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Applicability All Beaumont Hospitals

Point of Care Adding/Updating Operators in Databases

Document Type: Procedure

I. PURPOSE AND OBJECTIVE:

- A. This document describes the steps to enter and update point of care (POC) testing operators into the various POC databases to enable instrument lock-out to maintain compliance with competency assessment completion.
- B. This document is only applicable to areas that are approved for testing under one of the laboratory's Clinical Laboratory Improvement Amendments (CLIA) certificates.

II. PROCEDURE:

- A. Before entering operators for moderately-complex testing (non-waived devices), verify that the operator's highest level of diploma or degree is on file. If the diploma/degree is not available, obtain the primary source verification (PSV). A transcript is acceptable for current students on internship (i.e., CRNA students).
 - 1. If none of these items are on file in the laboratory, do not give the employee instrument access to non-waived devices. Contact the employee and manager and request the educational document(s).
- B. Enter operators for non-waived devices into the College of American Pathologists (CAP) Lab Personnel Licenses spreadsheet on the shared drive. The Manager or designee will upload this document to cap.org periodically for the lab's Medical Director to sign electronically.
- C. QML (All Devices EXCEPT GEM Hemochron 100 and Liat)
 - 1. New Operator
 - a. "Operators" > "Operator" > "New"
 - b. Enter the employee's badge barcode identification (ID) in the "Code" line.
 - c. Enter the "First Name" and "Last Name" on the appropriate lines.

additional testing areas may be added at this step.

- b. Note: BRL OPL (Beaumont Reference Lab Outpatient Lab) staff will be assigned testing privileges at Royal Oak and Troy as they rotate between these locations.

- ii. Press "Save" then "Close".

2. Recertify/Update Operator

- a. "Operators" > "Operator"
- b. Press "Find" and search for the employee by the badge ID or name.
- c. Double-click the employee.
 - i. Note: Update the employee as a trainer, as indicated above, if necessary.
- d. Press "Certify Operator".
- e. Place a check mark next to the device(s) on the "Device Test Type" list.
- f. Press the "Add/Remove" button. This will move the device(s) to the "Operator Certification" box on the right.
- g. Press the arrow next to "Certified On" and select the date the employee was competency assessed.
 - i. Note: QML will automatically lock-out the operator one year from the training date selected. If the operator is a new operator for a non-waived assay (or if it is the semi-annual assessment), press the arrow next to the "Next Override Due for All" and select the appropriate 6-month lock-out date.
- h. Press "Save".

3. Expired Operator

- a. "Operators" > "Operator".
- b. Press "Find" and search for the employee by the badge ID or name.
- c. Double-click the employee.
- d. If the operator is expired and has been identified as someone that is no longer performing POC testing, change the "Status" to "Inactive". Press "Save".
 - i. If the operator will remain active on at least one test, but is expired on one or more other platforms, press "Revoke Certification". Place a check next to the box of the test(s) that are no longer being performed. Press "Save" then "Close".
- e. Add an explanation in the notes by pressing "Add Note", selecting a note or free texting a note, pressing "OK", then "Save".

D. QML (GEM Hemochron and Liat)

1. New Operator

- a. "Operators" > "Operator" > "New"
- b. Enter the employee's badge barcode identification (ID) in the "Code" line.

- c. Enter the "First Name" and "Last Name" on the appropriate lines.
 - i. Note: Add the employee's job title/credentials (e.g. RN, CRNA, etc.) after the first name.
- d. The "Facility / Location" is the primary unit where the employee works.
- e. Add "TL" to the "Title" line for those designated as trainers.
- f. Press "Save".
- g. Press the magnifying glass next to "Operator/Device Parameters".
- h. Select "GH100" or "Liat" from the drop-down list under "Device Type". The employee's badge ID will auto-populate under "Device Code". Enter the employee's badge ID under "Device Password".
- i. Verify that "Change Password" is set to "No", "Authority Level" is set to "4" for the GEM Hemochron and "Supervisor" for the Liat, and "Sample and Record Type(s)" is set to "Patient and QC".
- j. Select "OK".
- k. Press "Certify Operator".
- l. Place a check mark next to "GEM100" or "Liat" on the "Device Test Type" list.
- m. Press the "Add/Remove" button. This will move the device(s) to the "Operator Certification" box on the right.
- n. Press the arrow next to "Certified On" and select the date from the calendar that the employee successfully completed the competency assessment.
 - i. Note: QML will automatically lock-out the operator one year from the training date selected for waived tests or 6 months from an initial non-waived certification.
- o. Press "Save".
- p. Press the "Add Testing Privileges" button.
- q. Expand the "+" next to "GH100" or "Liat". Select the appropriate campus for testing.
 - i. For Royal Oak Liats, expand the "+" next to "RoyalOSOL". Select either "RO SOL OR" or "RO-SOL EC", as appropriate.
- r. Press "Save" then "Close".

E. HemoCue Data Manager System (HemoCue)

1. Log into the HemoCue computer.
2. Open the HemoCue software. The user ID is "supervisor" the password is "supervisor".
3. New Operator
 - a. Navigate to "Operator Lists", choose the testing area, press "New".
 - b. Enter the "Operator ID".
 - c. Verify that the "Permission Level" is set to "USER".
 - d. Change the "Activate" date to the date that the operator completed the competency assessment.

- e. Change the "Deactivate" date to lock-out the user one year after the competency assessment date.
- f. Enter the operator's "Name".
- g. Press "Save" then "OK".
- h. Navigate to "Analyzers" in the left column and highlight the appropriate testing unit.
- i. Navigate to "Analyzer" on the top. Press "Send to group" then "Operator List". Choose the appropriate testing area from the drop down list. Press "Send".

4. Recertify/Update Operator

- a. Navigate to "Operator Lists", choose the testing area, and scroll to find the operator.
- b. Enter the new "Deactivate" date (one year from most recent successful competency assessment).
- c. Press "Save" then "OK".
- d. Navigate to "Analyzers" in the left column and highlight the appropriate testing unit.
- e. Navigate to "Analyzer" on the top. Press "Send to group" then "Operator List". Choose the appropriate testing area from the drop down list. Press "Send".

5. Expired Operator

- a. It is important to delete operators off the HemoCue computer so that the system is not slowed down by unnecessary operators.
- b. Navigate to "Operator Lists", choose the testing area, and scroll to find the operator.
- c. Press "Delete", "Save", "OK", then "OK".

F. QML/Manual Test Entry (MTE) (Urine Dipstick, Urine Pregnancy)/Web Manual Result Entry (WebMRE) (CoaguChek, Nova Xpress, Urine Dipstick, Urine Pregnancy)

1. New Operator/Updated Operator

- a. Follow the QML steps above. Add the additional steps below.
 - i. Certify the operator for the respective MRE test.
 - a. Note: For example, MTE-approved locations should have the R MRE certification, Nova MTE certification and the NovaMTE testing privileges.
 - ii. Set the "QML Application Login" to the operator's ID number.
 - iii. Set the "QML Password" to "poc".
 - iv. Select "Yes" for "Change QML Password Next Login".
 - v. Change the "QML Security" to "Manual Results".
 - vi. Press "Save"
 - vii. Press "Add Testing Privileges".
 - viii. Expand the "+" next to "NovaMTE". Click the box next to the testing

campus.

- a. Note: If the operator works at more than one hospital, additional testing areas may be added at this step.
- ix. Press "Save" then "Close".
- x. Log out of QML. Log back in to QML with the ID "12345" and password "poc".
- xi. Navigate to the "Home" tab. Press "Sync WebMRE".
- xii. Wait for the "Sync Completed" pop-up to appear and select "OK".

2. Change Operator Password

- a. Find and open the operator in QML.
- b. Highlight the current password, indicated by asterisks, on the "QML Password" line.
- c. Change the password to "poc".
- d. Select "Yes" for "Change QML Password Next Login".
- e. Press "Save".
- f. Log out of QML. Log back in to QML with the ID "12345" and password "poc".
- g. Navigate to the "Home" tab. Press "Sync WebMRE".
- h. Wait for the "Sync Completed" pop-up to appear and select "OK".

G. AQUIRE (ABL80, ABL90)

1. New Operator

- a. Log in to AQUIRE.
- b. Navigate to the "Operators" tab.
- c. Press "Add Operator".
- d. Section 1
 - i. Enter the employee's "First Name" and "Last Name".
 - ii. The "User Name" and "Barcode" are the employee's badge ID number.
 - iii. The "Hospital" is the testing location (i.e. "Royal Oak").
 - iv. Select the appropriate "Department".
 - a. "Cath Lab" or "ICU" for the ABL80
 - b. "Perfusion" or "Respiratory Therapy" for the ABL90
 - v. Press "Save".
 - vi. After section 1 is saved, section 2 and 3 will appear below.
- e. Section 2
 - i. The second box will fill in automatically based on the entries from section 1.
- f. Section 3

- i. Change the "Role" to "User".
- ii. Change the "Expiration Date" to 6 months after their competency assessment date for the initial and semi-annual competency assessment to lock out the employee when their competency expires.
- iii. Place a check mark in the "With Access" box.
- iv. Scroll up to Section 1 and press "Save".
- v. Press the "< Operators" button to exit.




g. Press "Push All Operators" to send the new operator to the devices.

2. Recertify/Update Operator

- a. Log in to AQUIRE.
- b. Navigate to the "Operators" tab.
- c. Search for the employee using the search box in the upper right corner.
- d. Double-click on the employee.
- e. Scroll to Section 3. Change the "Expiration Date" as appropriate.
- f. Verify that there is a check mark in the "With Access" box.
- g. Scroll up to Section 1 and press "Save".
- h. Press the "< Operators" button to exit.
- i. Press "Push All Operators" to send the new operator to the devices.

H. Piccolo Xpress

1. New Operator

- a. POC Testing staff are set as administrators in the Piccolos and have the ability to add new operators and update certifications.
- b. Press the "Settings" icon. 
- c. Press "More Settings" icon. 
- d. Enter operator (administrator) ID followed by the password "1955".
- e. Press the "Security Settings" icon. 
- f. Press "Operators".
- g. Select "Add Operator" or "Add Administrator" depending on the level of access designated to the employee.
- h. Enter the employees badge ID and press "Add" to save the entry.

2. Recertify/Update Operator

- a. Follow steps a-f above.
- b. Scroll through the list of operators.
- c. Select the appropriate operator.

- d. Press "Change Expiration". Use the arrow buttons to select the new lock-out date.
- e. Press "Done"

3. Deleting Operator

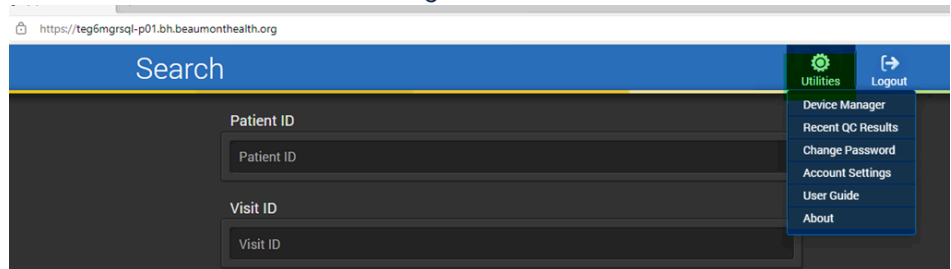
- a. Follow steps a-c under the "Recertify/Update Operator" section.
- b. Press "Delete Operator" to remove the operator from the Piccolo.

I. TEG 6s

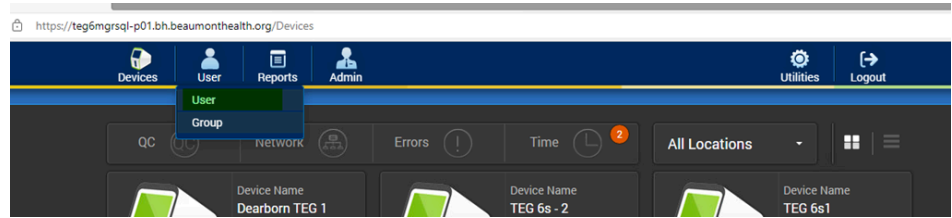
- 1. Users may be granted either "clinician" access to view tracings or "operator" status to view tracings plus access the TEG 6s instruments to perform patient testing.
 - a. All new clinician and operator users must successfully complete the TEG 6s Clinical Training and TEG 6s Clinical Assessment module: <https://hospital.haemonetics.com/login-form?trainingurl=/hospital-trainings> (user: BHS, password: teg75). The new user will submit the certificate of completion to the site-specific POC department. Instrument operators will need to complete TEG 6s training and complete the competency assessment. See the [TEG 6s Hemostasis Testing-Point of Care](#) procedure for more information.
 - b. The new user will create a Service Now request to add the user to the TEG Manager. The user must include the following information in the Service Now request:
 - i. First and last name,
 - ii. Email address,
 - iii. and Corewell Health user ID.
 - c. Upon addition of the application to the user's Citrix page and notification of the ticket completion, the user will inform the site-specific POC staff.



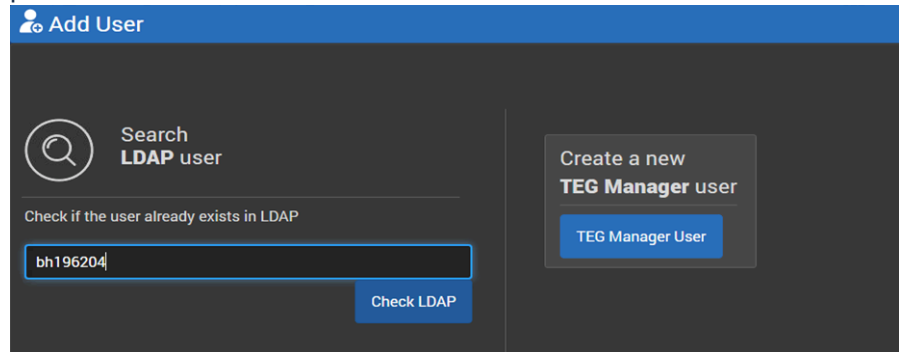
- d. POC staff will create the account in the TEG Manager software. A POC administrator will login to the TEG Manager software.
- e. Select "Utilities" then "Device Manager".



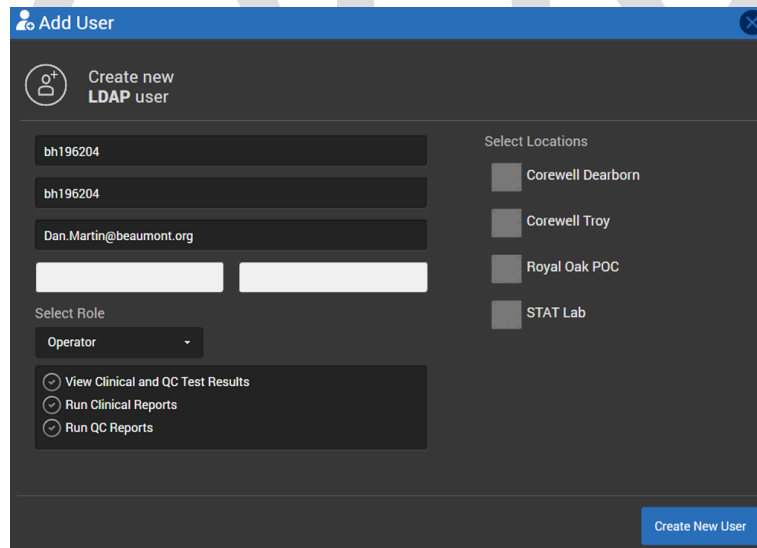
- f. Select "User" then "User".



- g. Press "Add User".
- h. Enter the network ID or last name in the box indicated in the picture below and press the "Check LDAP" button.



- i. When the user is found, click on the name. A new user screen will appear. Select either "Operator" or "Clinician" for the role, then press "Create New User".



- j. When creating an instrument operator, return to step "h" and press the "TEG Manager User" button to create a new account. Then, follow step "i".
- k. Operators at each site will be assigned a site-specific password. This password is embedded in a barcode taped to each instrument.

III. REFERENCES:

- A. Piccolo Xpress Operators Manual, Abaxis Inc., 3240 Whipple Road, Union City, CA, 94587, Revision 1100-7009 2015, www.abaxis.com

- B. [cap.org](#)
- C. [Point of Care Testing Policy](#)

Attachments

[POC Test Name, Acronym, and Databases.pdf](#)

Approval Signatures

Step Description	Approver	Date
CLIA Medical Directors	Muhammad Arshad: Chief, Pathology	1/8/2024
CLIA Medical Directors	Jeremy Powers: Chief, Pathology	1/3/2024
CLIA Medical Directors	John Pui: Chief, Pathology	12/26/2023
CLIA Medical Directors	Vaishali Pansare: Chief, Pathology	12/26/2023
CLIA Medical Directors	Ryan Johnson: OUWB Clinical Faculty	12/19/2023
Policy and Forms Steering Committee Approval (if needed)	Jessica Czinder: Mgr, Division Laboratory	12/19/2023
CP System Medical Director	Ann Marie Blenc: System Med Dir, Hematopath	12/19/2023
	Caitlin Schein: Staff Physician	11/30/2023
Technical Director	Nga Yeung Tang: Tech Dir, Clin Chemistry, Path	11/27/2023
POC Best Practices	Jessica Czinder: Mgr, Division Laboratory	11/24/2023
	Jessica Czinder: Mgr, Division Laboratory	11/24/2023

Applicability

Dearborn, Farmington Hills, Grosse Pointe, Royal Oak, Taylor, Trenton, Troy, Wayne