RenalSoft Software

Quick Start Guide

Baxter

This guide will help you to get started doing simple tasks in RenalSoft Software.

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Administration – New Staff Set Up

[HOME](#)

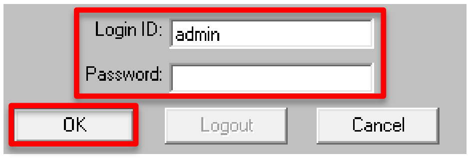
The first step in RenalSoft Software configuration is to set yourself up as an Administrator and add users of the software.

Step 1: Navigate to RenalSoft Software

- Double-click the **RenalSoft** Software icon on the desktop.

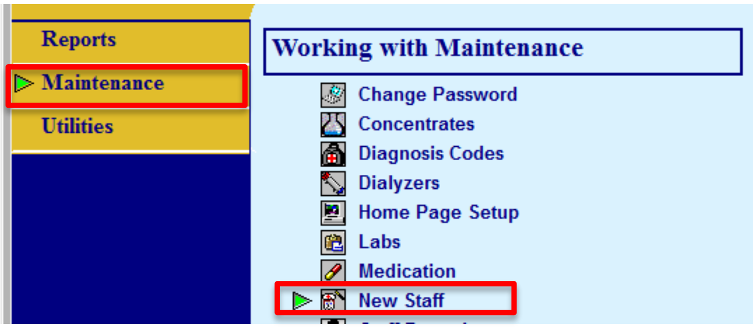
Step 2: Access Login

- Type ***admin*** in the **Login ID** field.
- Type ***admin*** in the **Password** field.
- Click the **OK** button.



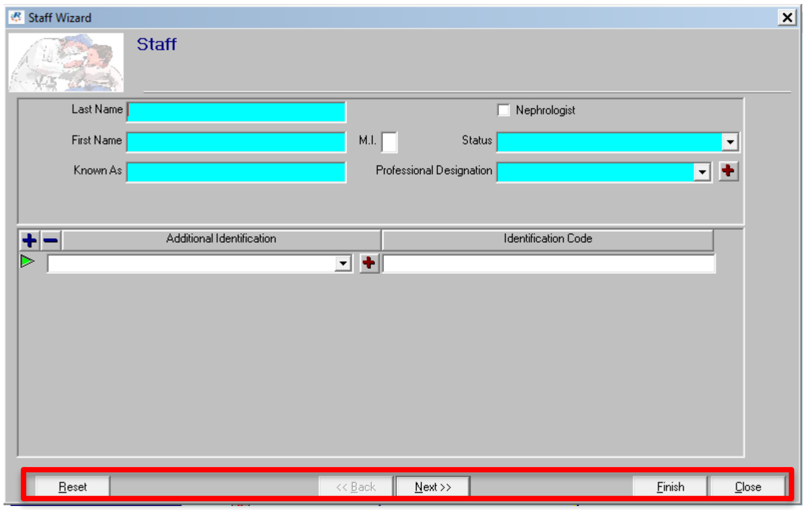
Step 3: Navigate to New Staff

- Click **Maintenance** in the left Navigation menu.
- Click **New Staff** from the **Working With Maintenance** menu.
- The **Staff Wizard** window displays.



Step 4: Set up New Staff

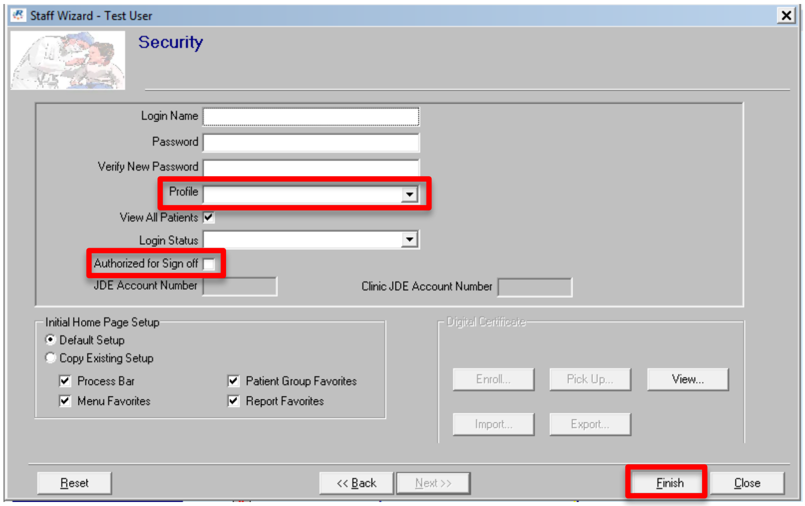
- Enter user information on each screen.
- Required fields are noted in aqua color.
- Use buttons at the bottom of the screen to navigate.
- On the **Staff** screen, set **Status** as **Active**.
- Click the **Next** button until the **Security** screen displays.



- On the Security screen, complete the fields
  - Set **Profile** as **PDFULLADMIN**.
  - Select **Login Status** as **Active**.
  - Select the **Authorize for Signoff** checkbox.

Note: Password must be at least 7 characters.

- Click the **Finish** button to complete set up.
- A response message displays indicating the new staff record was created successfully.



Note: After setting yourself up as an administrator, you can logout and log back in with your own Login Name.

Quick Tips – Staff Set Up

Additional Staff

- Create records for Nurses, Physicians, Surgeons and any other staff who will access the application or need to be associated to a patient record.
- If the staff member does not need access to the application, but will be associated to a patient, then there is no need to complete the **Security** screen.

Designate Nephrologist

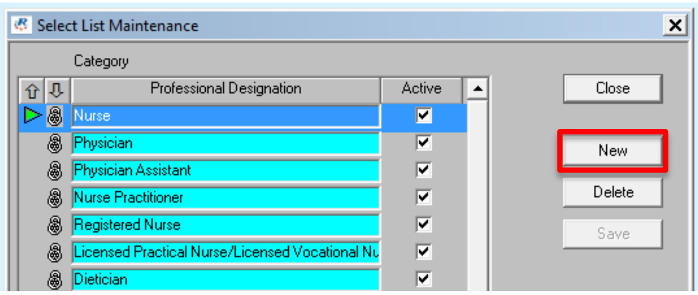
- Select the **Nephrologist** checkbox if the Doctor is a nephrologist ☐ Nephrologist .

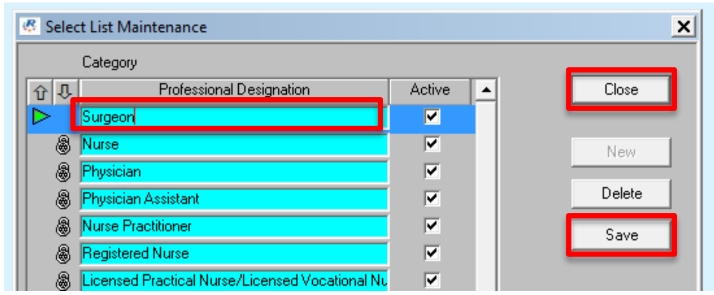
Add a Surgeon

- On the Staff screen, locate the **Professional Designation** field and click the red **plus** sign icon.

- The Select List Maintenance screen displays. Click the **New** button, enter **Surgeon** in the **Professional Designation** field.
- Click the **Save** button, then click the **Close** button to close.

Note: The above process can be used to add other designations as necessary for your clinic.





- On the Staff screen, select **Surgeon** in the **Professional Designation** field.
- Complete New Staff set-up.

Help

For more information about New Staff set up, refer to the following Help sections in the RenalSoft Software:

Shared Functions→Administrator Only Functions→Staff Information→New Staff (Staff Wizard)

Shared Functions → Administrator Only Functions → Security Profiles

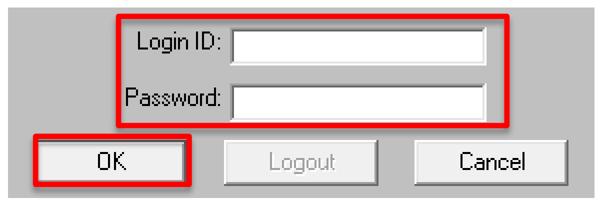
Administration – Clinic Configuration

HOME

It is necessary to configure RenalSoft Software specifically to the needs of your clinic.

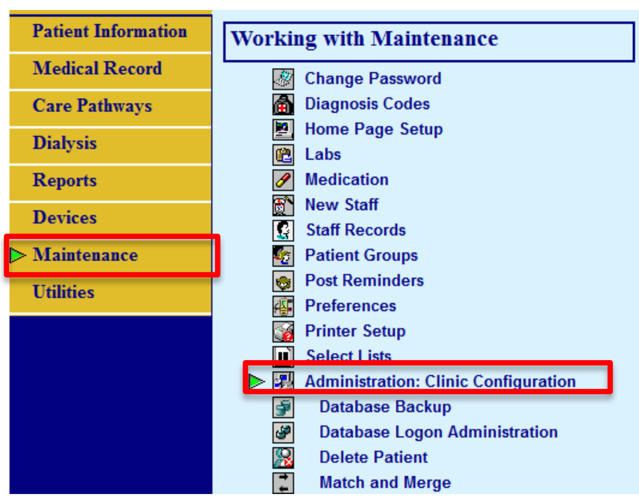
Step 1: Login

- Enter the admin login you created for yourself in the **Login ID** field.
- Enter your password in the **Password** field.
- Click the **OK** button.



Step 2: Navigate to Clinic Configuration

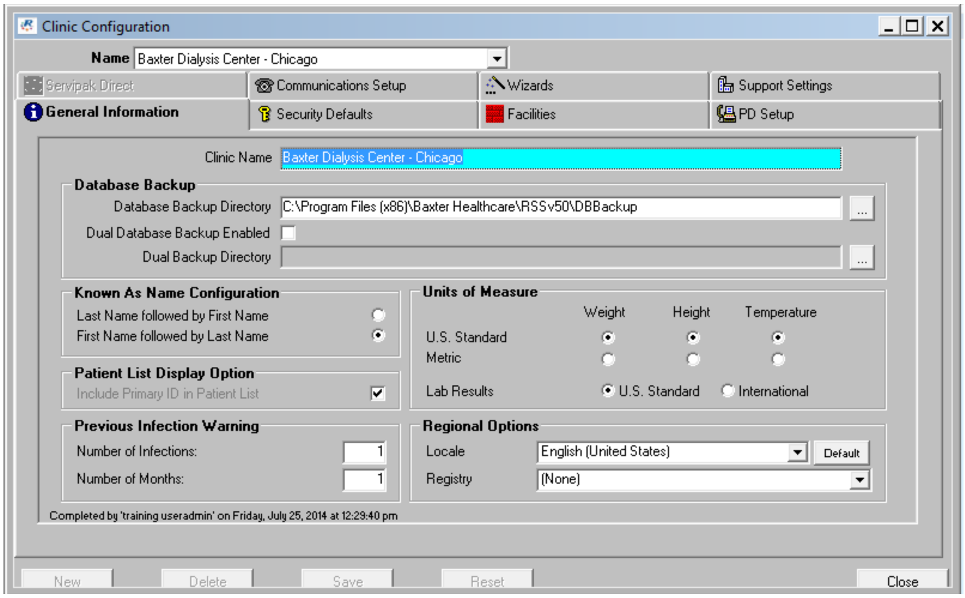
- Click **Maintenance** in the left Navigation menu.
- Click **Administration: Clinic Configuration** in the **Working with Maintenance** menu**.**
- The **Clinic Configuration** window displays.



Step 3: Configure Clinic

Note: Required fields are noted in aqua color.

- General Information
  – Review information and update as desired.

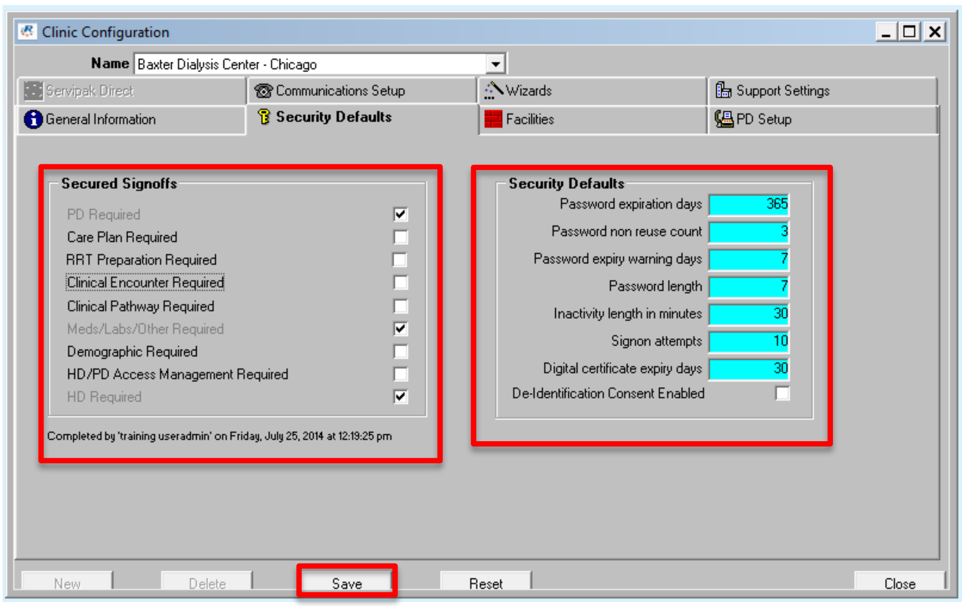


- Security Defaults
  – Remove all checkmarks from the **Secured Signoffs** section.

    Note: Field names in grey cannot be removed.

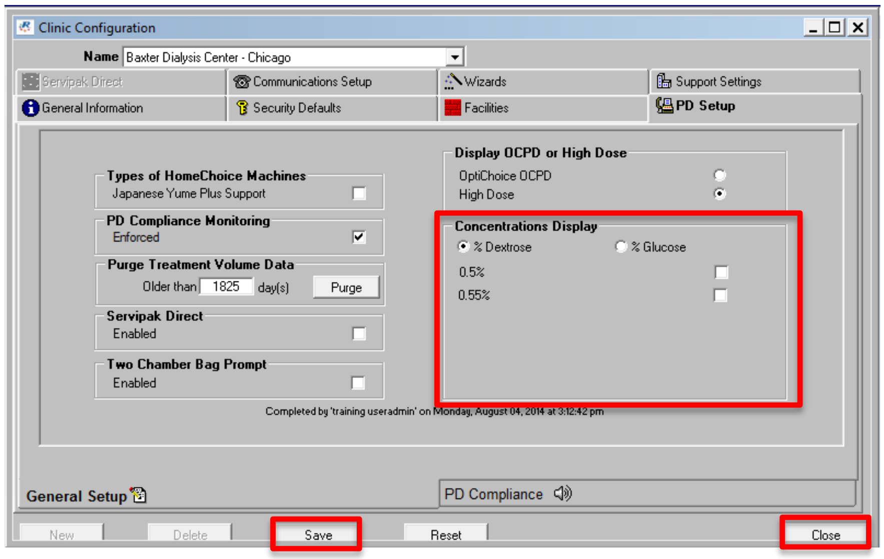
  – Enter required information in the **Security Defaults** fields.

  – Click the **Save** button.



Step 3: Configure Clinic (continued)

- PD Setup
  - In the **Concentrations Display** section, select which concentrations to display in the RenalSoft Software.
- Click the **Save** button to commit changes.
- Click the **Close** button.

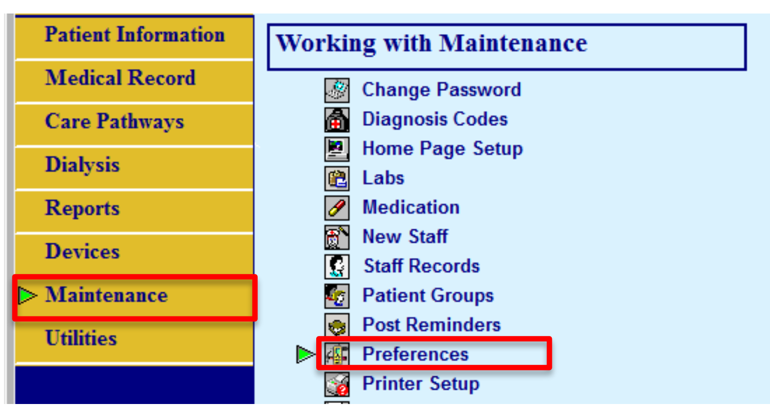


Help For more information about Clinic Configuration, refer to the following Help sections in the RenalSoft Software:

Shared Functions → Administrator Only Functions → Clinic Configuration

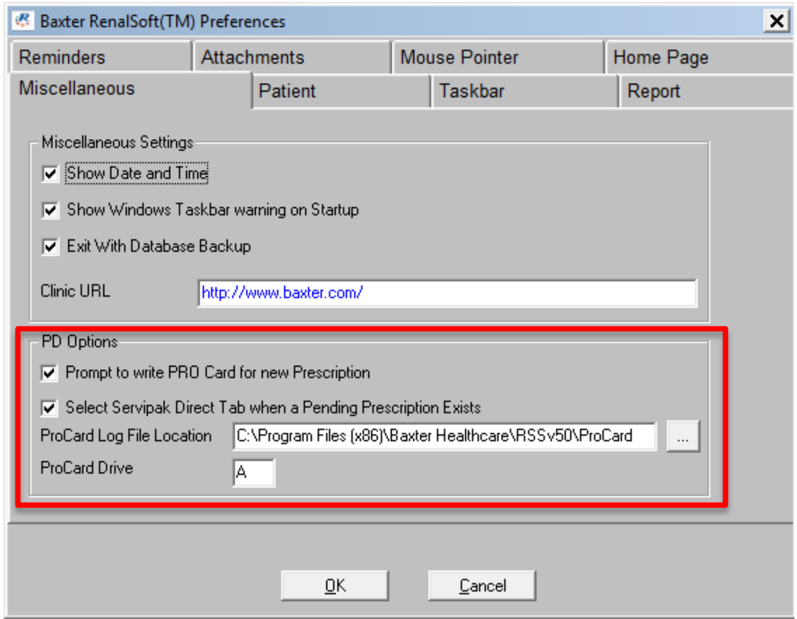
Step 4: Navigate to Preferences

- Click **Maintenance** in the left Navigation menu.
- Click **Preferences** in the **Working With Maintenance** menu.



Step 5: Configure Preferences

- **Miscellaneous** tab
  - In **PD Options,** define PRO Card Drive preferences.
  - To locate **ProCard Drive**,
    - Plug the PRO Card into Computer USB port.
    - Click the Windows icon.
    - Click **Computer.**
    - Note the letter of the PRO Card drive and then enter it in the **ProCard Drive** field in the RenalSoft Software.



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

User Guide → General → Basic Program Setup for the Administrator → Preferences

RENALSOFT Software

Create Patient

HOME

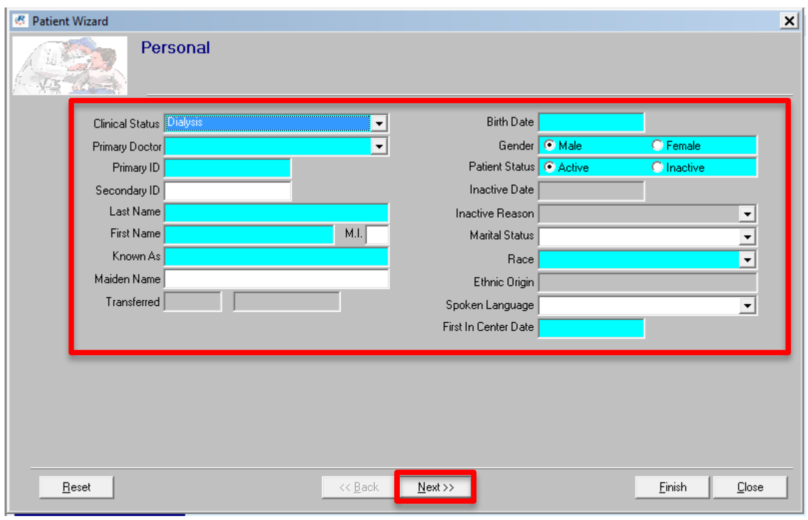
Step 1: Navigate to Patient

- Click **Patient Information** in the left Navigation menu.
- Click **New Patient** in the **Working with Patient Information** menu. The **Patient Wizard** window displays.

Step 2: Complete Personal Information

Note: Required fields are noted in aqua color.

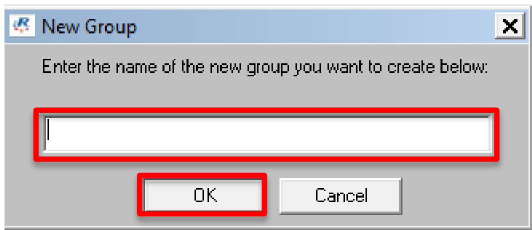
- Complete all required fields on the **Personal** screen.
- Click the **Next** button to continue. The **Patient Groups** page displays.

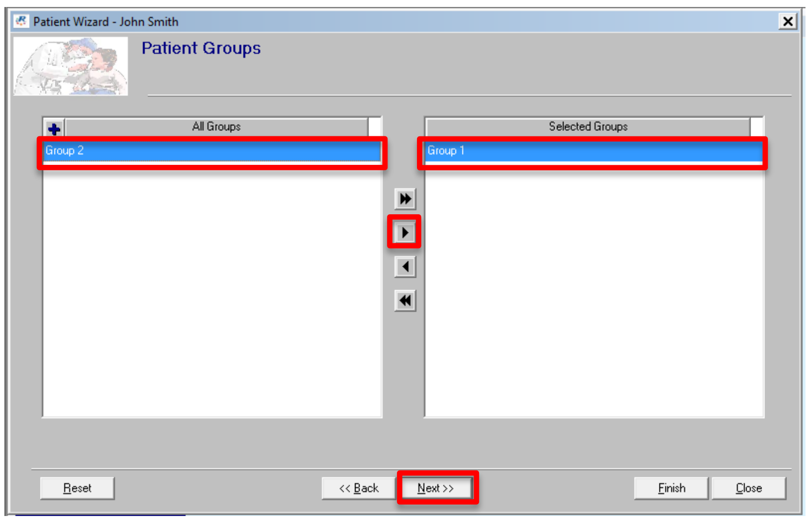


Step 3: Set Patient Group (Optional)

- Click the **plus** sign icon to add a group.
  - The **New Group** pop-up displays.
- Enter the name of the group to create in the New Group pop-up, and then click the **OK** button.

  Note: When a New Patient Group is created, it automatically moves to the **Selected Groups** section.
- Click the **Next** button to continue.





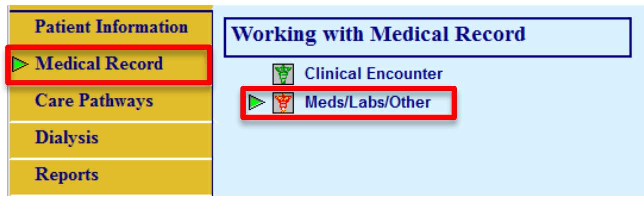
Step 4: Other Patient Information (Optional)

- Complete information on the following screens, if desired:
  - Address
  - Phone / Email
  - Additional ID
  - Care Team
- Click the **Finish** button to create the patient record.

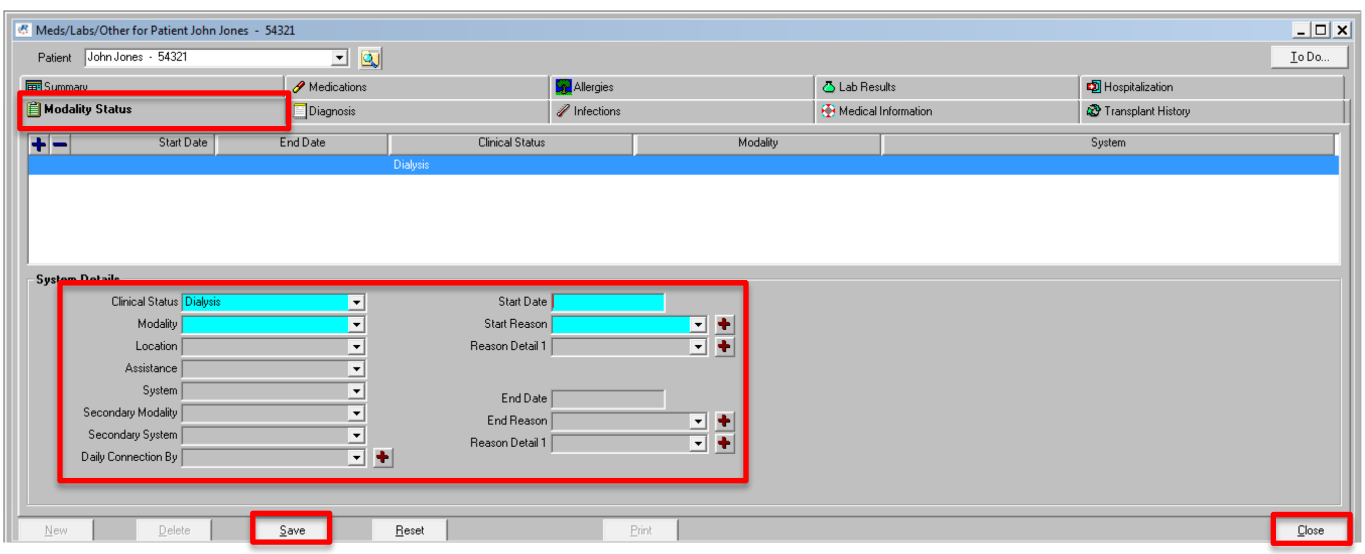
RenalSoft Software

Step 5: Define Patient Modality

- Click **Medical Record** in the left Navigation menu.
- Click **Meds/Labs/Other** in the **Working with Medical Record** menu. The **Meds/Labs/Other** window displays.



- Click the **Modality Status** tab located in the top left of the screen.
- Enter required information. Click the **Save** button.
- In the **Authenticate Signoff** window, enter your password, then click the **OK** button.
- Click the **Close** button.



Help

For more information about creating new patients, refer to the following Help sections in the RenalSoft Software:

Shared Functions → Patient Information → New Patient (Patient Wizard)

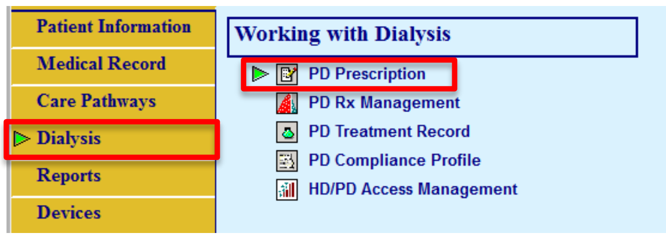
Shared Functions → Meds/Labs/Other → Meds/Labs/Other Folder

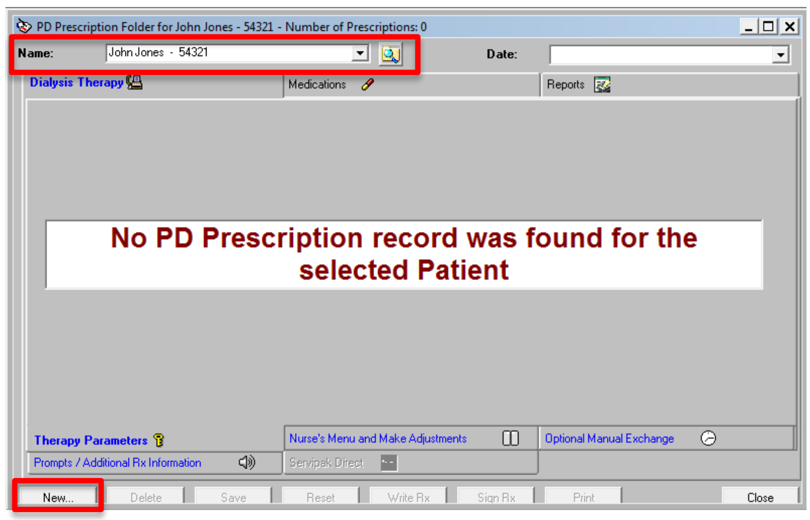
Add Prescription

[HOME](#)

Step 1: Navigate to Prescription

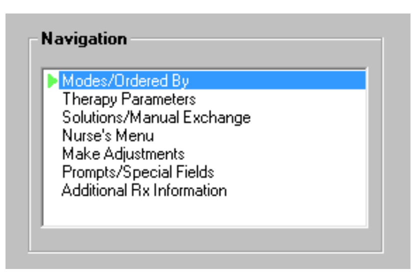
- Click **Dialysis** in the left Navigation menu.
- Click **PD Prescription** in the **Working with Dialysis** menu.
- The **PD Prescription Folder** window displays.
- Click the **Name** drop-down menu and select the desired Patient from the list.
- Click the  icon to search for Patient records.
- Click the **New…** button to open the PD Prescription Wizard.





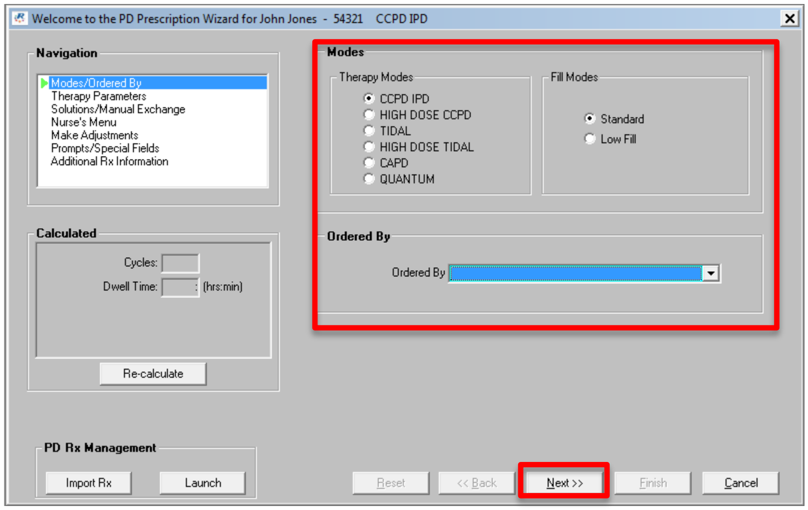
Step 2: Set-up Prescription

- To Navigate the Wizard
  - Select the desired screen from the Navigation menu.
  - Click the buttons at the bottom of the window.



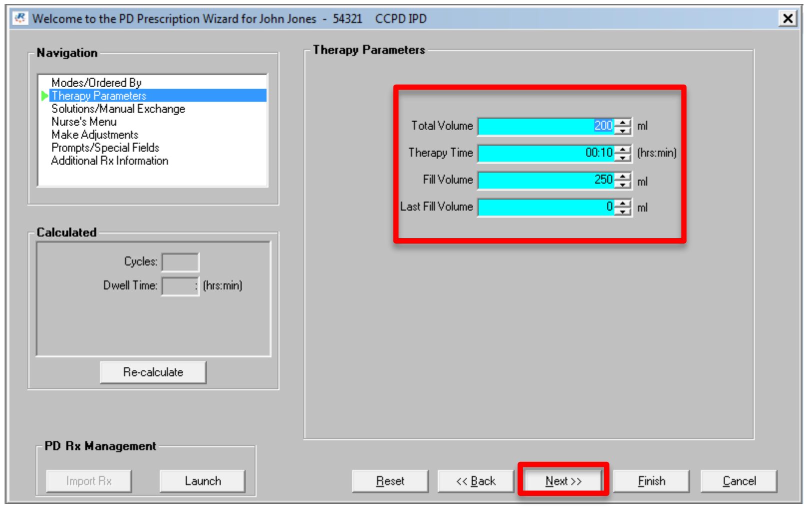
Step 2: Set-up Prescription (continued)

- Modes/Ordered By
  - Select the desired **Therapy Mode** radio button.
  - Select the desired **Fill Mode** radio button.
  - Select the ordering physician in the **Ordered By** drop-down list.
  - Click the **Next** button.



Note: Therapy Mode selected will determine the prescription areas displayed in the Navigation list.

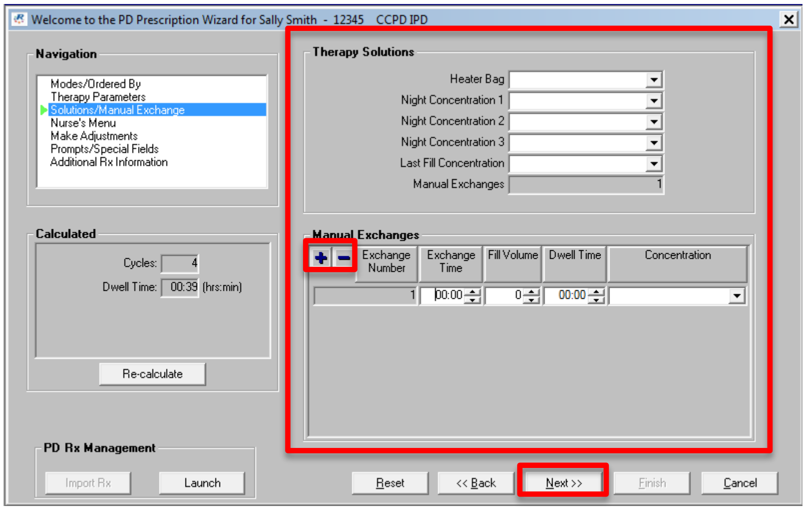
- Therapy Parameters
  - Enter the prescribed Therapy Parameters.
  - Therapy Parameters fields will be dependent upon the prescribed Therapy Mode.
  - Click the **Next** button.



RENALSOFT Software

Step 2: Set-up Prescription (continued)

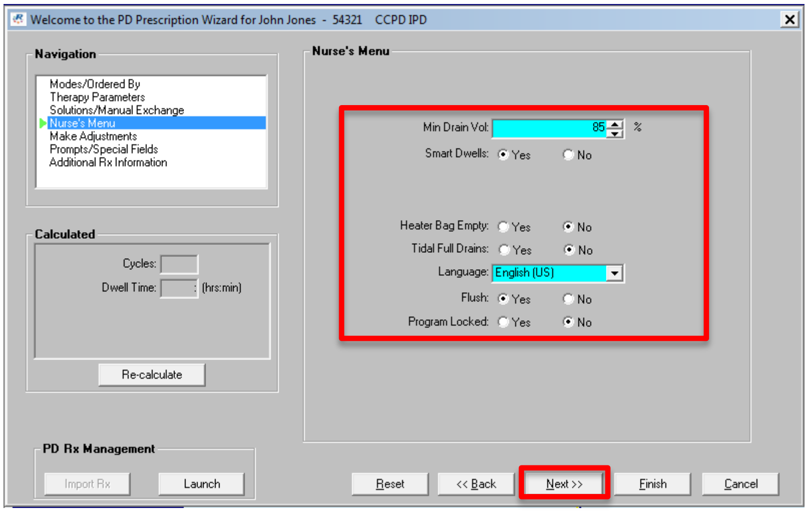
- Solutions/Manual Exchange (optional)
  - Enter Concentration of Therapy Solutions.
  - If Patient has prescribed Manual Exchanges, click the **plus** sign icon for each desired Manual Exchange.
  - Click the **Next** button.



- **Nurse's Menu**
  - Change desired information.

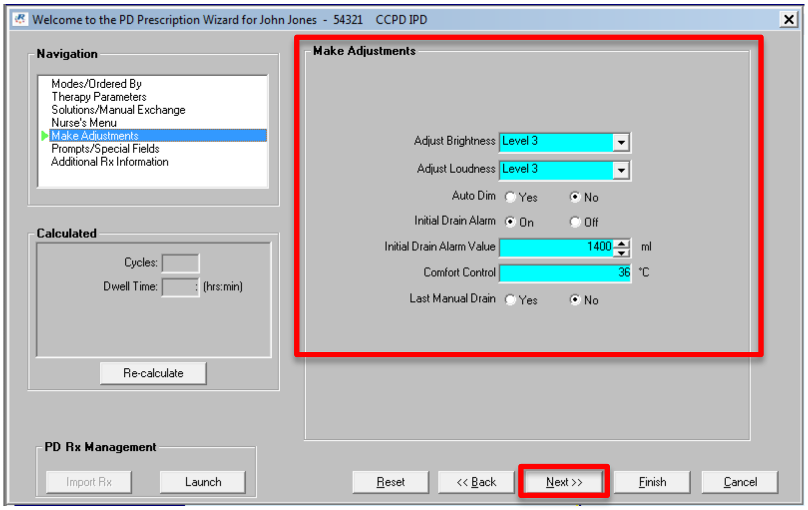
  Note: If Tidal mode is selected, select **Total Full Drains** as **Yes** and then go to the **Therapy Parameters** screen to review and update, as appropriate, the **Full Drains Every** field.

  - Click the **Next** button.

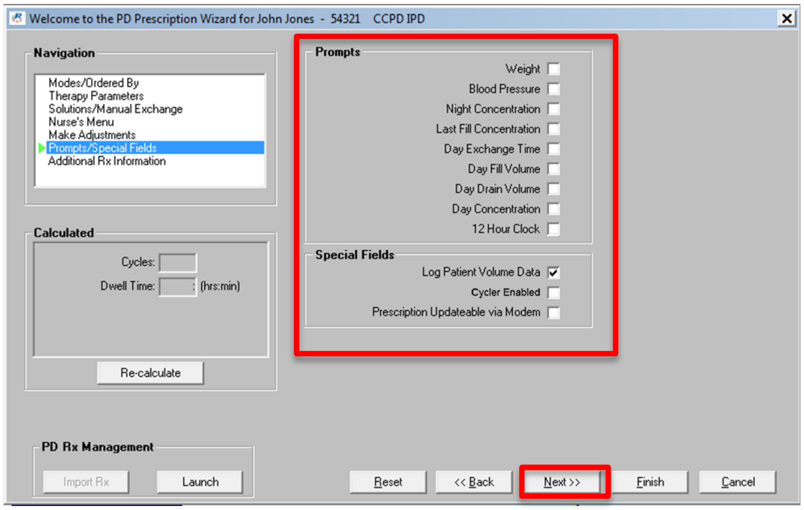


Step 2: Set-up Prescription (continued)

- Make Adjustments
  - Enter required information.
  - Click the **Next** button.



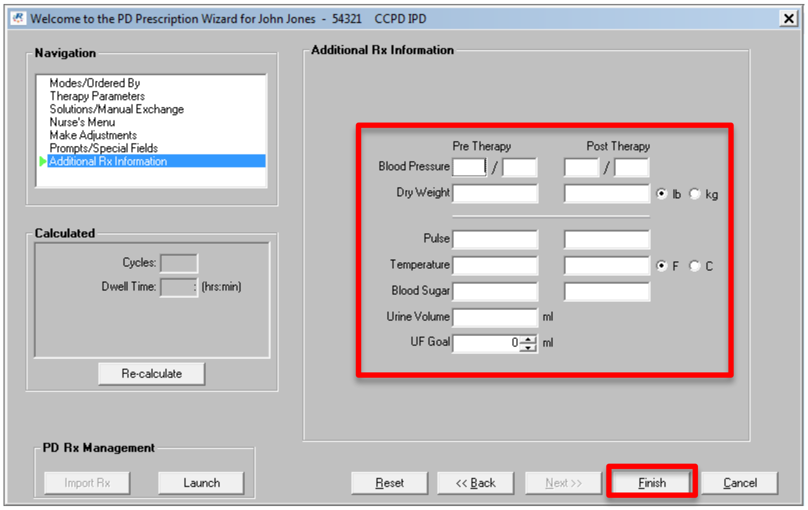
- Prompts/Special Fields
  - Select the desired **Prompts**.
  - Select Log Patient Volume Data checkbox.
  - Click the **Next** button.



RENALSOFT Software

Step 2: Set-up Prescription (continued)

- Additional Rx Information (optional)
  - Enter information such as patient's blood pressure, dry weight, pulse, etc.
  - Night cycles and dwell times will be automatically calculated and displayed.

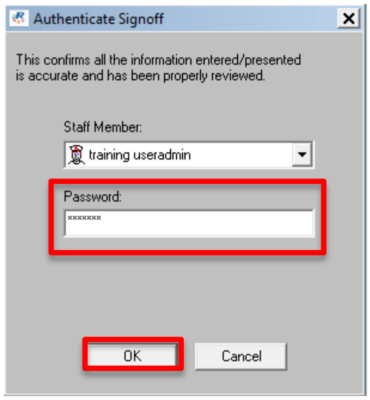


Note: Entering values in **Dry Weight** and **UF Goal** fields enhances reports and graphs.

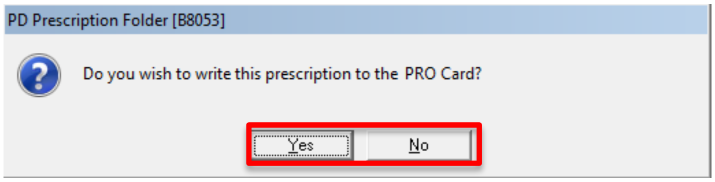
- Click the **Finish** button.
- Enter **Password.**
- Click **OK** to continue.
- Click **Yes** to write the prescription to the PRO Card.

Note: Insert the PRO Card into the PRO Card Adapter and connect the adapter to the computer *before* clicking **Yes.**

- Click **No** to write the prescription to the PRO Card at a later time.



- The PD Prescription Wizard window closes and the PD Prescription Folder displays.

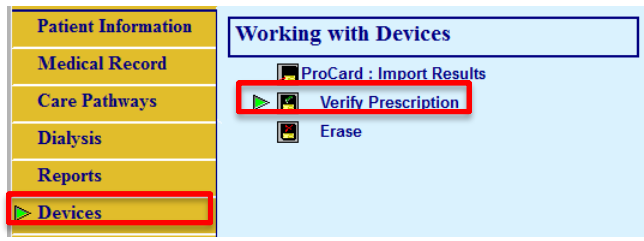


- Click the  button at the bottom of the PD Prescription Folder window to write the prescription to the PRO Card.

Step 3: Verify Prescription Written to PRO Card

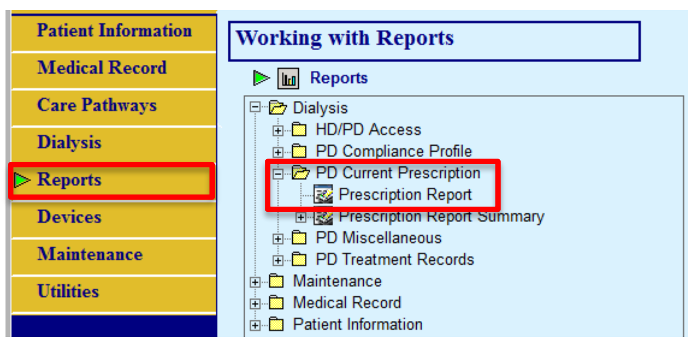
- In the PD Prescription Folder window, click 

- Click **Devices** in the left Navigation menu.
- Click **Verify Prescription** in the Working with Devices menu.



Step 4: Print Report

- Click **Reports** in the left Navigation menu. The **Working with Reports** menu displays.
- Click the **Plus Sign** to expand the **Dialysis** folder.
- Click the **Plus Sign** to expand the **PD Current Prescription** folder.
- Double-click **Prescription Report**.



- Enter the Report Criteria and click the **OK** button. The report displays in the **Prescription Report** window.

For more information about topics in this section, refer to the following Help sections in the RenalSoft Software:

PD → PD Prescription (RX) Folder

Import Information from PRO Card (Converted from PD Link Software)

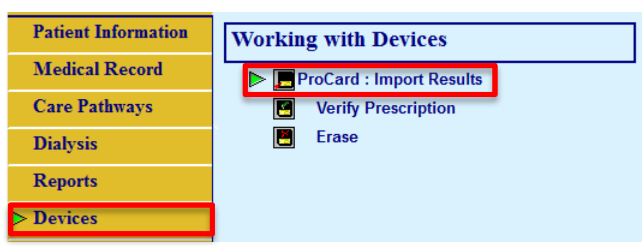
HOME

Step 1: Set-up PRO Card for transfer

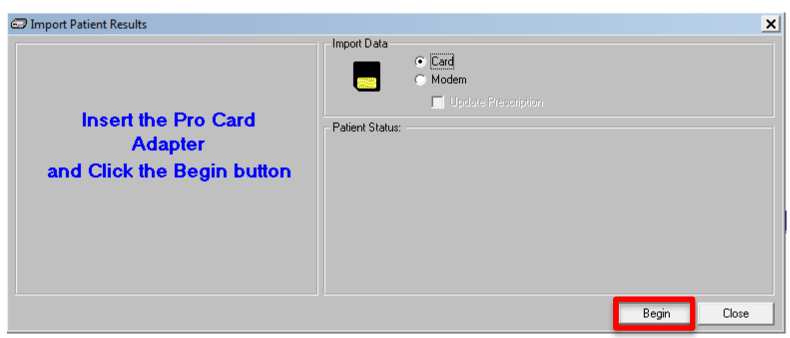
- Insert the patient's PRO Card into the PRO Card Adapter.
- Connect the PRO Card Adapter to the computer.

Step 2: Import Data

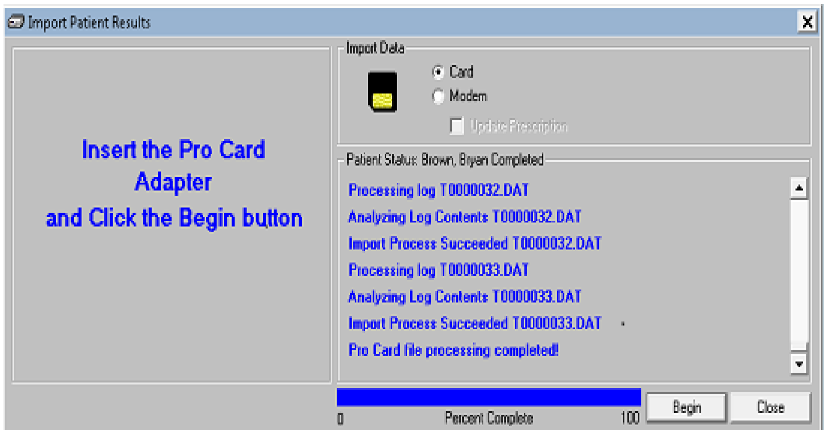
- Click **Devices** in the left Navigation menu.
- Click **ProCard: Import Results** in the **Working with Devices** menu.



- From the **Import Patient Results** window, in the **Import Data** section, select the **Card** radio button.
- Click the **Begin** button.



Step 3: Wait for Import to Complete



- The RenalSoft Software PD import utility will read and process the patient information and treatments found on the card.
- Patient Status will indicate "…….Processing" taking place.
- Once all files have been processed, a confirmation message will display.
- The Import Patient Results Statistics window will display the total number of treatment results successfully imported.

Help

For more information about importing PRO Card data, refer to the following Help sections in the RenalSoft Software:

PD → PRO Card → Importing Results Via PRO Card

Step 4: Match and Merge Patient Records

Converted PD Adequest Software users should Match and Merge patient records after importing data from the PRO Card in order to minimize duplicate records and ensure data integrity.

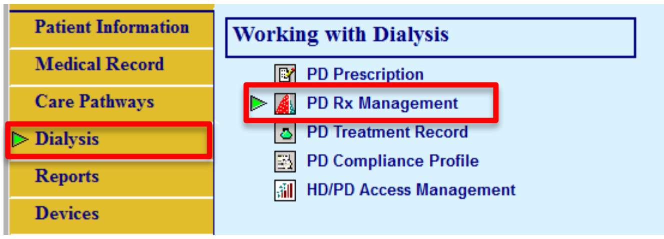
Please see the Match and Merge section for further instructions.

Patient & Prescription Management (Converted from PD Adequest Software)

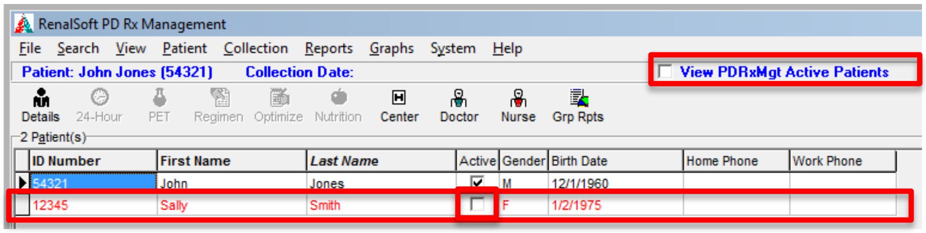
HOME

Step 1: Activate Patients

- Click **Dialysis** in the left Navigation menu.
- Click **PD Rx Management** in the **Working with Dialysis** menu.



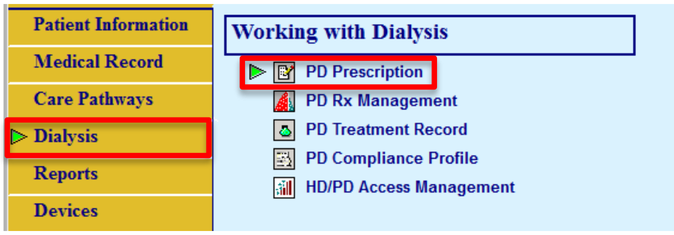
- The **RenalSoft PD Rx Management** window displays.
- In the **Patient** section,
  - Active patients display in black text and have the **Active** field **checked.**
  - Inactive patients display in red text and have the **Active** field **unchecked.**
  - Select the **View PDRxMgt Active Patients** checkbox to hide / show inactive patients.
- To activate an inactive patient, double-click the **Active** checkbox for the appropriate patient record.



Step 2: Import Prescription

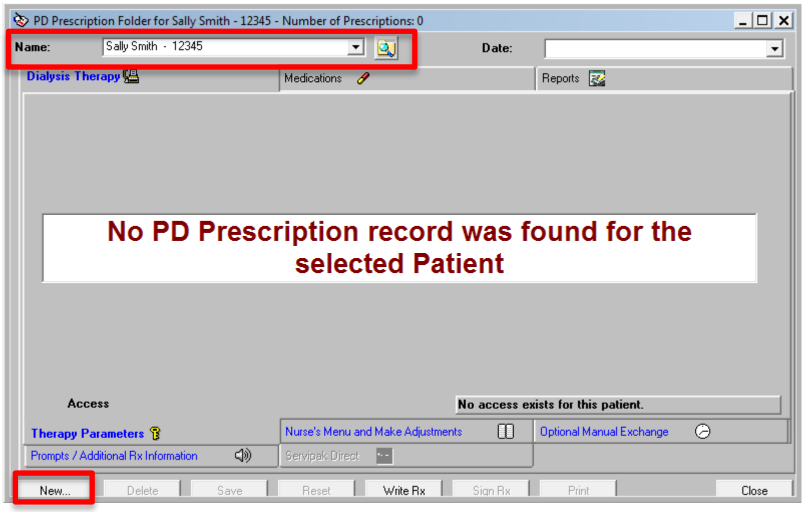
If a patient has a regimen in PD Rx Management, it can be imported to PD Prescription.

- Click **Dialysis** in the left Navigation menu.
- Click **PD Prescription** in the **Working with Dialysis** menu.

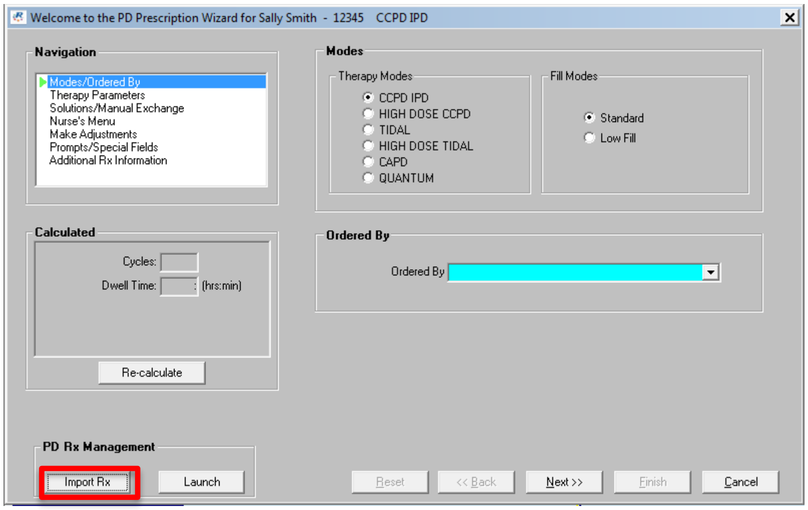


Step 2: Import Prescription (continued)

- The **PD Prescription Folder** window displays.
- Click the **Name** drop-down menu and select the desired Patient from the list.
  - Click the icon to search for Patient records.
- Click the **New…** button to open the **PD Prescription Wizard**.



- In the **Prescription Wizard** window, click the **Import Rx** button to load the prescription.
- The most recent **PD Rx Management** regimen record will be imported into the **PD Prescription Wizard**.
- Follow the steps in Patient Set-up: Add Prescription, starting at Step 2, to make changes and complete the prescription.



Help

For more information about topics in this section, refer to the following Help sections in the RenalSoft Software:

PD Rx Management → What's New in PD Rx Management

PD Rx Management → Viewing Information in RenalSoft PD Rx Management

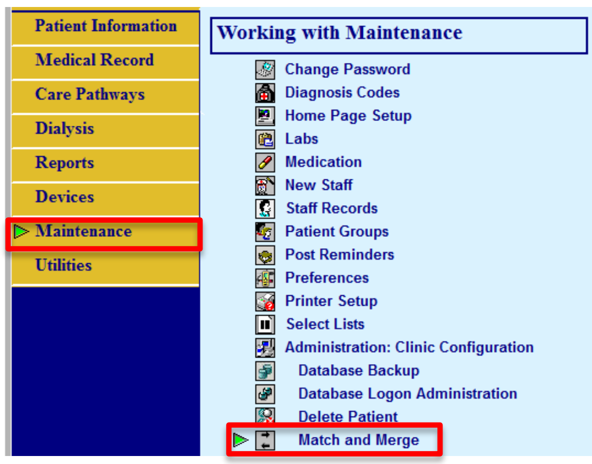
PD → Prescription (RX) Folder → Importing Rx From RenalSoft PD Rx Management

Match and Merge (Converted PD Adequest Software)

[HOME](#)

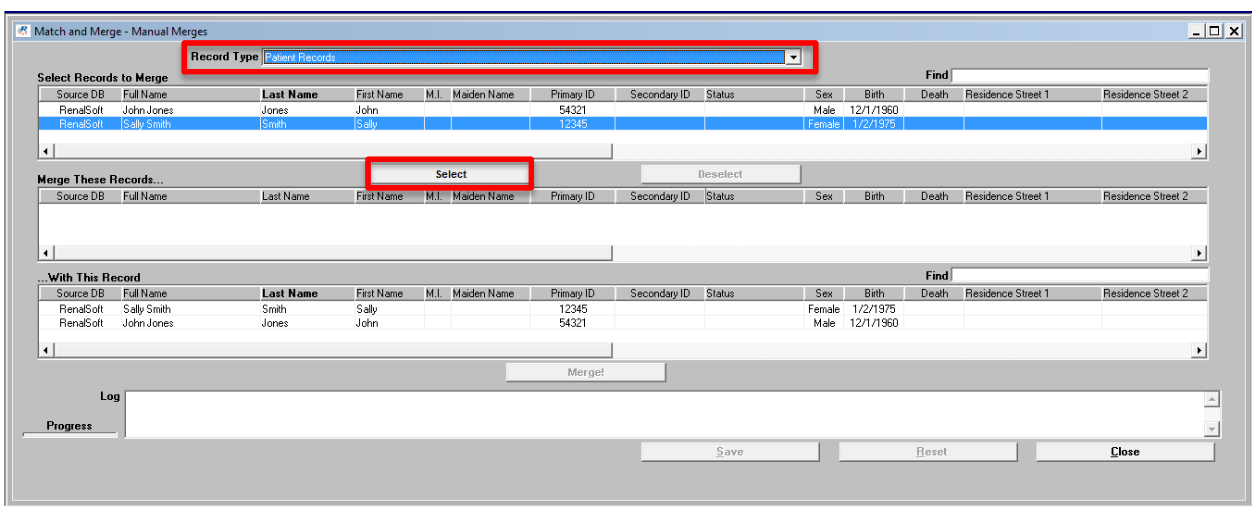
Step 1: Navigate to Match and Merge

- Click **Maintenance** in the left Navigation menu.
- Click **Match and Merge** from the **Working with Maintenance** menu.
- The **Match and Merge – Manual Merge** window displays.
- Click the **Yes** button to back up the database.



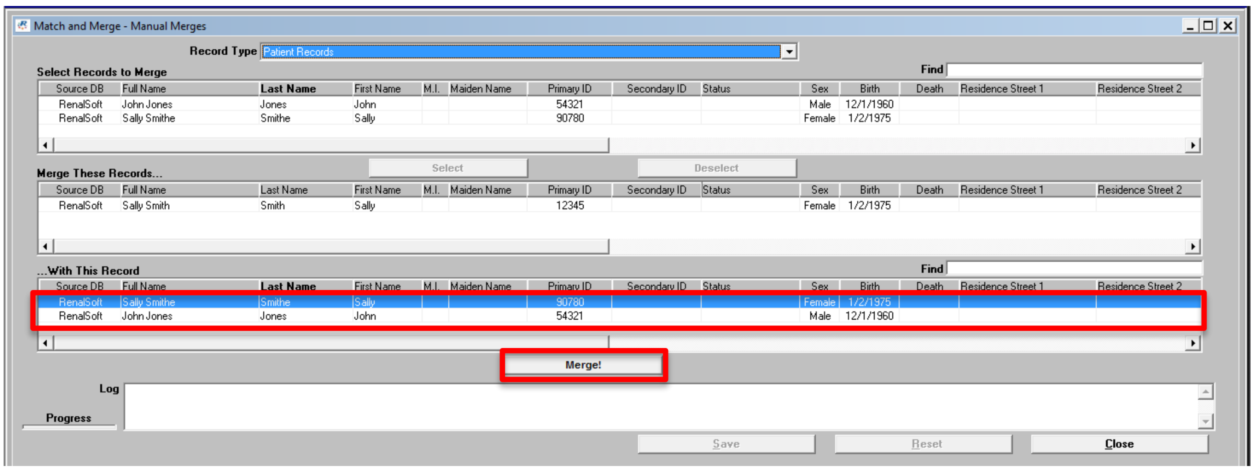
Step 2: Match & Merge

- Select the **Record Type** to merge.
- Locate the record to merge and click the **Select** button.
- The record will move from the **Submit Records to Merge** to the **Merge These Records…** section.



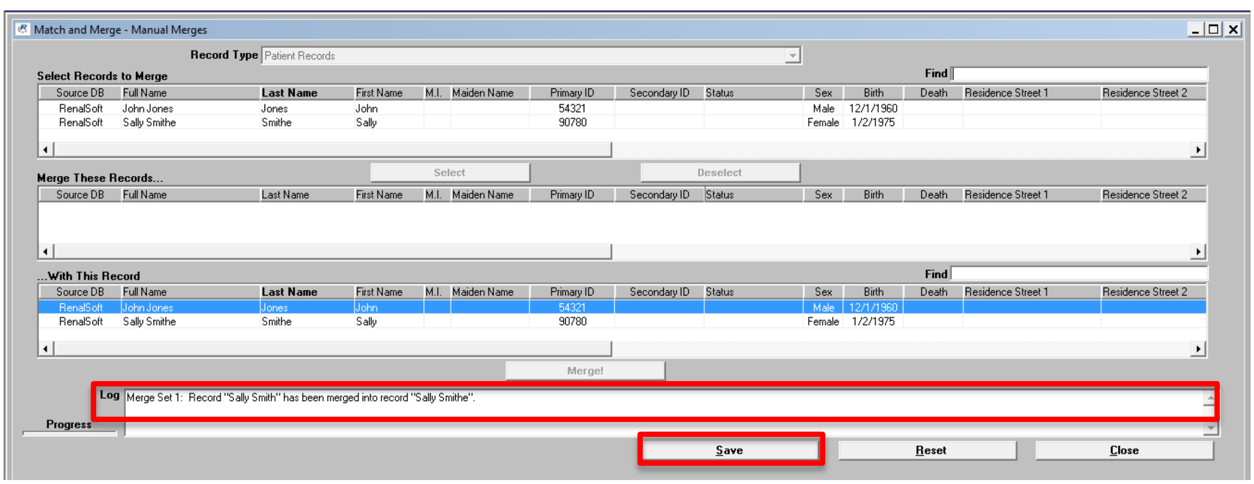
Step 2: Match & Merge (continued)

- Select the record to merge with and then click the **Merge** button.



- When the merge is complete, the **Log** field will be updated with a summary of the merge.
- Click the **Save** button, enter your password, and click the **OK** button to commit changes.

Note: Merged Patient records will be combined into a single record.



Help

For more information about topics in this section, refer to the following Help sections in the RenalSoft Software:

Shared Functions → Administrator Only Functions → Match and Merge Data