pull Stations/Extinguishers
John Doe	Refrigerator/Clean
John Doe	Refrigerator/Labels
John Doe	Refrigerator/Log
John Doe	Storage/Floor
John Doe	Storage/Sink
John Doe	Waste Segregation
Lisa Hardesty	Emergency Phones
Lisa Hardesty	Hallway Storage/EVS
Lisa Hardesty	Hallway Storage/Food Svs.
Lisa Hardesty	Hallway Storage/Med Equip
Lisa Hardesty	Linen Covered
Lisa Hardesty	Medication

To run a report that *counts* the deficiencies that the auditors found, first clear the fields on the **Ad Hoc Reports** screen.

In the **Select Fields** section of the screen, make sure that the default, **None,** is selected in the small function box between **Available Fields** and **Selected Fields** (The goal is to identify, not count, the auditors.).

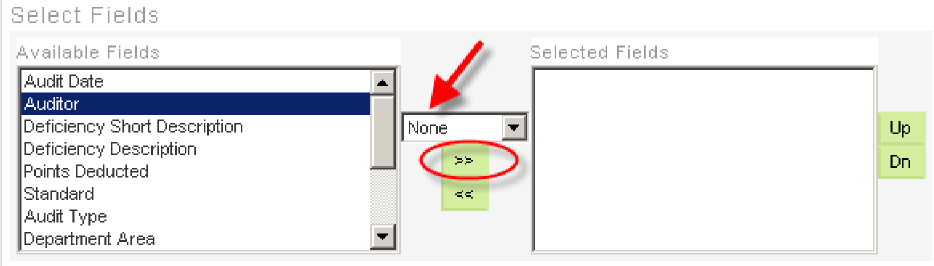
Select "Auditor" from the list of **Available Fields** on the left.

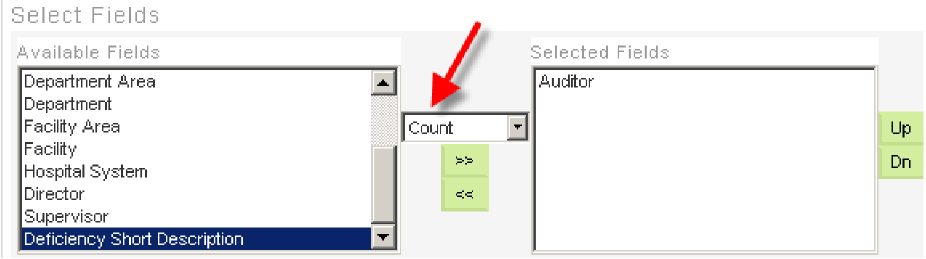
Click on the right-pointing green arrows (**>>**) to move "Auditor" to the **Selected Fields** box.

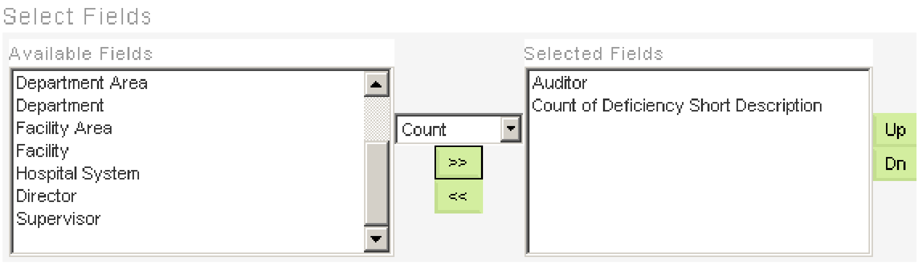
Now select "Count" in the function box between the two fields.

Select "Deficiency Short Description" from the list of **Available Fields** on the left.

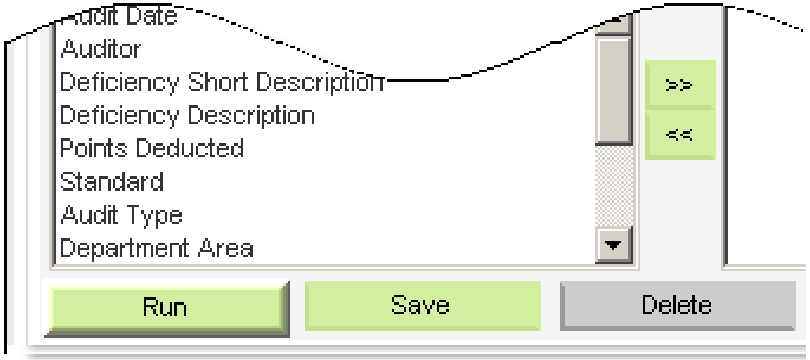
Click on the right-pointing green arrows (**>>**) to move "Count of Deficiency Short Description**"** to the **Selected Fields** box.



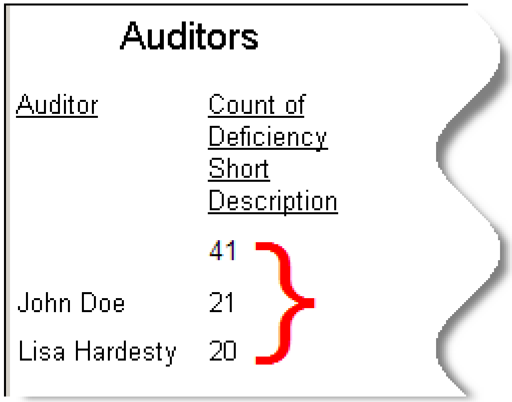




Scroll to the bottom of the screen and click on **Run**.



The new report that displays shows the **Total Number of Deficiencies** observed (41) and the **Number of Deficiencies** each **Auditor** recorded. John Doe recorded 21 deficiencies; Lisa Hardesty recorded 20.



Auditors

Auditor	Count of Deficiency Short Description
	41
John Doe	21
Lisa Hardesty	20

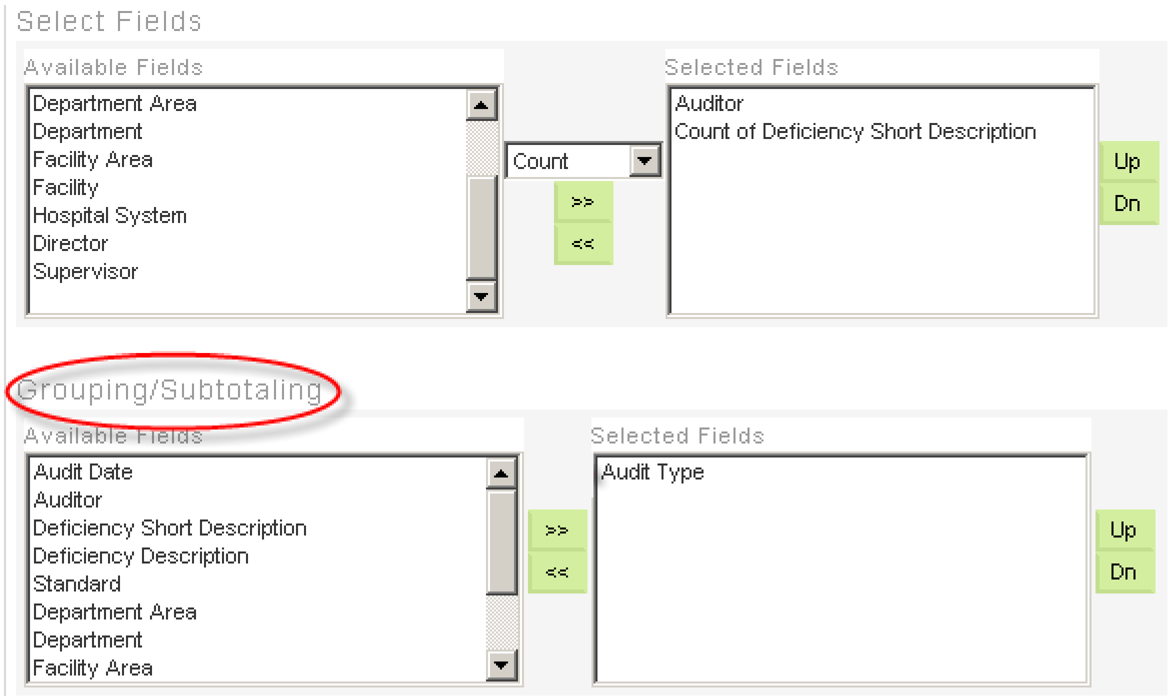
GROUPING

Grouping divides data into meaningful chunks. As an example, let's say you want to look at the findings of the auditors within a particular audit type.

In the **Select Fields** section, select "Auditor" and "Count of Deficiency Short Description", as above. (Make sure that "None" is selected in the function box before you choose "Auditor" from the **Available Fields**; then make sure that "Count" is selected in the function box before you choose "Deficiency Short Description" from the **Available Fields** box.)

Go to the **Grouping/Subtotaling** section of the screen. Select "Audit Type" from the **Available Fields** and click on the right-pointing green arrows to move it to the **Selected Fields** box.

Scroll to the bottom of the page and click on **Run**.



Select Fields

Available Fields
- Department Area
- Department
- Facility Area
- Facility
- Hospital System
- Director
- Supervisor

Count

Selected Fields
- Auditor
- Count of Deficiency Short Description

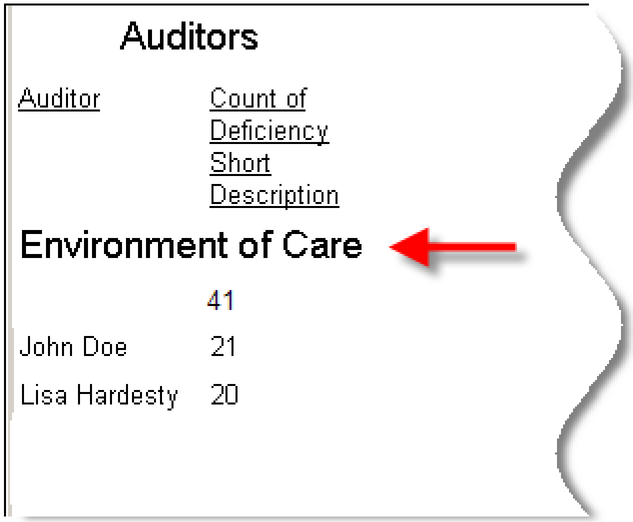
Grouping/Subtotaling

Available Fields
- Audit Date
- Auditor
- Deficiency Short Description
- Deficiency Description
- Standard
- Department Area
- Department
- Facility Area

Selected Fields
- Audit Type

The report generated shows the auditors and gives both a total number of deficiencies and a break-down per auditor by audit type.

In the example, John Doe recorded 21 deficiencies and Lisa Hardesty 20, for a total of 41 deficiencies recorded during Environment of Care audits.



Auditors

Auditor	Count of Deficiency Short Description
Environment of Care	
	41
John Doe	21
Lisa Hardesty	20

EXPORTING AN AD HOC REPORT TO EXCEL

Sometimes, especially when working with many variables, you may want to export a report to work in a spreadsheet application like Microsoft Excel.

In Excel, you can reformat data, as desired. Moreover, you can work with Excel functions to analyze data. For example, you can create pivot tables and pie charts.

To export a file to Excel, from the Explorer tool bar, choose **Select All** in the report web page.

Select **Copy.**

Open Excel and place the cursor in the upper left cell (cell A1).

From the Excel tool bar, select **Paste** from the Edit drop-down menu.

The data can now be manipulated, using Excel’s many powerful functions.

USING THE PDA TO CONDUCT AN AUDIT

Actual PDA models may vary. Consult the user manual for your PDA, as necessary.

The PDA unit comes with a cradle/docking station and a stylus. The camera may be built into the PDA.

PDA

Stylus

Cradle/Docking Station

SYNCHRONIZING THE PDA

Synchronizing the PDA with the computer means enabling the two devices to communicate and keep information up-to-date. You can share files, display updated contacts, appointments, and tasks, and send and receive email messages.

It is recommended that, before performing an audit, you always synchronize the PDA with the facility management database. Synchronize the PDA again before editing or emailing an audit.

To synchronize the PDA:

Insert the PDA into the docking station.

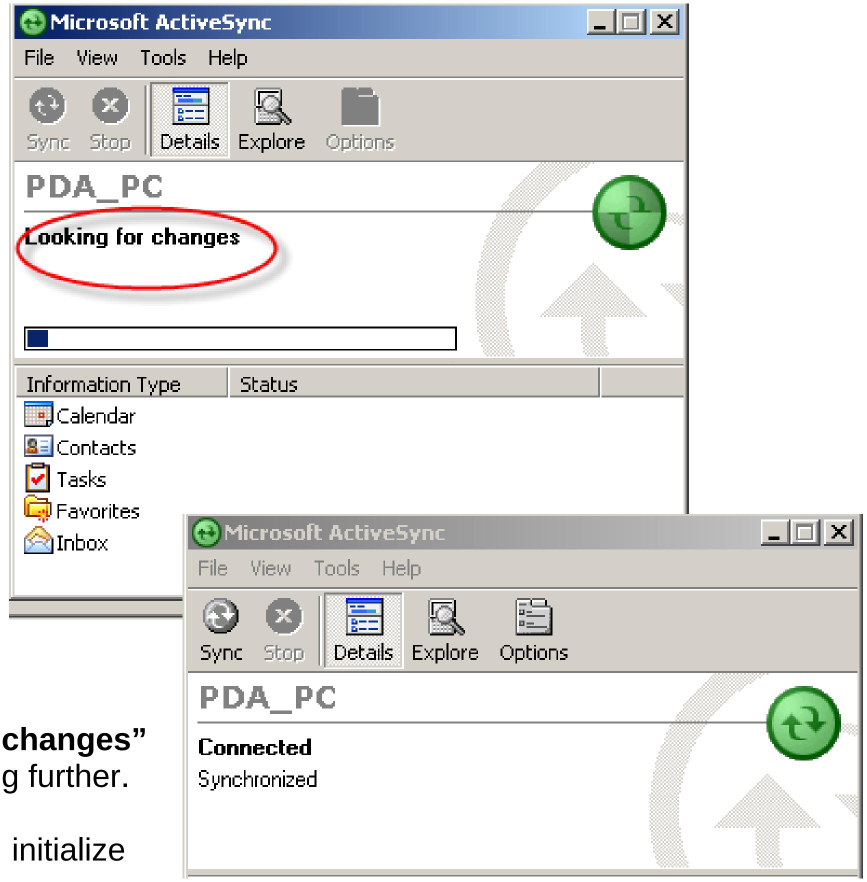
Insert the USB cable into the USB port on the computer.

Turn on the PDA.

Make sure you have an Internet connection.

Microsoft ActiveSync opens automatically and displays a **"Looking for changes"** message. It's important to let this process run to completion before going further.

When ActiveSync displays a message that synchronization is complete, initialize RepliSync on the PDA. Leave the PDA in the docking station.



PDA_PC

Looking for changes

PDA_PC

Connected

Synchronized

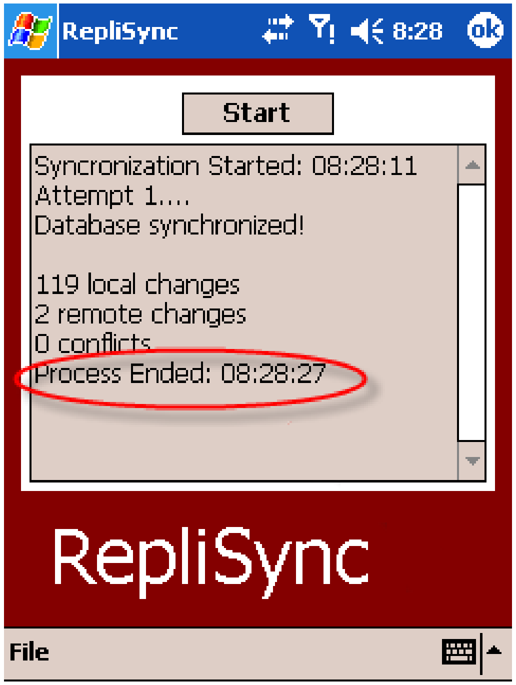
On the PDA, go to **Programs**; tap the RepliSync icon.

When RepliSync opens, tap **Start** to begin synchronization.

During synchronization, all the information gathered by the PDA is transferred to the database. Once the transfer is complete, the data is erased from the PDA and is no longer available from that device. The information is now available only through the Facility Management Software on the computer.

When synchronization is completed, RepliSync will display a **“Synchronized”** message. If the message does not appear, contact your systems administrator.

RepliSync will close automatically.



```
Syncronization Started: 08:28:11
Attempt 1....
Database synchronized!

119 local changes
2 remote changes
0 conflicts
Process Ended: 08:28:27
```

PERFORMING AN AUDIT

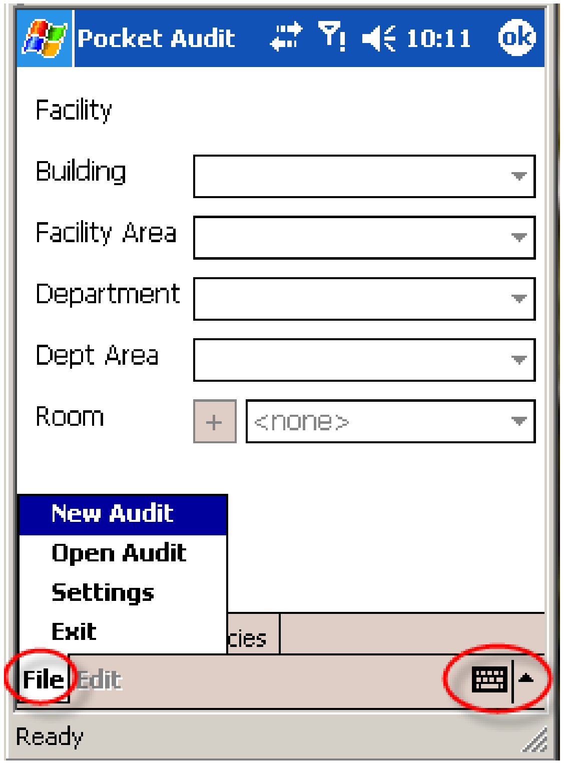
Starting a New Audit

From the Programs menu, open the Pocket Audit application.

Select **File** from the bottom left of the screen (circled in red). From the file pop-up menu, select **New Audit**.

To open and close the keyboard, tap the keyboard icon located at the bottom right of the screen (circled in red). Use the keypad and stylus to enter information and comments. Throughout most of this section, the keyboard will be hidden, as in the "off" position.

Note: Some PDA models have smaller screens. Use the appropriate scroll bars to scroll up, down, right, or left to view all fields on a screen.



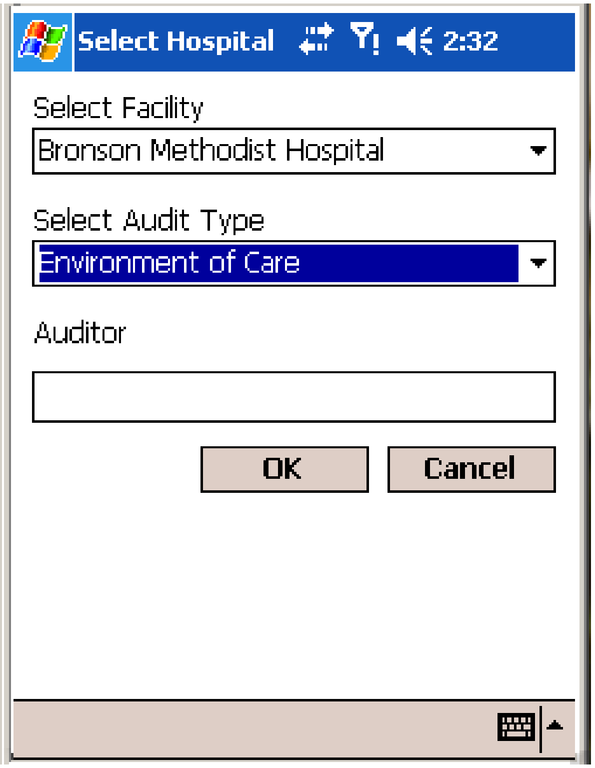
When the **Select Hospital** screen displays, select a facility from the **Select Facility** drop-down menu.

Choose an audit type from the **Select Audit Type** drop-down menu.

Tap in the **Auditor** box and enter your name.

Tap **OK**.

Note: To resume an audit already in progress (e.g., after a lunch break) or to toggle between audit types, select **Open Audit** from the **File** pop-up menu. When the **Open Audit** screen displays, select an audit from the list. Tap **Open**.



Select Facility: Bronson Methodist Hospital

Select Audit Type: Environment of Care

Auditor

When the screen refreshes, the facility selected will appear in the **Facility** field at the top of the **Pocket Audit** screen.

You must enter something in all of the following fields in order to document a deficiency:

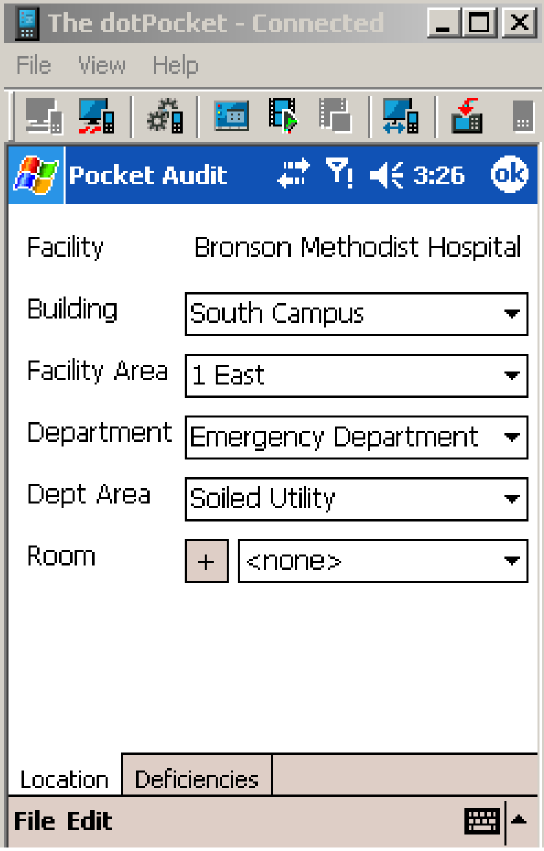
- **Building**
- **Facility Area**
- **Department**
- **Dept Area**

Note: You may need to scroll down to view all the fields.

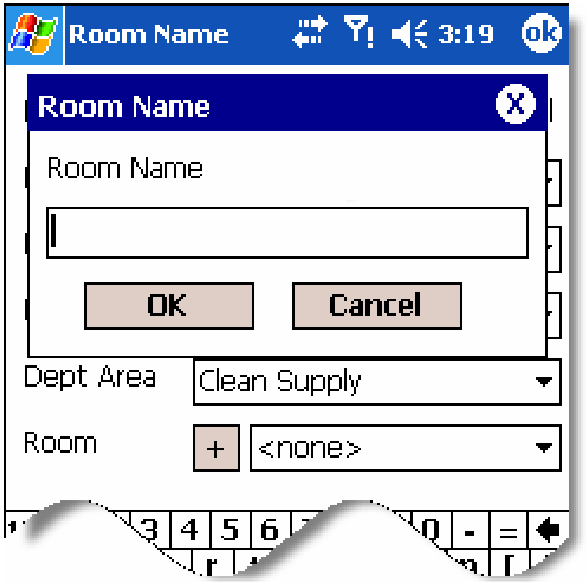
To add a room name (optional), tap the **+** sign next to the **Room** field. A **Room Name** screen opens.

Enter a room identifier (e.g., a name or number) into the Room Name field.

Tap **OK**.



Facility Bronson Methodist Hospital
Building South Campus
Facility Area 1 East
Department Emergency Department
Dept Area Soiled Utility
Room + <none>



Room Name
Dept Area Clean Supply
Room + <none>

Tap the **Deficiencies** tab (circled in red).

The **Deficiencies** screen opens. From this screen, you can record any deficiency found during the audit.

The **Deficiencies** screen features a drop-down menu of **Elements**, the standards or goals that must be met to achieve compliance. In the example, the **Element** is “Fire Safety”; the **Deficiency** is “Exit Blocked”.

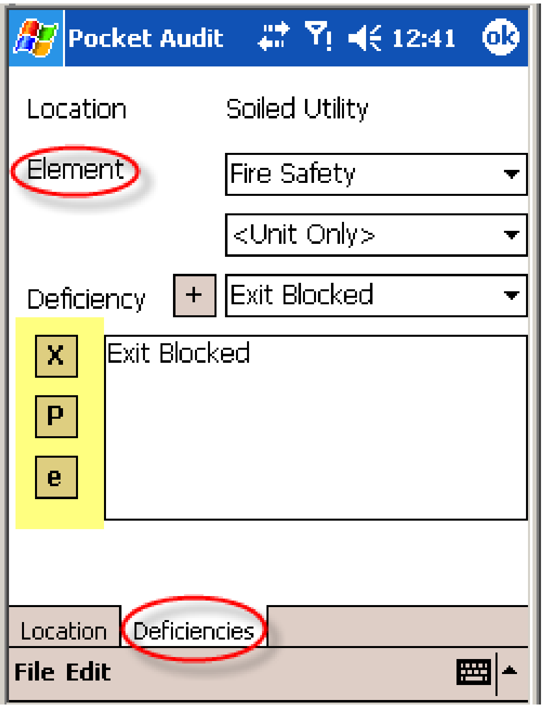
Three icons appear on this screen to the left of a text box (yellow highlighting added). To operate these icons, you must first select a deficiency from the **Deficiency** drop-down menu, then tap the **+** sign. The deficiency will appear in the text box.

Then tap one of the icons, as follows:

x – to remove a deficiency that has been entered.

p – to attach a photo to the deficiency.

e – to view the standard in order to verify compliance with what you observe.



Location Soiled Utility

Element Fire Safety

<Unit Only>

Deficiency Exit Blocked

Exit Blocked

Recording a Deficiency

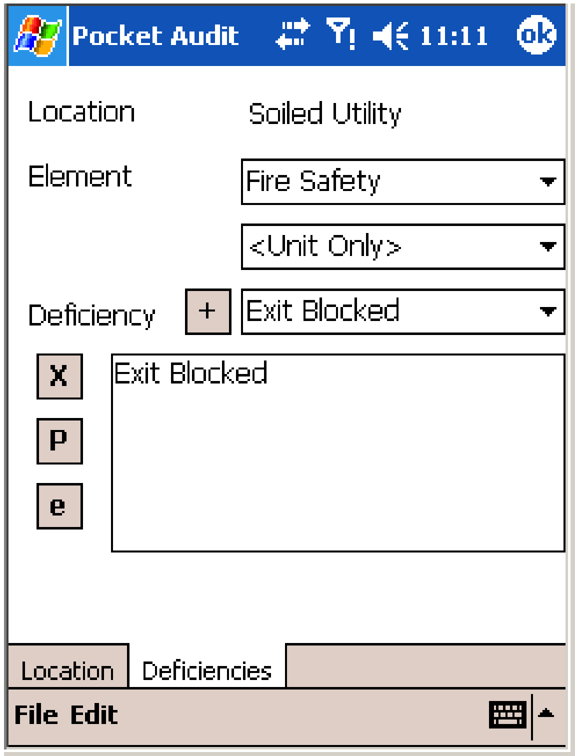
From the **Deficiencies** tab, first select a standard from the **Element** drop-down menu (in the example, “Fire Safety”).

In the next field, select the intended recipients for the email you will send after you complete the audit. The default, “Unit Only”, means that only the unit-level administrators will be included in the email.

Next, select a deficiency from the **Deficiency** drop-down field.

Highlight the deficiency, then tap the **+** sign.

The deficiency appears in the text box.



Location Soiled Utility

Element Fire Safety

<Unit Only>

Deficiency Exit Blocked

Exit Blocked

Adding a Custom Deficiency

If the appropriate deficiency does not appear in the **Deficiency** drop-down field, add a custom deficiency.

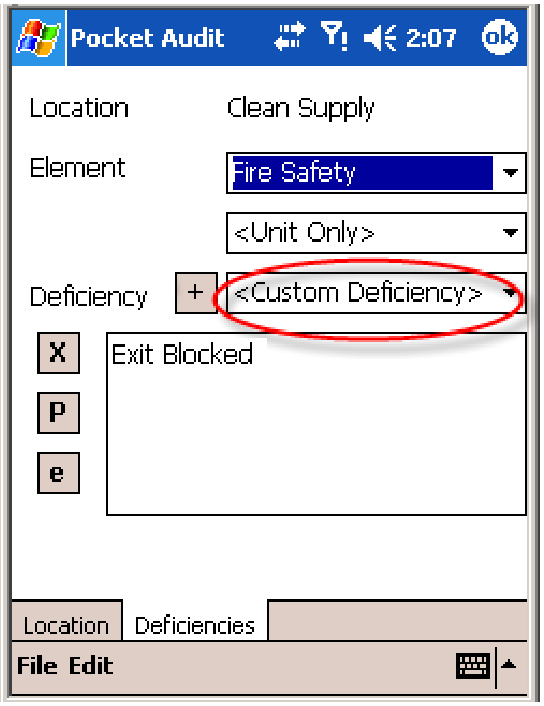
From the **Deficiencies** tab, tap the **+** sign; the **Custom Deficiency** screen opens.

Use the keyboard to make a brief entry in the **Short Description** field.

You must also enter a more complete description in the **Description** field. When you have finished, close the keyboard. The entered text will comprise the body of the email.

Assign a point value of 1 or greater in the **Point Value** field.

Tap **OK**.



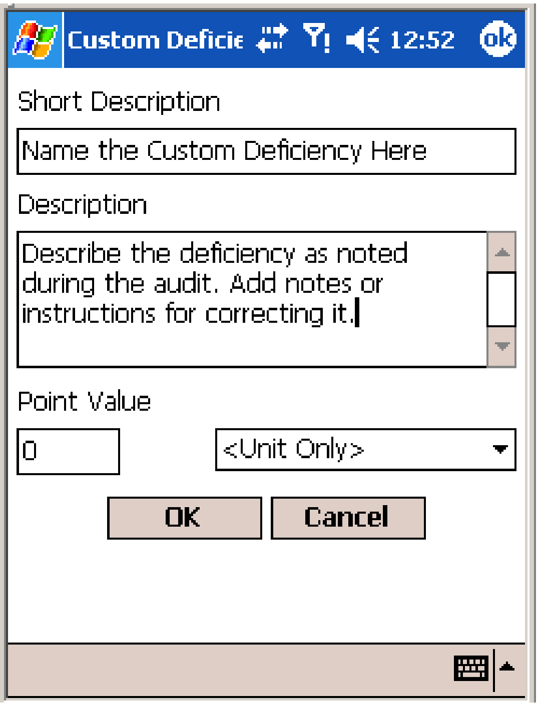
Location Clean Supply

Element Fire Safety

<Unit Only>

Deficiency <Custom Deficiency>

Exit Blocked



Short Description Name the Custom Deficiency Here

Description Describe the deficiency as noted during the audit. Add notes or instructions for correcting it.

Point Value 0 <Unit Only>

Deleting a Deficiency

To delete a deficiency, from the **Deficiencies** screen, highlight the deficiency in the **Short Description** text box.

Tap the **x** icon. The deficiency will be deleted.

Reviewing a Standard

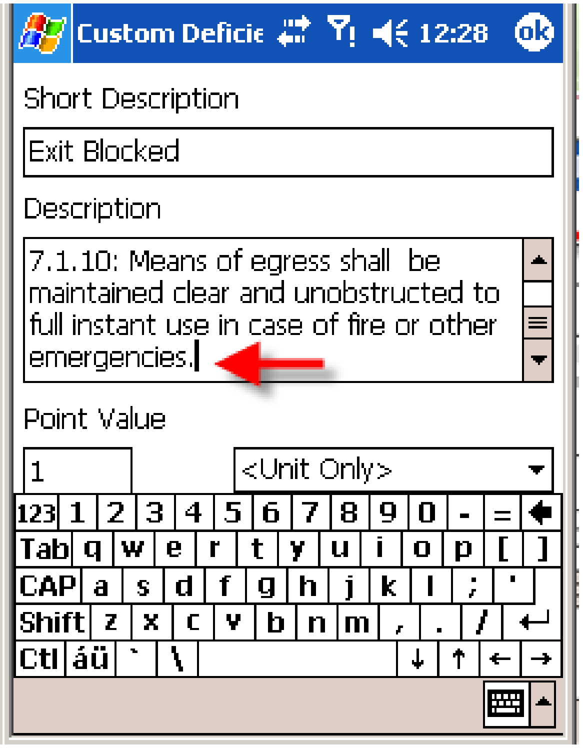
To review or edit (e.g., add notes to) the standard for the deficiency, from the **Deficiencies** screen, highlight the deficiency in the **Short Description** text box. Tap the **e** icon.

A screen opens with the **Short Description** at the top (in the example, “Exit Blocked”) and a **Description** field that displays the standard; these are the conditions that must be met for compliance.

Tap at the end of the text in the **Description** text box to position the cursor (in the example, highlighted by arrow). Open the keyboard, if necessary. Type your comments or notes. Close the keyboard.

Tap **OK** to save.

When the screen closes, you will be returned to the **Deficiencies** screen.



Short Description

Exit Blocked

Description

7.1.10: Means of egress shall be maintained clear and unobstructed to full instant use in case of fire or other emergencies.

Point Value

1

<Unit Only>

Adding a Location

While conducting an audit, you may find an area to inspect that does not appear in the PDA.

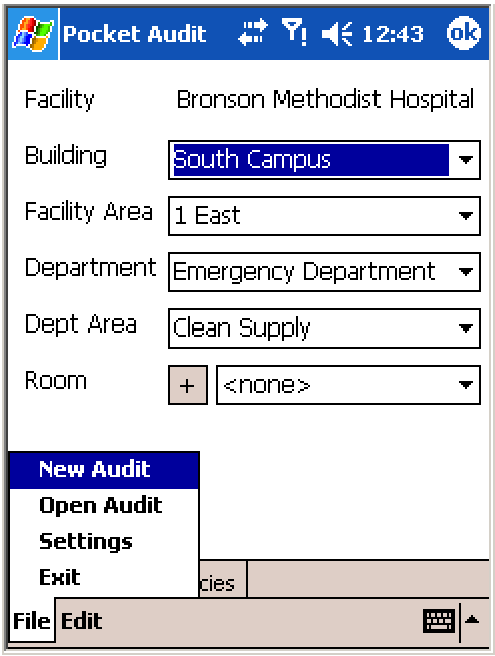
To add a new location to the audit:

Tap the **Edit** tab at the bottom of the **Pocket Audit** screen and select **New Building, Facility, Department,** or **Department Area** from the drop-down menu.

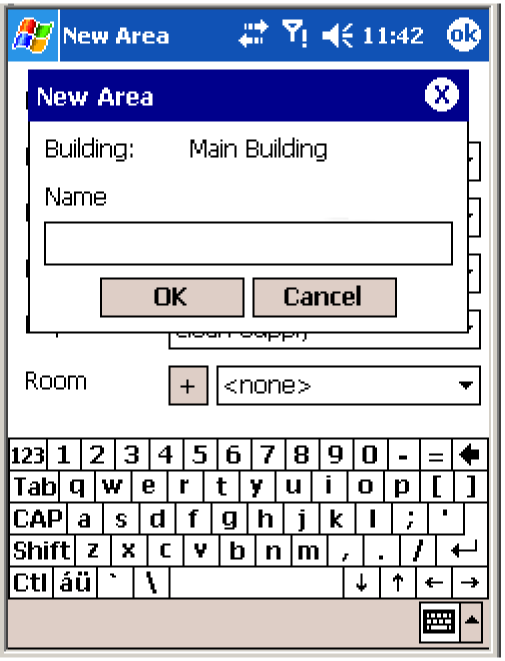
A **New Area** screen opens. Enter a name or number into the **Name** field.

Tap **OK** to close the screen.

Note: After you add a new area, you must go back and select it from the drop-down box to add it to the audit.



Facility Bronson Methodist Hospital
Building South Campus
Facility Area 1 East
Department Emergency Department
Dept Area Clean Supply
Room + <none>



Building: Main Building
Name
Room + <none>

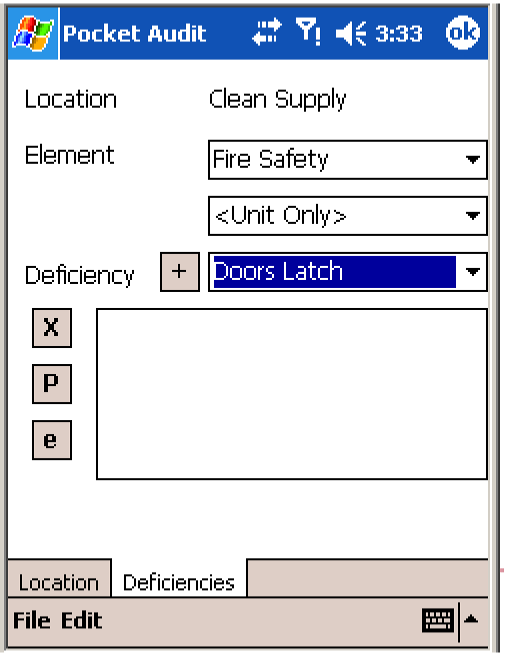
Taking and Attaching a Photo

For detailed instructions on camera setup and adjusting the camera settings, see the section on Setting up the Camera in this User's Manual.

To take a picture during an audit:

From the **Deficiencies** screen, select the **Deficiency**.

Tap the **+** sign.



Location Clean Supply

Element Fire Safety

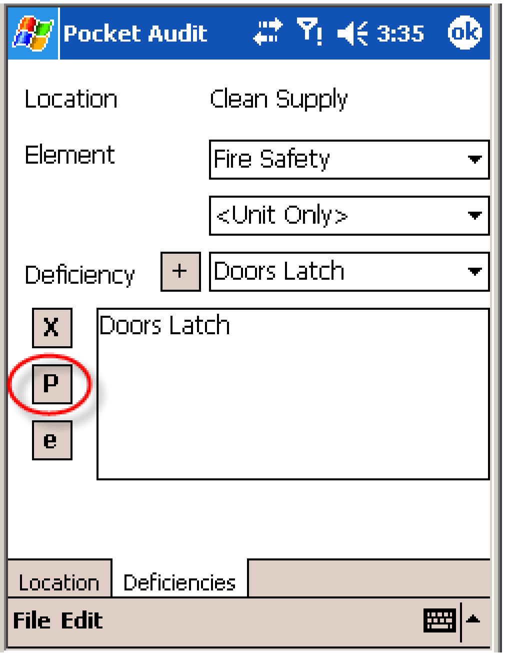
<Unit Only>

Deficiency Doors Latch

The deficiency will appear in the large text box.

Tap the **p** icon (in the example, circled).

With the audit still open on the PDA, open the camera application, as follows.



Location Clean Supply

Element Fire Safety

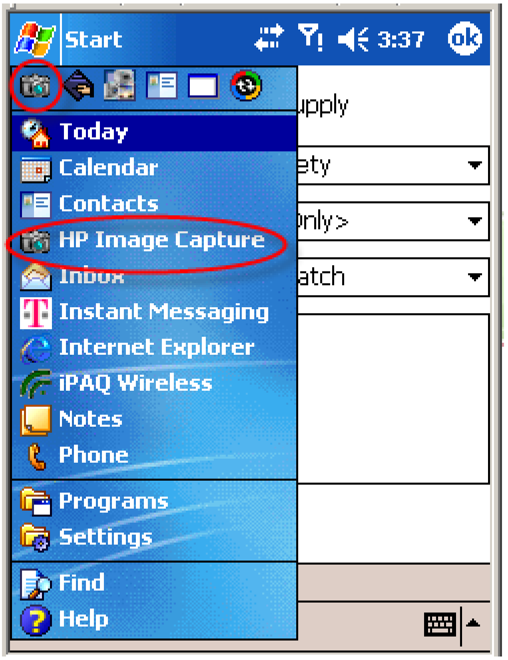
<Unit Only>

Deficiency Doors Latch

Doors Latch

Tap the Microsoft icon at the top of the screen and go to **Start>Programs**.

Tap the camera icon in the menu bar or in the drop-down list.



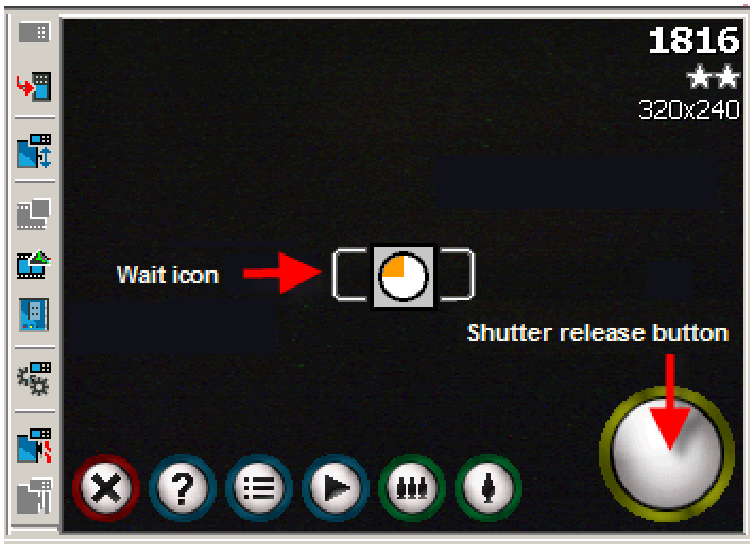
The PDA screen will display as a camera.

Hold the camera in landscape orientation.

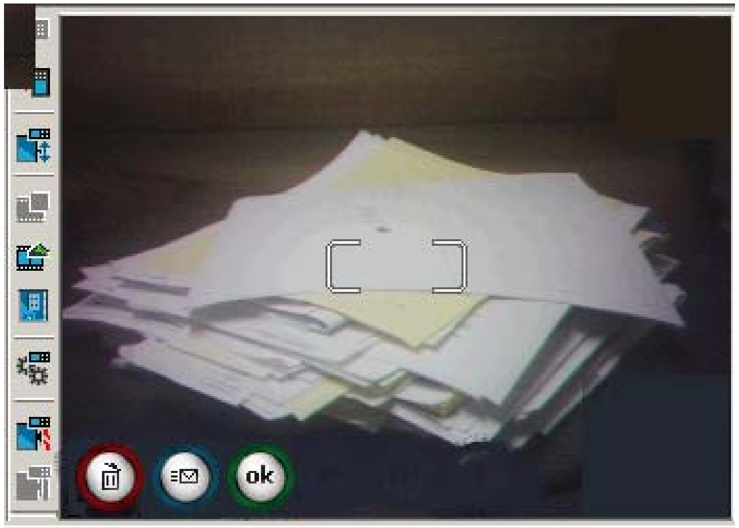
Use the **Viewfinder** to center the image.

Press the **Shutter release button** to capture the image.

A **Wait** icon displays while the camera processes the image.



The captured image will automatically appear on the camera screen for **Instant Review**. Refer to the section [Setting up the Camera](#) in this User's Manual for more information about Instant Review.



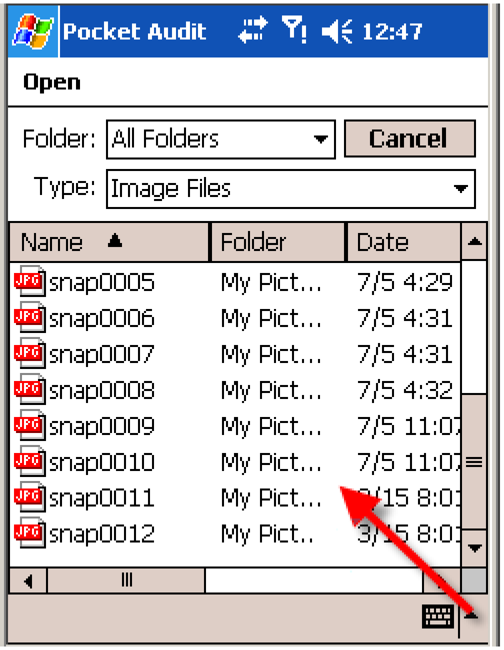
Three icons appear on the screen (shown enlarged): a trash can, an envelope, and an "ok" button.

- If you are satisfied with the image, tap **OK.**
- If you are not satisfied with the image, tap the **trash can** icon.
- To cancel **Instant Review** and continue taking photos, tap anywhere on the screen.
- To attach the photo to the audit, tap the **Envelope** icon.

The image folder will open, listing the available image files. Most of the time, the photo will appear at the bottom of the file list; sometimes it does not. Be sure you select the correct image number.

Tap the file to select it.

Tap the **Close** button (**X**) to close the camera.



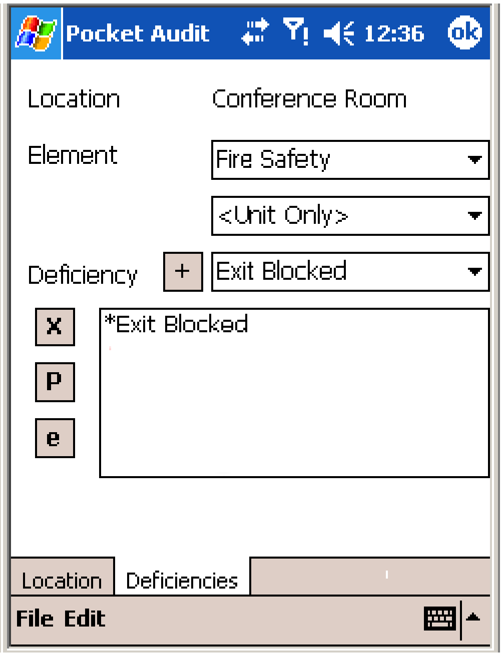
Folder: All Folders

Type: Image Files

Name	Folder	Date
snap0005	My Pict...	7/5 4:29
snap0006	My Pict...	7/5 4:31
snap0007	My Pict...	7/5 4:31
snap0008	My Pict...	7/5 4:32
snap0009	My Pict...	7/5 11:07
snap0010	My Pict...	7/5 11:07
snap0011	My Pict...	3/15 8:01
snap0012	My Pict..	3/15 8:01

You will be returned to the **Deficiencies** screen. The deficiency in the text box will now have an asterisk to the left to indicate that a photo is attached.

Note: Only one image can be attached to a deficiency.



Pocket Audit 12:36

Location: Conference Room

Element: Fire Safety

<Unit Only>

Deficiency: Exit Blocked

*Exit Blocked

Performing Post-Audit Tasks

Following completion of an audit, synchronize the PDA with the computer again. All the audit information gathered will be entered into the database and erased from the PDA.

Review, edit, and email audit findings from the computer by accessing **Manage Audits** from the **audit management** tab on the Facility Management Software. See the section Manage Audits in this User's Manual for complete instructions. The data and photos gathered during the audit automatically populate the audit findings that are issued by email.

Note: Photos must be manually deleted from the PDA. Perform this task, per the instructions in the next section, *after* reviewing the audit findings in the database. This will ensure that all photos are still available for use, should you discover that the wrong photo has been attached to a deficiency.

Deleting a Photo

Go to **Programs** and select the **Camera** icon.

When the camera application opens, tap the **Instant Review** button.

All the photos will display.

Tap the **Close button** (**X**) in the upper right to close **Instant Review**.

The most recent photos will appear, numbered, across the lower region of the screen.

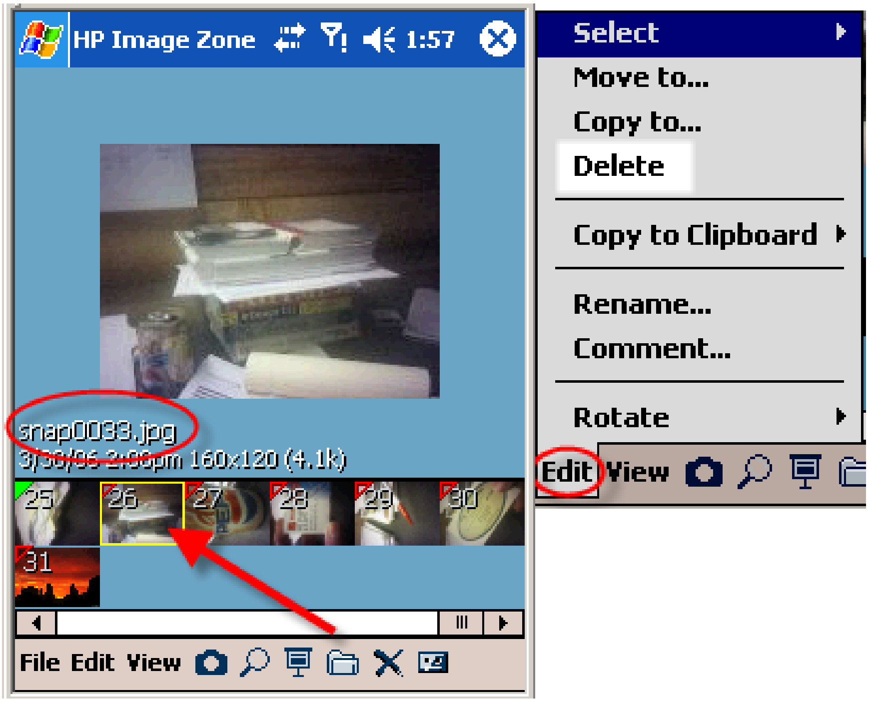
Select the photo to delete (in the example, highlighted by the arrow).

The image, along with the file name, will appear on the screen.

Select **Delete** from the **Edit** menu (or, depending on your camera, tap the **Delete** button).

When the message displays verifying the deletion, tap **Yes**.

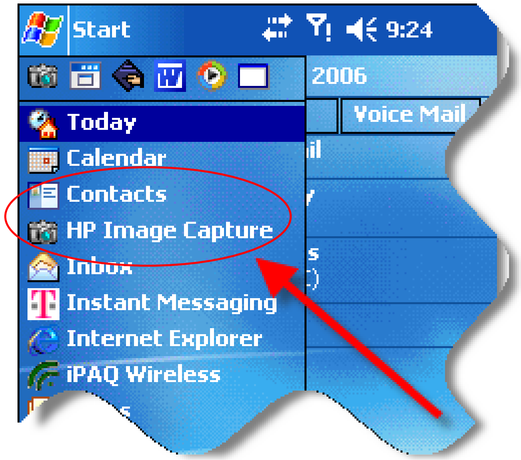
The image will be deleted from both the PDA and the audit.



SETTING UP THE CAMERA

Actual camera models and features may vary. Consult the User's Manual for your camera, as necessary.

This section explains camera features and setup. The steps for taking photos during an audit appear in the Using the PDA to Conduct an Audit section of this User's Manual.



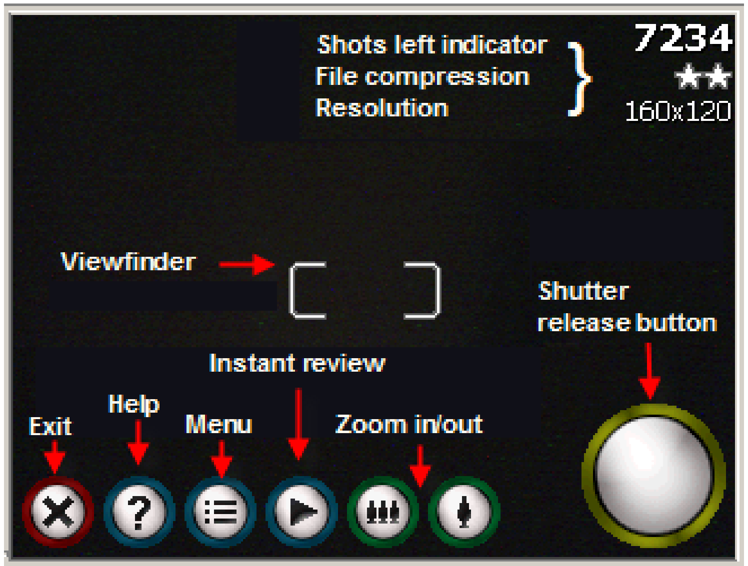
LAUNCHING THE CAMERA APPLICATION

Tap **Start>Programs** on the PDA.

Tap on the camera icon in the menu bar.

Alternatively, launch the application by pressing a hardware application button that has been mapped to the camera application.

The PDA screen displays as a camera



In the upper right are the **Shots left indicator** (in the example, shown as “7234”), which is the number of shots that can be taken based on resolution, compression, storage space, and the complexity of the image, the **File compression setting** (represented by stars), and the **Resolution setting** (“160x120”).

A **Viewfinder** appears in the center of the screen

A **Camera controls** panel displays across the bottom.

EXITING THE CAMERA APPLICATION

In portrait mode, tap **File>Exit**.
In landscape mode, tap the **Close (X)** button on the **Camera controls** panel.

ADJUSTING THE CAMERA SETTINGS

Tap the **Menu** icon on the control panel. From here you can select the **Settings** or **Setup** tabs to adjust the camera.

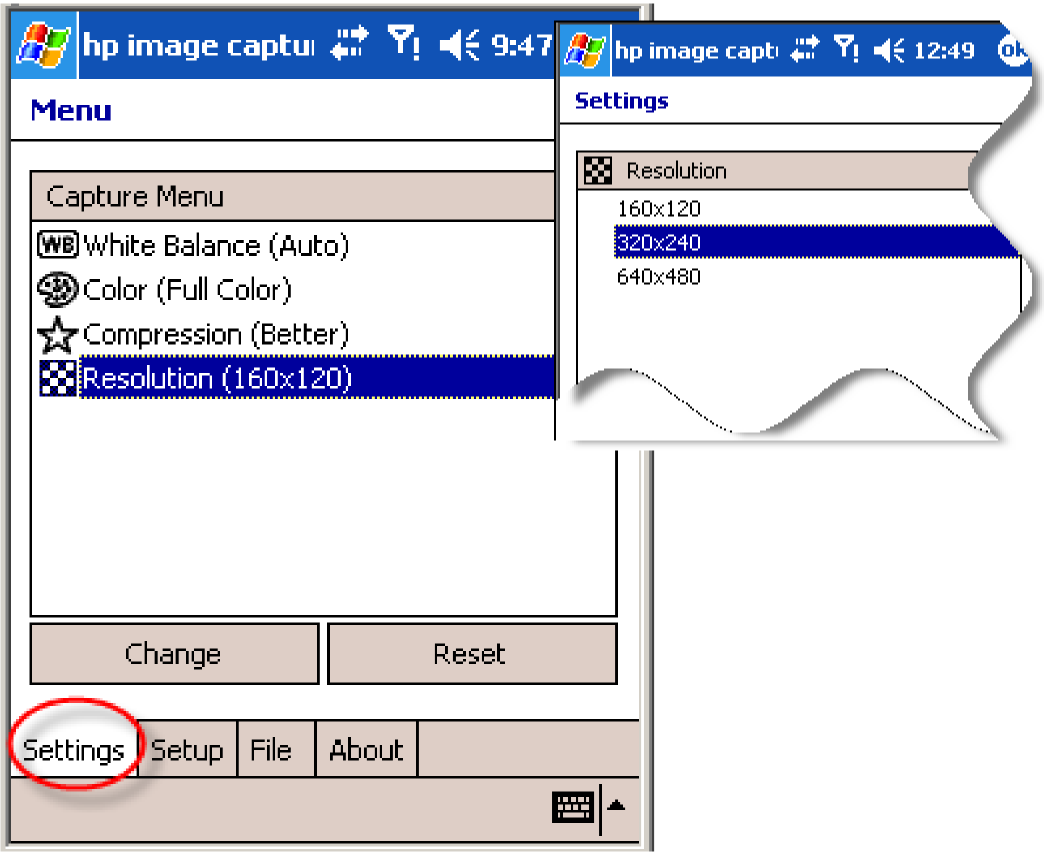
Settings Tab

Several camera settings can be adjusted under the **Settings** tab; only the resolution setting is important for the purposes of emailing an image as part of an audit.

To change any setting, select the setting from the **Settings** tab.

Tap the **Change** button or double-tap on the setting in the list. When the **Settings** screen opens, highlight your new setting preference. Tap **OK** at the top right of the screen to close the screen.

Tapping the **Reset** button will reset all settings to the default.



Capture Menu
White Balance (Auto)
Color (Full Color)
Compression (Better)
Resolution (160x120)

Resolution
160x120
320x240
640x480

RESOLUTION

The resolution setting selects the width by height in pixels of the captured image. The default resolution setting is 160 x 120; for best results, set the resolution to 320 x 240.

EXPOSURE MODE

The exposure mode setting adjusts the F-number and shutter speed.

- Auto mode selects the best F-number and shutter speed.
- Action mode lets you select fast shutter speeds to stop action.

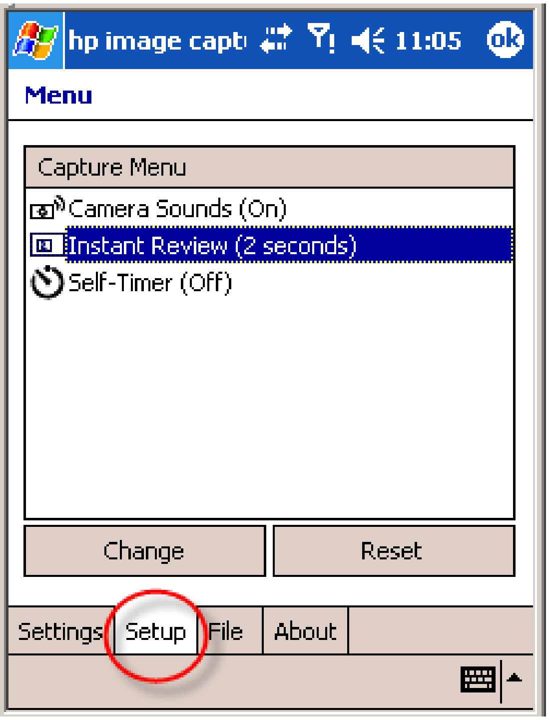
Setup Tab

The **Setup** tab contains settings that are available to all camera devices, regardless of PDA model.

To change a setting, select the setting and tap **Change**, or double-tap on the setting in the menu.

To reset to the default values, tap **Reset**.

The settings important to the Facility Management Software are **Instant Review** and **Self-Timer**.



Capture Menu

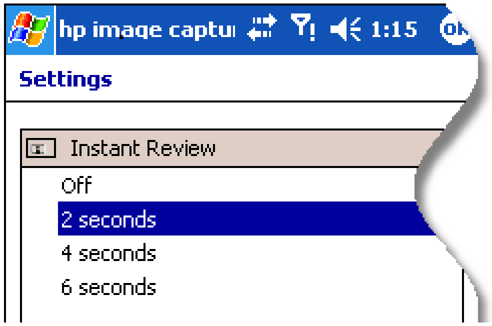
Camera Sounds (On)

Instant Review (2 seconds)

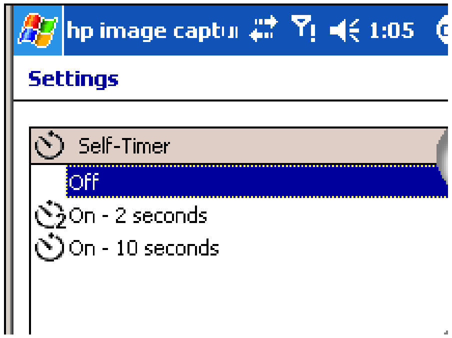
Self-Timer (Off)

INSTANT REVIEW

Immediately after you take a photo, the captured image displays on the screen for review. The image displays for only as long as the **Instant Review** has been set.



hp image captu 1:15 ok
Settings
Instant Review
Off
2 seconds
4 seconds
6 seconds



hp image captu 1:05
Settings
Self-Timer
Off
On - 2 seconds
On - 10 seconds

Setting options include:

- **Off** – disable Instant Review
- **2 seconds** – 2-second review (default)
- **4 seconds** – 4 second review
- **6 seconds** – 6-second review

SELF-TIMER

Setting options include:

- **Off** – Picture is taken immediately after shutter button is pressed (default)
- **On: 2 seconds** – Picture is taken 2 seconds after shutter button is pressed
- **On: 10 seconds** – Picture is taken 10 seconds after shutter button is pressed

File Tab

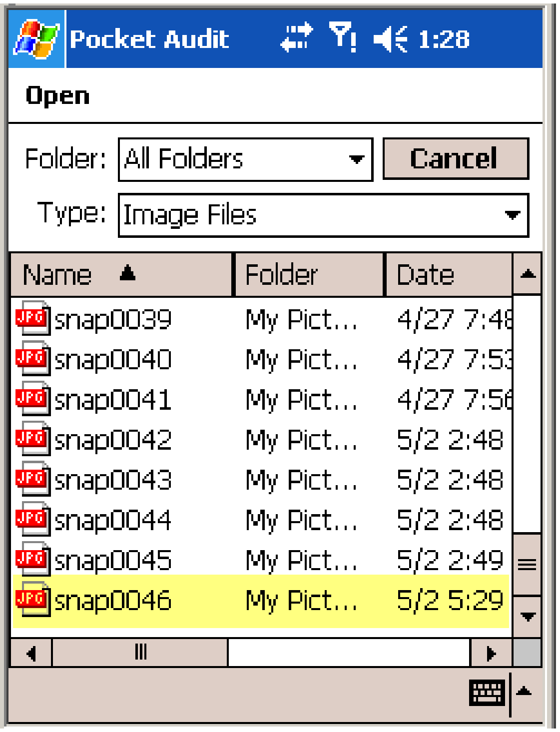
Image files are listed under the File tab.

The **Filename prefix** is the *text* added to the prefix of the file name. The default text is “snap”.

The **Current counter value** is the *number* appended to the filename prefix. This number will automatically increment every time a picture is taken. Once it exceeds 9999, the number will return to 0000. If the filename already exists, the next number will be used.

An example of a default filename is “snap0046” (in the example, yellow highlighting added).

The **Save pictures in** field shows the name of the folder where the images are saved. The location will be set up at the time of facility setup.



Open

Folder: All Folders

Type: Image Files

Name ▲	Folder	Date
snap0039	My Pict...	4/27 7:4
snap0040	My Pict...	4/27 7:5
snap0041	My Pict...	4/27 7:5
snap0042	My Pict...	5/2 2:48
snap0043	My Pict...	5/2 2:48
snap0044	My Pict...	5/2 2:48
snap0045	My Pict...	5/2 2:49
snap0046	My Pict...	5/2 5:29

OTHER CAMERA FEATURES

Zoom

- To zoom in: Press the **Zoom In** button or press **up** on the control pad.
- To zoom out: Press the **Zoom Out** button or press **down** on the control pad.

During zoom, the zoom indicator will appear to show the current zoom state. If zoom is set to the default level (wide angle), the indicator will disappear after a few seconds. Otherwise, it will remain on screen.

Zoom is not available on all cameras.

Exposure Compensation

Use the EV setting to override the default exposure setting (0.0) of the camera and manually correct for scenes that are too dark or too bright. Adjusting the EV setting changes the shutter speed and/or the gain. EV values can be adjusted between -3.0 and 3.0 in increments of 0.5.

- Setting a more positive EV makes the images brighter. Press **right** on the control pad.
- Setting a more negative EV makes the image darker. Press **left** on the control pad.

During EV adjustment, the EV indicator will show the EV state. If EV is set to the default level (0.0), the indicator will disappear after a few seconds. Otherwise, it will remain on the screen.

Exposure compensation is not available on all cameras.

On-Screen Indicators

- Camera shake warning indicator (✋) – Available on some cameras, the camera shake warning indicator displays when the shutter speed is slower than 1/15 seconds to indicate that the camera should be held steadily or braced against a surface before taking a picture to avoid blurring.

- Timer indicator (⏲) – The timer indicator displays, if the timer is not turned off.

Additional indicators will be shown in the upper left of the screen, if the settings are changed from the default values.

PDA MAINTENANCE

Keep battery charged.

Synchronize the PDA before and after conducting an audit.

TROUBLESHOOTING

Problem	Error Message	Possible Causes	Corrective Action
Camera icon does not appear in the PDA toolbar	No message		• Go to **Programs**. • Click on **HP Photo Smart** to activate camera. • Take a photo. • The camera will be added to the toolbar.
Login problems with the Internet application.	Error: The username and password combination you provided was invalid.	Incorrect username or password	Make sure username and password are typed correctly; username and password are case sensitive.
		Forgotten username or password	Check with your System Administrator.
		Restricted permission level	Check with your System Administrator.

Problem	Error Message	Possible Causes	Corrective Action
Microsoft ActiveSync is not working.	No message	Several possible causes	• Remove the PDA from the docking station. Wait 30 seconds, then replace it into the docking station. • Make sure the PDA is turned on. • Do a soft rest on the PDA by following the instructions in your PDA Manual. • Restart the computer. • Make sure you have a standard or guest partnership. • If you are still unable to get a connection, contact your System Administrator.

Problem	Error Message	Possible Causes	Corrective Action
PDA does not display audits.		- PDA was not synchronized with the database. - Synchronization was not allowed to run to completion.	Synchronize the PDA and computer by running ActiveSync and RepliSync. Wait for message that synchronization is finished before disconnecting the PDA.
PDA will not start.	No message	Battery is dead.	Charge the battery.
		PDA is not correctly inserted into the docking station to allow the battery to charge.	Make sure PDA is correctly inserted into the docking station.
PDA will not synchronize.	A request to send data to a computer running IIS has failed.	There is no Internet connection.	- Make sure PDA is connected to the PC. - Make sure Internet connection is established. - Make sure that **Microsoft ActiveSync** has run before starting **RepliSync**.

Problem	Error Message	Possible Causes	Corrective Action
PDA will not synchronize.			If you are trying to run RepliSync from a hotel, you may need to request a bridge or a new IP address from the hotel front desk.
	The header is corrupt or missing.	There is an Internet connection, but PDA is unable to send data.	If you are trying to run RepliSync from a hospital, you must add the proxy URL used by the hospital to the PDA: • Open **RepliSync**. • Go to **File>Remote DB Settings**. • Make sure the information in the **Login name** and **Password** boxes is correct.
	The process could not connect to Distributor 'kdata1 1'.	Login name is not entered correctly on the PDA.	• Open **RepliSync**. • Go to **File>Remote DB Settings.** • Make sure login information is correct.

Problem	Error Message	Possible Causes	Corrective Action
PDA will not synchronize.	Publication does not exist.	Publication does not exist. The publication is not entered correctly on the PDA.	• Open **RepliSync.** • Click on **File>Remote DB Settings**. • Check the **Publication** box to make sure everything is spelled correctly, with no additional characters or spaces.
	The subscription to publication xxx is invalid.	You did not delete a previously used publication before selecting this one.	• Go to **Programs**. • Click on **File Explorer** icon. • Select the **bluegranite** folder. • Delete the hss file by pressing **hss** with the stylus for five seconds. • A menu will display; select **Delete**. • When prompted, select **Yes**. • Start **RepliSync**. Database should synchronize successfully.

Problem	Error Message	Possible Causes	Corrective Action
PDA will not synchronize	Subscription expired.	This publication has not been used in the past 14 days.	• Delete the hss file by pressing **hss** with the stylus for five seconds. • A menu will display; select **Delete**. • When prompted, select **Yes**. • Start RepliSync. Database should synchronize successfully.

Problem	Error Message	Possible Causes	Corrective Action

PDA will not synchronize.	No file.	The bluegranite folder has been removed from the Program files.	• Go to **Programs**.
			• Click on the **File Explorer** icon.
			• Make sure **My Device** displays in the top left of the PDA screen.
			• Select the **Program Files** folder.
			• Look for the **bluegranite** folder. If this folder does not exist, create one, as follows:
			  o Click on **Edit>New Folder**.
			  o Name the new folder “bluegranite”.
			  o Run **RepliSync**.

Photos are blurry.	No message	Camera resolution setting may need adjustment; user may be snapping photos too hastily, not allowing camera time to adjust.	In camera mode, check the resolution setting; take more time when taking photos to allow the camera to automatically adjust.

Problem	Error Message	Possible Causes	Corrective Action
Photos are upside down.	No message	Flip mode on the camera has been activated.	Reset the flip mode on the camera.
Program (e.g., RepliSync) removed from PDA.	No message	PDA batteries are dead.	Reinstall program. Contact System Administrator.
Unable to delete the hss file.	Unable to delete the hss file because of a sharing violation.	More than one application is running.	• Go to **Start>Settings>System**. • Click on the **Memory** icon. • Click on **Running Programs>Stop All**. • Make sure the **Running Program List** is empty. If the list is not empty, click on **Stop All** again. If the list is empty, close out by clicking on **OK** in the top right corner of the screen. • Delete the hss file by pressing **hss** with the stylus for five seconds.

Problem	Error Message	Possible Causes	Corrective Action
			• A menu will display; select **Delete**. • When prompted, select **Yes**.
Unable to view photos or reports	No message	Restricted permission due to User level.	Check with your System Administrator.
		Pop-up screens may be blocked.	Check with your System Administrator.
Wrong comment attached.	No message	User error	Turn to the Editing an Audit section of this User's Manual.
Wrong department or location attached.	No message	User error	Turn to the Editing an Audit section of this User's Manual.
Wrong photo attached.	No message	User error	Turn to the Editing an Audit section of this User's Manual.

GLOSSARY

THE COMPUTER SOFTWARE AND DATABASE

Term	Definition
Ad Hoc Report	A customized report type designed to allow users to select the desired variables
Add/Edit	The function used to add new facility or audit information or to make a permanent change to existing information relating to a database entry
Audit Type	The audit management task used to Identify/name an audit created for use on the PDA
Auditor	The person responsible for performing an audit/inspection and who may be the person who finalizes it
Date Range	The range of dates for data the user would like to include for reporting purposes
Deficiency	The description of non-compliant observations made when performing an audit; also the text field that is available for review on the handheld PDA during an audit and is communicated to responsible parties via email afterward
Department Manager Link	The function used to link a manager to a department
Director Link	The function used to link departmental managers to the responsible party

Term	**Definition**
Element	All the things that need to be done to achieve a goal or standard
Email Audit	The function used to email an audit to the responsible parties
Export Audit	The function used to export an audit into a Word document
Global Audit Type	An audit named and available in the database for use by all clients
Manage Audits	The function tab on the Facility Management Software web banner used to view, edit, email, or finalize audit findings
Performance Report	A report available for users which tallies the assigned audit points; most commonly used with Quality Assurance and Housekeeping audits; also called the Tally Points Report
Permission Levels	Access to database functions determined by User Type, as follows: • Consultant—Access to data for multiple health systems; able to add or edit a database for consultants assigned accounts • Hospital System Administrator—Access to data for all hospitals or facilities within a health system; able to add or edit the database for the entire health system • Facility Administrator—Access to data within one hospital or health system; able to add or edit the database of that one hospital

Term	Definition
	- User—Access to only certain audit types and to all reports; not able to add or edit the database
Points	The value applied to a deficiency for reporting purposes
Short Description	The description of a deficiency that appears on the PDA as the standard
Standard	The goal to be achieved and maintained; may be a regulation
Static Report	Ten drill-down reports available to all users
Supervisor Link	The function used to link a responsible party to department area(s)
Synchronization	Process by which a user keeps information up to date on both PC and PDA; allows the user to share files, display updated contacts, appointments, and tasks, and send and receive email messages
Web-based Application	A software program, such as the Facility Management Software Program, in which all or part of the program is downloaded from the Internet each time the program is used
Word Document	The version of the audit findings exported from the database for formatting and printing

THE HANDHELD PDA

Term	Definition
Add/Edit	A function on the PDA that allows the user to add a new building, new facility area, new department, and/or a new department area to the database from the PDA when performing an audit; the new audit will become permanent to the database and will be available in the drop-down menu during future audits.
Custom Deficiency	A function on the PDA that allows the user to enter a deficiency that is not in the Audit Type database; the deficiency will appear in the Word document and in reports, but will not be saved for future use. To make a deficiency permanent, it must be added to the database from the **Audit Type** menu under the audit **management** tab menu on the web application
Drop-down Menu	A menu whose contents are shown only when the user activates it, normally by clicking on the box or a small arrow next to the box, whereupon the menu items appear below the title
Icon	A graphical user interface on a computer screen that represents a specific program, for example the Pocket Audit Program, the RepliSync program, and the Camera application; clicking the icon opens the program.
Microsoft ActiveSync	A program that allows the PDA to communicate with the computer
New Audit	The menu choice selected under the "**File**" tab on the PDA when the user wants to create a new document, as when beginning an audit

Term	Definition
Open Audit	The menu choice selected under the "**File**" tab on the PDA when the user wants to re-open an audit interrupted in progress after having closed the Pocket Audit application (as, for example, after a lunch break) or to toggle between more than one audit
Personal Digital Assistant (PDA)	The handheld computer used to collect audit data
Pocket Audit	The audit application, available from the Programs menu, opened by clicking the Pocket Audit icon
RepliSync	A program used by the Facility Management Software application to transfer data from the PDA to the server on which the web-based software application resides; the transfer is done via the user's computer and an Internet connection.
Scroll Bar	A graphical user interface displayed on the PDA screen which, when manipulated with the stylus, allows the user to move vertically or horizontally to view all portions of a screen or image; usually features directional arrows