

## TRAINING UPDATE

**Lab Location:** GEC, SGMC & WAH  
**Department:** Mgmt & QA

**Date Distributed:** 4/5/2018  
**Due Date:** 4/19/2018  
**Implementation:** 4/19/2018

### DESCRIPTION OF PROCEDURE REVISION

<b>Name of procedure:</b>
<b>SmartSolve® (Pilgrim) EDCS: Basic User Functions and Information SGAH.QA852 v3</b>
<b>Description of change(s):</b>
<p>Section 6.3: specify roles that need electronic signature form to match practice</p> <p>Section 6.5: removed step to set EDCS view</p> <p>Section 6-11: updated screen shots to reflect new version of SmartSolve</p> <p>Section 18: updated attachment 2</p> <p><b>This revised SOP will be implemented on April 19, 2018</b></p>

Document your compliance with this training update by taking the quiz in the MTS system.

Electronic Document Control System



Document No.: SGAH.QA852[3]

Title: SmartSolve® (Pilgrim) EDCS: Basic User Functions and Information

Owner: LESLIE BARRETT

Status PRERELEASED

Doc Effective Date: 01-Jan-2099

Next Review Date:

**Review**

**Review:**        DEFAULT DOCUMENT

<b><u>Approver</u></b>	<b><u>Status</u></b>	<b><u>Sign-off Date</u></b>
NICOLAS CACCIABEVE	APPROVED	4/4/18 2:59 pm
CYNTHIA BOWMAN-GHOLSTON	APPROVED	3/30/18 3:08 pm
LESLIE BARRETT	APPROVED	3/30/18 9:51 am

---

Non-Technical SOP

<b>Title</b>	<b>SmartSolve® (Pilgrim) EDCS: Basic User Functions and Information</b>	
<b>Prepared by</b>	Leslie Barrett	Date: 10/29/2013
<b>Owner</b>	Cynthia Bowman-Gholston	Date: 10/29/2013

<b>Laboratory Approval</b>		
<b>Print Name and Title</b>	<b>Signature</b>	<b>Date</b>
<i>Refer to the electronic signature page for approval and approval dates.</i>		
Local Issue Date:		Local Effective Date:

<b>Review</b>		
<b>Print Name</b>	<b>Signature</b>	<b>Date</b>

Document: SGAH.QA852[3] Status: PRERELEASED, Effective: 1/1/2099, Check Version Before Use

Form revised 3/31/00

## **TABLE OF CONTENTS**

1. PURPOSE.....	2
2. SCOPE .....	2
3. RESPONSIBILITY.....	2
4. DEFINITIONS.....	3
5. YOUR SYSTEM RIGHTS AND USER FUNCTIONS.....	4
6. LOGGING IN TO SMARTSOLVE .....	4
7. FORGOT YOUR PASSWORD?.....	5
8. SEARCH/FIND/VIEW/COPY/PRINT A DOCUMENT.....	5
9. VIEW/ACCESS DOCUMENTS OVER THE DEFAULT VIEW NUMBER OF 200 .....	9
10. IMPORTANT NOTES REGARDING DATES ON THE PDF COVERPAGE:.....	10
11. LOGGING OUT OF SMARTSOLVE CORRECTLY.....	11
12. ARCHIVED/EXPIRED DOCUMENTS .....	11
13. ELECTRONIC SIGNATURES.....	11
14. STORAGE .....	12
15. RELATED DOCUMENTS .....	12
16. REFERENCES .....	12
17. REVISION HISTORY.....	12
18. ADDENDA AND APPENDICES.....	12

---

### **1. PURPOSE**

The purpose of this Standard Operating Procedure (SOP) is to describe basic SmartSolve® v9.1 (often referred to as Pilgrim) user functions and provide practical and useful information on how the SmartSolve electronic document control system (EDCS) works.

### **2. SCOPE**

This SOP is intended for use by all SmartSolve Users, Department Document Managers and Approvers at the laboratories of Quest Diagnostics at Germantown Emergency Center, Shady Grove Medical Center and Washington Adventist Hospital.

### **3. RESPONSIBILITY**

**3.1 The Quality Assurance (QA) Department** is responsible for the maintenance and periodic review of this SOP.

**3.2** It is the responsibility of the department **Document Manager** and **department management** to communicate any changes in users and/or user rights, approval staff/matrix to the SmartSolve Local Administrator in a timely manner.

**3.3 All SmartSolve users are responsible for:**

**3.3.1** Using this SOP as a reference, and becoming proficient in the processes described as applicable to their responsibilities and/or needs.

**3.3.2** Contacting the Local SmartSolve Administrator if assistance is needed.

**3.3.3** Adhering to the following requirement:

Copies of documents (either hardcopy or electronic) may NOT be given to anyone off-site, whether or not they are employed by Quest Diagnostics Incorporated. All off-site requests must be directed to the Local SmartSolve Administrator or the QA Department as part of the document control process.

**3.3.4** Printed reference copies of a SOP made from SmartSolve during an employee's shift must be discarded by the end of their shift. The only exceptions are those printed and maintained in the designated binders for SOPs and other documents. Discard documents in the confidential documents shredding bin.

## 4. DEFINITIONS

### 4.1 Controlled Copy

Printed paper copy of the original SOP on SmartSolve made from the PDF file and placed into the department's SOP binder. Obsolete or no longer needed controlled copies are destroyed following current practice for confidential documents.




### 4.2 SmartSolve User Types

**EndUser** – An EndUser has basic system rights that currently include the ability to search, find, view and print currently approved documents in the Adventist Laboratory SOP Repository.

**Approver** – An EndUser who is a member of department/BU management who has been included on one or more document approval routes. Responsible for reviewing, approving, or rejecting a document. Has viewing rights to both SOP and Validation repositories.

**Department Document Manager** – An Enduser who has been assigned additional rights to process new, revised, periodic review, retiring SOPs, and validations for the department in which they work. Manager rights have been assigned in both the SOP and Validation Repositories.

**Local Administrator** – The QA specialist or Business Unit QA Department staff member(s) assigned to perform the duties of document control and SmartSolve System Local Administration. Contact the Local Administrator for:

-  New accounts or status changes
-  User rights/roles – new or changes
-  Technical assistance, questions, training, new system requirements, etc.

### 4.3 Periodic Review (also called Recurring Review (biennial))

All technical and non-technical SOPs must be reviewed and reapproved by the appropriately designated and licensed department director on a periodic basis not to exceed 24 months from the previous reviewed date.

## 5. YOUR SYSTEM RIGHTS AND USER FUNCTIONS

System rights are defined by using Roles and granted by the Local Administrator as directed by individual department management. Roles allow users to access specific individual areas of the system. If a user does not have rights to perform a specific function or access a section of the system, the item will not display in the main navigation menu.

If you do not currently have the user access rights you need for a particular function or process, please contact the Local Administrator, who will assist you in applying for additional rights.

## 6. LOGGING IN TO SMARTSOLVE

**6.1** The main login screen is the first entry point in to SmartSolve Portal. The login performs all of the initial security and licensing verifications for the system.

**6.2** To login into SmartSolve you must have a Quest Network User ID and a login password. If you do not remember them, contact your Supervisor.

**6.3** **Approvers, Document Managers and Administrators:** You must have an *Electronic Signature Password Acknowledgement Form* on file in the QA Department. By signing this form you confirm that your electronic signature password represents your signature and that you understand it is considered a legally acceptable and functionally binding equivalent of your paper-based signature. Even if you currently are not assigned to an approval route you must complete and turn in the form. Contact the Local Administrator if you have not received a copy of the form.

**6.4** Remember: When you exit SmartSolve, always click **Logout** first. Never use only the Windows “X” button to leave SmartSolve.

### 6.5 To log in, do the following:

1. Double-click the SmartSolve icon.



2. The login page appears.



3. In the **Login ID** field, type your Quest network ID. In the **Password** field type your network (not LIS) password. Click the **Sign In** button

**Note:** When you change your network password, your SmartSolve password updates simultaneously. The **Login Password** field is **case-sensitive**. If you attempt to enter a password while the Caps Lock button is on, you will receive an error message.

- The SmartSolve Home Page will appear.
- If you are logging in for the first time you will want to first:  
NOTE: The system will automatically log you out after 20 minutes of inactivity.

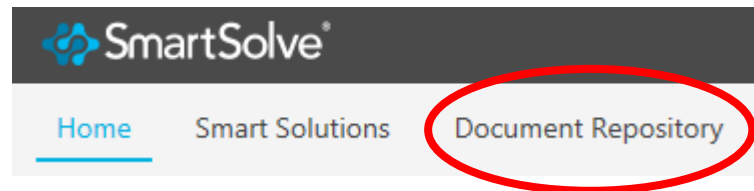
## 7. FORGOT YOUR PASSWORD?

Use SAM (Secure Access Manger) to reset your Quest network password.

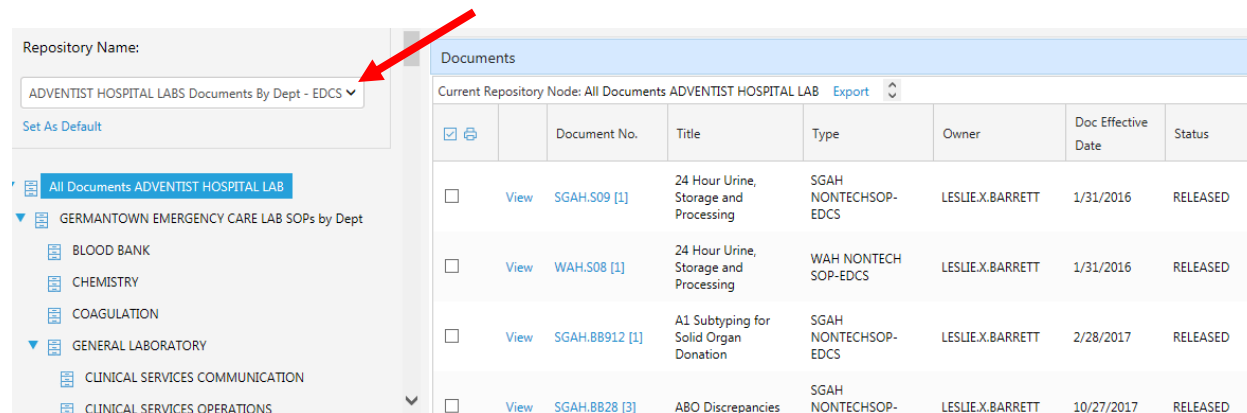
## 8. SEARCH/FIND/VIEW/COPY/PRINT A DOCUMENT

Important note when searching for a document: As of 10/07/2013 (go-live date with SmartSolve), any leading zero's in the version numbers have been dropped (example: version 007 became 7).

**8.1** To view documents, click on **Document Repository** at the top of the Home page.



**8.2** To view SOPs, select the **ADVENTIST HOSPITAL LABS Documents By Dept-EDCS** repository and make this your default. Based on your assigned role(s) the dropdown might show you additional repositories to choose from (i.e., Validations).

A screenshot of the SmartSolve 'Documents' page. On the left, there is a 'Repository Name' dropdown menu with 'ADVENTIST HOSPITAL LABS Documents By Dept - EDCS' selected. A red arrow points to this dropdown. Below the dropdown is a list of repository options, including 'All Documents: ADVENTIST HOSPITAL LAB' and 'GERMANTOWN EMERGENCY CARE LAB SOPs by Dept' with sub-options like 'BLOOD BANK', 'CHEMISTRY', 'COAGULATION', 'GENERAL LABORATORY', 'CLINICAL SERVICES COMMUNICATION', and 'CLINICAL SERVICES OPERATIONS'. On the right, there is a table titled 'Documents' with columns for 'Document No.', 'Title', 'Type', 'Owner', 'Doc Effective Date', and 'Status'. The table contains four rows of document information.

	Document No.	Title	Type	Owner	Doc Effective Date	Status
<input type="checkbox"/>	View SGAH.S09 [1]	24 Hour Urine, Storage and Processing	SGAH NONTECHSOP-EDCS	LESLIE.X.BARRETT	1/31/2016	RELEASED
<input type="checkbox"/>	View WAH.S08 [1]	24 Hour Urine, Storage and Processing	WAH NONTECH SOP-EDCS	LESLIE.X.BARRETT	1/31/2016	RELEASED
<input type="checkbox"/>	View SGAH.BB912 [1]	A1 Subtyping for Solid Organ Donation	SGAH NONTECHSOP-EDCS	LESLIE.X.BARRETT	2/28/2017	RELEASED
<input type="checkbox"/>	View SGAH.BB28 [3]	ABO Discrepancies	SGAH NONTECHSOP-	LESLIE.X.BARRETT	10/27/2017	RELEASED

**8.3** All Adventist Lab (GEC, SGAH and WAH) SOPs will be listed and searchable in the right side of the screen.

**8.4 To view a specific department's SOPs:** In the left side of the screen scroll down to find the appropriate lab location, and then click on the department's name. That department's SOPs will now be listed in the right side of the screen to view and search. Forms are listed in a separate folder near the bottom and are shared across labs.

**Notes:**

- System SOPs shared by multiple sites reside in the Shady Grove Adventist Lab SOP repository.
- The subfolders (called categories) under a department name will be populated as SOPs are assigned a category by the department Document Managers. This is just a secondary viewing choice. SOPs will always be viewable at the **All Documents** and the **Department** levels.
- Lab and department folders can be compressed by clicking the down arrow or expanded by clicking the up arrow.

**8.5 On the right side of the screen you can** Click a column header to sort the documents alphabetically or numerically depending upon the contents of that column.

Documents							
Current Repository Node: GERMANTOWN EMERGENCY CARE LAB SOPs by Dept <a href="#">Export</a>							
<input checked="" type="checkbox"/>		Document No.	Title	Type	Owner	Doc Effective Date	Status
<input type="checkbox"/>	<a href="#">View</a>	GEC.BB10 [0]	ABO/RH QUALITY CONTROL	GEC NONTECH SOP-EDCS	LESLIE.X.BARRETT	6/17/2013	RELEASED
<input type="checkbox"/>	<a href="#">View</a>	AG.F252 [2]	ABO/RH QUALITY CONTROL FORM GEC	GECSGAHWAH FORM-EDCS	LESLIE.X.BARRETT	6/2/2015	RELEASED
<input type="checkbox"/>	<a href="#">View</a>	GEC.BB11 [0]	ABO/RH TYPING IN THE GEC. LABORATORY	GEC TECH SOP-EDCS	LESLIE.X.BARRETT	6/17/2013	RELEASED
<input type="checkbox"/>	<a href="#">View</a>	AG.F182 [4]	ADVIA Centaur CP Maintenance Log	GECSGAHWAH FORM-EDCS	LESLIE.X.BARRETT	8/1/2016	RELEASED
<input type="checkbox"/>	<a href="#">View</a>	AG.F101 [4]	AFS-8(D) Daily Maintenance Log - System Readings	GECSGAHWAH FORM-EDCS	LESLIE.X.BARRETT	3/29/2017	RELEASED
<input type="checkbox"/>	<a href="#">View</a>	GEC.BB08 [0]	AGGLUTINATION REACTION GRADING	GEC NONTECH SOP-EDCS	LESLIE.X.BARRETT	6/17/2013	RELEASED

Click the printer icon (see **blue arrow** in above screen shot) to **display all SOPs in a list** to scroll through, rather than do page, by page, by page (**red arrow**).

[Smart Document].Title    Contains

Reset   Add   1   Search Rows   Search


1 2 3 4 5 6 7 8 9 10 ...

You can also **export the list** (or any search result) into an Excel document by clicking on the **[Export]** link (see **green arrow** in above screen shot).

**8.6 Scroll down to** the bottom of the right side of the screen to use the **Search** function to look for a specific SOP.



Option 1: Type in the word for which you want to search. Click the Search button. Your result will appear above the Search area.

Option 2: Leave the “Title” field blank and click on  to add another row. This second row is defaulted to search based on a Document Number. You can change the default to ‘Contains’. Your result will appear above the Search area.

## 8.7 Full Text Search

1. In your chosen repository, scroll to the bottom of the department listing and click on **Full Text Search**.

2. For Search Name choose the appropriate site (GEC – EDCS, SGAH – EDCS or WAH – EDCS)
3. Make your choices and then click Search.

## 8.8 View/Copy/Print

### IMPORTANT!!!

- Use your department’s existing SOP manuals to view a printed copy of a SOP.
- If you print a copy of a SOP from SmartSolve for use at your workstation you **MUST** discard it in a confidential shredding bin by the end of your shift.
- Copies of documents (either hardcopy or electronic) may **NOT** be given to anyone off-site, whether or not they are employed by Quest Diagnostics Incorporated. Refer to section 3.3 for additional details.

1. To view a document click on the **View** icon. The PDF will open. The PDF includes the cover page (approvals and Local Effective Date) and the SOP. You can copy or print at this time.

Documents							
Current Repository Node: GENERAL LABORATORY <a href="#">Export</a>							
<input checked="" type="checkbox"/>		Document No.	Title	Type	Owner	Doc Effective Date	Status
<input type="checkbox"/>	<a href="#">View</a>	SGAH.L899 [0]	Add-on Lab Orders for Pathology Specimen on WAH Patient	SGAH NONTECHSOP-EDCS	LESLIE.X.BARRETT	3/5/2015	RELEASED
<input type="checkbox"/>	<a href="#">View</a>	SGAH.L26 [5]	Attendance Policy	SGAH NONTECHSOP-EDCS	LESLIE.X.BARRETT	4/29/2016	RELEASED
<input type="checkbox"/>	<a href="#">View</a>	SGAHQDHOS703 [1.2]	Autoverification Policy for Hospital Based Labs	SGAH CORP NTECH-EDCS	LESLIE.X.BARRETT	8/15/2016	RELEASED
<input type="checkbox"/>	<a href="#">View</a>	SGAH.L42 [1]	BINDER FORMAT STANDARDS	SGAH NONTECHSOP-EDCS	LESLIE.X.BARRETT	7/24/2012	RELEASED
<input type="checkbox"/>	<a href="#">View</a>	SGAH.L977 [0]	Blood and Body Fluid Exposure Orders	SGAH NONTECHSOP-EDCS	LESLIE.X.BARRETT	11/1/2017	RELEASED

2. To view any Attachments associated with a SOP, click on the Document Number. When the next window opens, you will see the Profile page. **Attachments** will be on the left side of the screen. The number of attachments will be shown in parenthesis (1). Click on **Attachments** to view the list. Click on the attachment’s file name to open it. Once open, you will be able to copy or print it.

Action			View Document	CheckIn
<input checked="" type="checkbox"/>	<input type="checkbox"/>	Description	File Name	
<input type="checkbox"/>	<input type="checkbox"/>	IT20.A LIS Change Request	<a href="#">IT20.A LIS change request_031314.xls</a>	
<input type="checkbox"/>	<input checked="" type="checkbox"/>	Show Top 1 / 1		
Search				

3. Most of the Adventist Laboratory forms are maintained as separate documents and found within the forms folder. These are most easily identified as beginning with the prefix “AG.F.” To view those associated with a SOP, click on the Document Number.

Document: SGAH.QA852[3] Status: PRERELEASED, Effective: 1/1/2099, Check Version Before Use

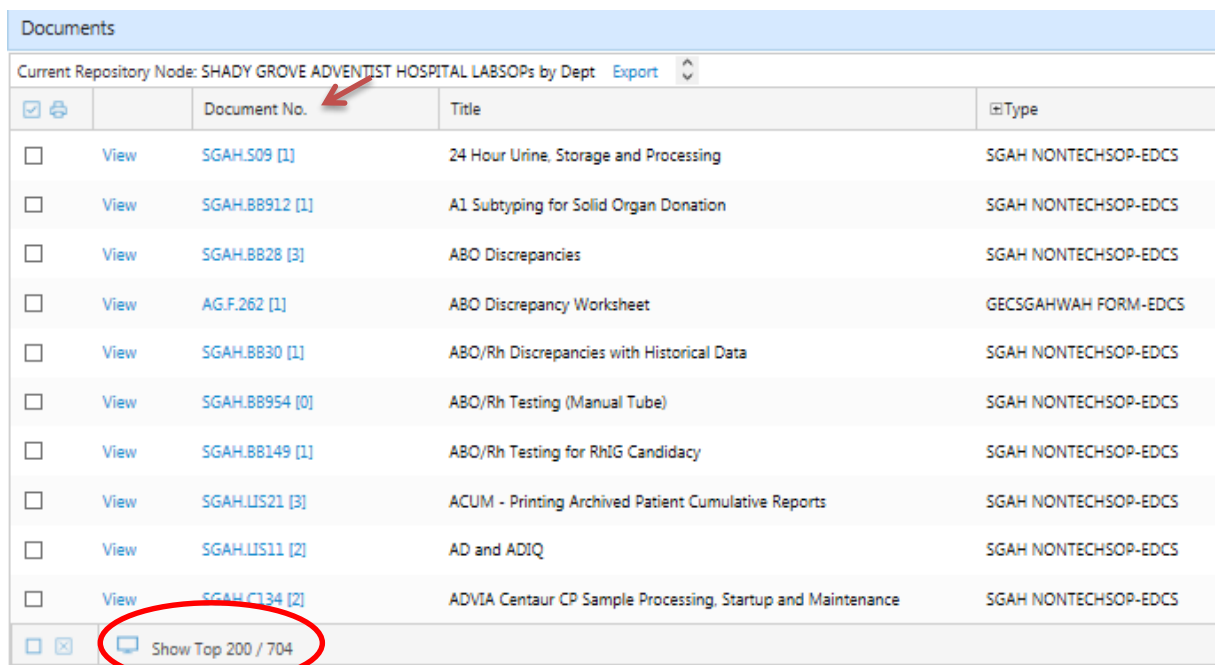
Form revised 3/31/00

When the next window opens, you will see the Profile page. **References** will be on the left side of the screen. Click on **References** to view the list. Click on the file name to open it. Once open, you will be able to copy or print it.

## 9. VIEW/ACCESS DOCUMENTS OVER THE DEFAULT VIEW NUMBER OF 200

SmartSolve will only make the first 200 documents viewable/accessible of any department list or search result. If your list or search result contains more than 200 documents follow the example below steps to view/access the remaining documents.

1. Navigate to the appropriate document repository. The information below shows a total of 704 documents and the system loaded 200. To view/access the remaining ones follow the next steps.



Documents				
Current Repository Node: SHADY GROVE ADVENTIST HOSPITAL LABSOPs by Dept <a href="#">Export</a>				
<input type="checkbox"/>		Document No.	Title	Type
<input type="checkbox"/>	<a href="#">View</a>	SGAH.S09 [1]	24 Hour Urine, Storage and Processing	SGAH NONTECHSOP-EDCS
<input type="checkbox"/>	<a href="#">View</a>	SGAH.BB912 [1]	A1 Subtyping for Solid Organ Donation	SGAH NONTECHSOP-EDCS
<input type="checkbox"/>	<a href="#">View</a>	SGAH.BB28 [3]	ABO Discrepancies	SGAH NONTECHSOP-EDCS
<input type="checkbox"/>	<a href="#">View</a>	AG.F.262 [1]	ABO Discrepancy Worksheet	GECSGAHWAH FORM-EDCS
<input type="checkbox"/>	<a href="#">View</a>	SGAH.BB30 [1]	ABO/Rh Discrepancies with Historical Data	SGAH NONTECHSOP-EDCS
<input type="checkbox"/>	<a href="#">View</a>	SGAH.BB954 [0]	ABO/Rh Testing (Manual Tube)	SGAH NONTECHSOP-EDCS
<input type="checkbox"/>	<a href="#">View</a>	SGAH.BB149 [1]	ABO/Rh Testing for RhIG Candidacy	SGAH NONTECHSOP-EDCS
<input type="checkbox"/>	<a href="#">View</a>	SGAH.UIS21 [3]	ACUM - Printing Archived Patient Cumulative Reports	SGAH NONTECHSOP-EDCS
<input type="checkbox"/>	<a href="#">View</a>	SGAH.UIS11 [2]	AD and ADIQ	SGAH NONTECHSOP-EDCS
<input type="checkbox"/>	<a href="#">View</a>	SGAH.C134 [2]	ADVIA Centaur CP Sample Processing, Startup and Maintenance	SGAH NONTECHSOP-EDCS

2. Click on the **Document No.** column header to sort by document number (low to high).
3. When sorted from low to high, click on the '**...**' after page 10 (seen below the search criteria section).

[1](#) [2](#) [3](#) [4](#) [5](#) [6](#) [7](#) [8](#) [9](#) [10](#) **...**

Then click on page 20 to get to the final page for the first 200.

**...** [11](#) [12](#) [13](#) [14](#) [15](#) [16](#) [17](#) [18](#) [19](#) **20**


4. Click on **ADD** to add a **Document No.** search line, change the middle column to **Is Greater Than**, and type in the last document number. Click on **Search**.
5. This will return a result list containing the remaining documents.





## 11. LOGGING OUT OF SMARTSOLVE CORRECTLY

### IMPORTANT NOTE:

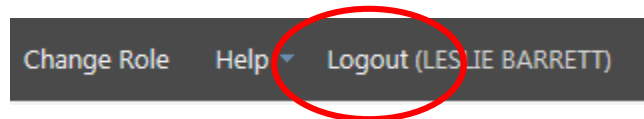
It is **very important** that you use the **correct Logout method**.

**Do not use the X**  in the upper right corner of the window to Logout.

Only use the  icon to close a pop-up window or this 'X'  to close a specific tab.



**11.1** Always Logout of SmartSolve by clicking on **Logout**.



**11.2** If you are using a shared desktop, always log off of the network.

## 12. ARCHIVED/EXPIRED DOCUMENTS

12.1	Procedure to view archived documents
1.	You will not be able to view archived documents unless you have been assigned those rights.
2.	Login to SmartSolve.
3.	Click on the <b>View Document</b> icon.
4.	For <b>SOPs</b> choose the <b>ADVENTIST HOSPITAL LAB Documents By Dept- Dept Mgr-EDCS</b> . For <b>Validations</b> choose the <b>ADVENTIST HOSPITAL LAB Validations By Dept- Dept Mgr-EDCS</b> repository.
5.	Scroll all the way down and click on <b>Archived Documents</b> .
6.	Search for your document as described in section 8.6.
Note	Although all documents were migrated to the new EDCS SmartSolve system the approval history for all migrated documents was not. Refer to MasterControl for all approval history prior to 10/07/2013. Is you need assistance, contact the Local Administrator.

## 13. ELECTRONIC SIGNATURES

**13.1** Electronic signatures within the SmartSolve application are considered a legally acceptable and functionally binding equivalent of paper-based signatures.

**13.2** Sharing of passwords among users is strictly prohibited in order to maintain the security and integrity of electronic signatures.

**13.3** Staff is fully accountable and responsible for actions initiated under their electronic signatures.

**14. STORAGE**

There is electronic storage in SmartSolve of all draft, released and archived documents. The system is based on network servers that are backed up daily.

**15. RELATED DOCUMENTS**

MasterControl: Basic User Functions and Information, QA procedure  
 Document Control, QA procedure

**16. REFERENCES**

SOP CHA QM.721v2, *SmartSolve® (Pilgrim) EDCS: Basic User Functions and Information*

**17. REVISION HISTORY**

Version	Date	Reason for Revision	Revised By	Approved By
0	10/13/15	Section 2: Remove Nichols Institute Section 4.2: Remove references to Chantilly BU Section 6.5: Update instruction to set repository selection as the default view. Section 9: add instructions to view/access documents if search contains more than the default of 200 documents.	L Barrett	C Bowman-Gholston
1	10/5/17	Header: add other sites Section 8.4: add note for system SOPs	L Barrett	C Bowman-Gholston
2	3/29/18	Section 6.3: specify roles that need electronic signature form to match practice Section 6.5: removed step to set EDCS view Section 6-11: updated screen shots to reflect new version of SmartSolve Section 18: updated attachment 2	L Barrett	C Bowman-Gholston

**18. ADDENDA AND APPENDICES**

(located as Attachments on the document Profile)

1. Electronic Signature Password Acknowledgement Form
2. EndUser Instructions (Pamphlet format)