

Quick Step Guide for Admin, Help Desk, Superuser,

To log in:

After accessing Cardio Server, type a *Username* and *Password* into the appropriate fields, remembering they are case sensitive. Change the domain if necessary. Select the **Enter** button.

To view/search studies:

1. Set filters as desired.
2. Select the appropriate *Search By* field.
3. Enter appropriate information in *Search* box and select **Find**.
4. Open the study by selecting (*clicking once*) the patient *Name* or *Patient ID*.

Study Status

Preliminary: Study has not been reconciled to an order. If no orders interface exists, the patient demographics must be verified manually and the study promoted. If using orders, the patient demographics did not match the information on the order and the study must be manually reconciled to the order and promoted.

Unconfirmed: Patient demographics have been verified or the study has been reconciled with an order. The study is ready to be interpreted and *Confirmed*.

Confirmed: Study has been interpreted and electronically signed.

Read: Study has a preliminary interpretation and has been marked as *Read*, awaiting final confirmation.

Stored: Study has been migrated from another ECG management system or study does not require interpretation within Cardio Server, e.g., stress echo or nuclear stress.

Trash: Study has been selected for deletion and removed from the clinical workflow.

Reconciliation of studies to orders is based on the following fields imported from the acquisition devices:

- Last name
- First name
- Patient ID
- Date of service

To manually reconcile a study to an order (See *Reconciliation of Orders to Studies in the Table of Contents.*):

1. Open the **Inbox** to the *Preliminary* status and select the appropriate study.
2. Select the **Orders** tool tab, if not the default. Select the **By ID** or the **By Name** button to search for an order that matches the study's *Pat ID* or *Last Name*.
3. A pop-up window will appear with a list of open orders that match the search criteria. If no orders appear in the list, select **Clear** to delete the search criteria and select **Find** to list all open orders.
4. Find the correct order and select the **Select** button at the left.
5. Cardio Server will return to the ECG screen and populate the order column with the *Name* and *ID*.
6. Select **Match** next to each field that does not match the order information. Cardio Server will update the study. The *Study* column will not be updated until the study is saved.
7. Select **Save**.
8. Select **Promote**. This moves the study to the *Unconfirmed* status so it is available for interpretation.

To Unlink and Order from a Study:

1. Open the **Inbox** and select the appropriate study.
2. Select **Unlink Order**.
3. Selecting **Unlink Order** displays a warning message requiring confirmation on unlinking the order and study.
4. Select **OK**. The study will be placed in *Preliminary* status once it is unlinked.

To edit study participants, *Study Site*, or *Study Location* (fields located above the *Interpretation* box):

Select appropriate *Reading MD*, *Requesting Provider*, *Fellow*, *Technician*, *Study Site*, and *Study Location* using the drop-down menu for each item; select **Save**.

To print an ECG (See *Printable Version and Print Cover in Table of Contents.*):

1. Open the ECG by selecting (*clicking once*) the patient *Name* or *Patient ID*.
2. Select **Printable Version** to print demographics, interpretation, and tracing; or.
3. Select **Print Cover** to print demographics and interpretation; select printer icon.
4. Verify that *Page Scaling* is set to *None* or *Actual Size*. Select **OK** or **Print**.

To print a *Previous* ECG in the lower, left window:

1. Select the desired date and time tab of the *Previous* ECG.
2. Select **Print** at the top, right corner of the *Previous* ECG window.
3. Select the printer icon.
4. Verify *Page Scaling* is set to *None* or *Actual Size*. Select **OK** or **Print**.

To print non-ECG modalities:

1. Open the study by selecting (*clicking once*) the patient *Name* or *Patient ID*.
2. Select **Print Cover** to print the patient demographics and the physician interpretation.
3. Select **View Extended** to print the study without physician interpretation.
4. Select printer icon. Select **OK** or **Print**.

To print studies from the **Previous** tool tab in the lower, right window:

1. Select the desired date and time tab of the study.
2. Right-click on the study, and select *Print* to open the printer dialog options; or
3. Print only the interpretation page by selecting the date and time tab again.
4. Select the printer icon.
5. Verify *Page Scaling* is set to *None* or *Actual Size*; select **OK** or **Print**.

Admin users and Superusers: To run management reports (*See Reports in the Table of Contents* or refer to the 5.2 Quick Reference Guide for Reports.)

To Delete a study:

1. A study must be in the preliminary or trash status to be deleted.
2. Open the study.
3. Select **Delete**. If a study is linked to an order, it must be unlinked before deleting. A message will display, "*This study cannot be deleted because it is linked to an order. Unlink first.*" Select **OK**, to unlink the order.
4. Select **Yes, Delete this Report** or **Cancel Deletion**. If a study is linked to an order, it must be unlinked before deleting.

NOTE: A deleted report is **NOT RECOVERABLE**.