The purpose of this reference guide is to provide you guidance on some basic and advanced functions in the RenalSoft Software.

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Navigate Help

The Help feature provides detailed descriptions of the RenalSoft Software components.

Step 1: Access Help

- On the Home page, click the Help button on the tool bar at the top of the screen.

  Note: There are three ways to search for the help content, which is through the Contents tab, Index tab, and the Search tab.

Search for Help via the Contents Tab

- Click the plus sign icon next to a relevant topic on the Contents tab to view the subtopics.

- Click the plus sign icon next to a sub-topic to view the list of topics.

- Click a relevant topic to view the specific help topic.
Search for Help via the Index Tab

- Click the Index tab.
- Enter the relevant keyword, for example, PRO, in the Keyword field. The list of topics displays.
- Click the topic name to view the specific help topic.

Search for Help via the Search Tab

- Click the Search tab.
- Enter the keyword, for example, Erase PRO Card, in the Keyword field.
- Click the List Topics button to view related topics.
- Click the relevant topic to view it.

For more information about navigating help, refer to the following Help sections in the RenalSoft Software:

Shared Functions → Using Online Help → Help Organization
Administration – Set Up Favorites

Favorites offer shortcuts to frequently used features and information. There are three sections within Favorites: My Favorites, My Reports, and My Patient Groups.

Step 1: Set Up My Favorites

- Locate the feature to add to your favorites.
- Right-click the feature name. A pop-up displays.
- Click Add to Favorites in the pop-up.
- Confirm the feature has been added to the My Favorites window.

Step 2: Set Up My Reports

- Click Reports in the left Navigation menu. The Working with Reports menu displays.
- In the Working with Reports menu, click the plus and minus signs besides each folder to expand or collapse the folders and locate the desired report.
- Right-click the Report name. A pop-up window displays.
- Click Add to Favorites in the pop-up window.
- Confirm that the feature has been added to the My Reports window.
Step 3: Set Up My Patient Groups

My Patient Groups allows you to quickly locate patients.

- Locate the My Patient Groups window on the Home Page and click the down arrow. The My Patient Groups window expands.

- Right-click an unassigned patient group icon. A pop-up window displays.

- Click Assign Group in the pop-up window. The Patient Groups pop-up window appears.

- Select the desired Patient Group from the Patient Groups pop-up window.

- The selected group displays in the My Patient Groups window.

- Right-click the group and select the View Patient List option to view the list of patients in the group. Selecting a patient from the list puts that patient in context in the RenalSoft Software.

For more information about setting up favorites, refer to the following Help sections in the RenalSoft Software:

User Guide → General → Home Page Orientation
Administration – Manage/Edit Staff

Step 1: Access Staff Record

- Click Maintenance in the left Navigation menu. The Working with Maintenance menu displays.

- Click Staff Records in the Working with Maintenance menu. The Staff Records screen displays.

Step 2: Edit Address (optional)

- On the Staff Records screen, click the Address tab.

- Modify the address, as required.

- Click the Save button.

Quick Tip

Custom values can be added to any drop-down list by clicking the button next to the drop-down. This displays Select Lists Maintenance window, where by clicking the New button you can enter a customer value. Remember to click the Save button to commit the changes.
Step 3: Edit Phone/Email (optional)

- On the Staff Records screen, click the Phone/E-mail tab.
- Modify the phone and email details, as required.
- Click the Save button.

Step 4: Edit Security Details

- On the Staff Records screen, click the Security tab.
- Modify the security details, as required.
- Click the Save button.

For more information about editing staff information, refer to the following Help sections in the RenalSoft Software:

Shared Functions → Administrator Only Functions → Staff Information → Staff Records → Add/Modify/Delete Staff Records
PD Treatment Record

PD Treatment Record is an important report/document showing the report of treatment on a daily basis. There are three main tabs in the PD Treatment Folder: Therapy Summary Tab, Messages Tab, and the Reports Tab.

Step 1: Access PD Treatment Record

- Click Dialysis in the left Navigation menu. The Working with Dialysis menu displays.
- Click PD Treatment Record in the Working with Dialysis menu.

Step 2: Select Patient

- Click the Name drop-down list to look for and select a patient.
- If the desired patient cannot be found in the drop-down list, click the folder icon next to the drop-down field to search for the patient.
Step 3: Review Therapy Summary

Therapy Summary Tab

- The most recent Therapy Summary displays.
- The view defaults to the Therapy Parameters sub-tab, which compares the prescribed treatment parameters with the actual treatment parameters.
- To view historic treatment summaries, click the Date drop-down.
- Discrepancies between what was prescribed and the Actual therapy administered will appear highlighted in Yellow.
- Click the Therapy Details sub-tab to view the actual treatment details on a cycle-by-cycle basis.
- To view the Therapy Details, click Night or Day, if available, otherwise continue.
Step 3: Review Therapy Summary (continued)

- Click the **Optional Manual Exchange Info** sub-tab to enter the required parameters for manual exchanges.

- Click the **Additional Rx Information** sub-tab to view pre and post therapy lab information, as well as the Machine Serial Number.
Step 4: Review Device Messages

- The Message tab displays any alarms received during the treatments.
- Enter **Start** and **End** dates, and then click the **Display** button to view messages for a specific date range.
- The Messages Displayed can be viewed by
  - All
  - Therapy Related (such as Caution: Neg UF, Fill/Drain Not Finished, Low Drain Volume, Therapy Aborted), or by
  - Specific Type of message.

For more information about PD Treatment Record, refer to the following Help sections in the RenalSoft Software:

PD → PD Results Folder
PD Compliance Profile

The PD Compliance Profile provides a snapshot of patient treatments over a period of time.

Step 1: Navigate to PD Compliance Profile

- Click Dialysis in the left Navigation menu. The Working with Dialysis menu displays.
- Click PD Compliance Profile in the Working with Dialysis menu. The Report Criteria window displays.

Step 2: Select Report Criteria

- Select desired Patient or Patient Group.
- Specify the desired Date Range.
- Click the OK button.
Step 3: Review Compliance Profile

- Review **Compliance Calendar**.
- If desired, select one or more reports to view or print.
- To view a different patient, click the **Reselect** button.

For more information about PD Compliance Profile, refer to the following Help sections in the RenalSoft Software:

PD → PD Compliance Profile folder
PD Rx Management

This section is used to calculate, model, and predict the adequacy of different PD therapy regimens. This will aid you in selecting the best PD prescription for the patient.

Step 1: Navigate to PD Rx Management

- Click Dialysis in the left Navigation menu. The Working with Dialysis menu displays.
- Click PD Rx Management in the Working with Dialysis menu. The RenalSoft PD Rx Management window displays.

Step 2: Select Patient

- In the Patient section, locate the desired record.
- Click the record to select it. Note that a collection record exists in the Collection section.
- To only display Active patients in the list, select the View PDRxMgt Active Patients checkbox.
Step 3: Enter Lab Values

- Click the Collection menu and select the New Collection... option. The New Collection window displays.
- Type the date of collection, or accept the current date in the Collection Date field.
- Complete the optional fields on the New Collection window, as desired.
- Click the OK button to save the changes. The 24-Hour Collection window displays.

Step 4: Enter 24-Hour Collection Information

Note: Required fields on this window are noted in blue.

- Enter relevant values in the Serum Concentration section.
- Enter relevant values in the 24-Hours Dialysate Collection section.
- Click the Calculate button to populate the values in the Calculated Values section.
- Click the OK button to save changes and close the window.

For more information about importing setting up 24-Hour Collection, refer to the following Help sections in the RenalSoft Software:

PD Rx Management → Collection Record Tasks → Creating a New 24-Hour Collection Record
Step 5: Enter PET Information

- Click the **Collection** menu and select the **PET...** option. The PET window displays.

- Enter the following PET information:
  - Enter the PET Date.
  - Enter Overnight Exchange values.
  - Enter Four Hour Equilibration values.
  - Enter Data values.
  - Add the Correction Factor.
  - Check Typical Values to use 1.0 in the Fluid Absorption (mL/min) and 10% in the Residual Dialysate Volume (mLs).

- Click **Calculate** to calculate the Fluid Absorption and Residual Dialysate Volume fields.
  - Click the **Fluid Absorption...** button to view the calculation details.

- Click **OK** to save the record.

For more information about importing setting up PET records, refer to the following Help sections in the RenalSoft Software:

PD Rx Management → PET-related Tasks → Adding a PET Record

**WARNING!** *RenalSoft PD Rx Management* requires accurate data for the overnight and four-hour drain volumes and dwell times. The data must be entered into the PET window very carefully from the test results. These values are extremely important since they provide the information used to calculate accurate predictions of patient clearance and ultrafiltration for various dialysis regimens.
Step 6: Model Treatment

- Click the menu icon. The Regimen Data window displays.
- Click the desired regimen type in the Create New Regimens section.

**NOTE:** If an existing prescription is imported by clicking the Import from PD Prescriptions… button in the Regimen Data window, the Current Rx checkbox will be checked in the Regimen Details window.

- The selected Regimen Details window displays.
- Enter the information for the desired regimen.
- Click the Continue button. The Regimen Predictions window displays.

- The newly created regimen displays along with other previously created regimen predictions.
- Click the Save button to save the prediction.
Step 6: Model Treatment (continued)

- Click the Print Details or Print Summary buttons to print the respective report.

- A preview of the report displays in a new window.

- Click the Print button to print the report.

- Click the Close button to close the report and return to Regimen Predictions window.

For more information about importing setting up PET records, refer to the following Help sections in the RenalSoft Software:

PD Rx Management  Regimen Tasks
HD/PD Access Management – Lab Set Up

HD/PD Access Management helps you to track the creation of an access, infections, hospitalizations, details, assessments and medications related to an access.

Step 1: Navigate to Labs

- Click Maintenance in the left Navigation menu. The Working with Maintenance menu displays.
- Click Labs in the Working with Maintenance menu.

Step 2: Set up Labs

The Lab Maintenance window displays.

- On the Source tab, type Test Lab in the Lab Name and Description fields.
- Select the relevant patient ID code from the Patient Additional ID Code drop-down list.
- Click the Save button.
- When prompted, type the password, and click the Close button.

For more information about lab setup, refer to the following Help sections in the RenalSoft Software:

Shared Functions → Administrator Only Function → Lab Maintenance
HD/PD Access Management – Add Access

This folder is intended to allow the user to track the creation of an access, infections, hospitalizations, details, assessments and medications related to an access.

Step 1: Navigate to HD/PD Access Management

- Click Dialysis in the left Navigation menu. The Working with Dialysis menu displays.
- Click HD/PD Access Management in the Working with Dialysis menu. The Access window displays.

Step 2: Add Access Details

- Select a Patient.
- Click the Access tab. The Access Details sub-tab displays.
Step 2: Add Access Details (continued)

- Click the **New** button. The **Implant Details** sub-tab displays.
- Verify the PD that is selected.
- Select the Access Type from the drop-down list.
- Complete the required fields in **aqua**.
- Complete desired optional fields in **white**.
- Click the **Save** button.

- The **Authenticate Signoff** window displays.
- Enter your name and password and click the **OK** button.

For more information about adding an access, refer to the following Help sections in the RenalSoft Software:
HD/PD Access Management → Access Tab
Step 1: Add Infection details

Note: If the patient has more than one access, click the Access tab and select the desired Access from the list at the top of the screen.

- Click the Infection tab.
- Click the New button.
- Enter the Infection Type. Click the plus sign icon to add a new Infection Type to the list.
- Enter the infection information in the required fields.
- Select the Relapse / Recurrence checkbox if appropriate.
- Click the Save button. The Authenticate Signoff window displays.
- Enter your user name and password and click the OK button.
Step 2: Add Intervention and Culture/Labs

- Click the blue **plus** sign icon in the **Interventions** section.
- Enter Intervention details.
- Enter the Final Diagnosis details.
- Click the **Save** button.
- Click the **Close** button.

For more information about adding an infection, refer to the following Help sections in the RenalSoft Software:
HD/PD Access Management → Infection Tab
Step 1: Access Non-Infection Tab

- Click the **Non-Infection** tab.
- Click the **New** button.
- Enter the non-infection information in required fields.
- Click the **Save** button. The **Authenticate Signoff** window displays.
- Enter your user name and password and click **OK**.

For more information about adding non-infection information, refer to the following Help sections in the RenalSoft Software:

**HD/PD Access Management → Access Tab**

For more information about other Access Management features, refer to the following Help sections in the RenalSoft Software:

**HD/PD Access Management → Medication Tab**
**HD/PD Access Management → Hospitalization Tab**
Reporting

The Reports menu contains commands to access Group Reporting, Individual Reports for current patient data and Administrative Reports.

Step 1: Navigate to Reports

- Click Reports in the left Navigation menu. The Working with Reports menu displays.
- In the Working with Reports menu, click the plus and minus icons besides each folder to expand or collapse the folders and locate the desired report.
- Double-click the desired report name.

Step 2: Enter Report Selection Criteria & Generate Report

- In the Selection Criteria window, select All Patient(s), Patient Group(s), or individual patients.
- Select the Date Range, Sort and/or Filter, and Reporting Criteria, if required.
- Click the OK button. The report displays in a new window.

For more information about reports, refer to the following Help sections in the RenalSoft Software:

Shared Functions → Creating Reports