PURELL SMARTLINK™ OBSERVATION SYSTEM

User Guide

Version 6.0, April 2021

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For questions, please contact smartlinksupport@gojo.com

OBSERVATION REPORTS

The OBV Reports tab is where you can view the data collected from the PURELL SMARTLINK™ Observation System App.

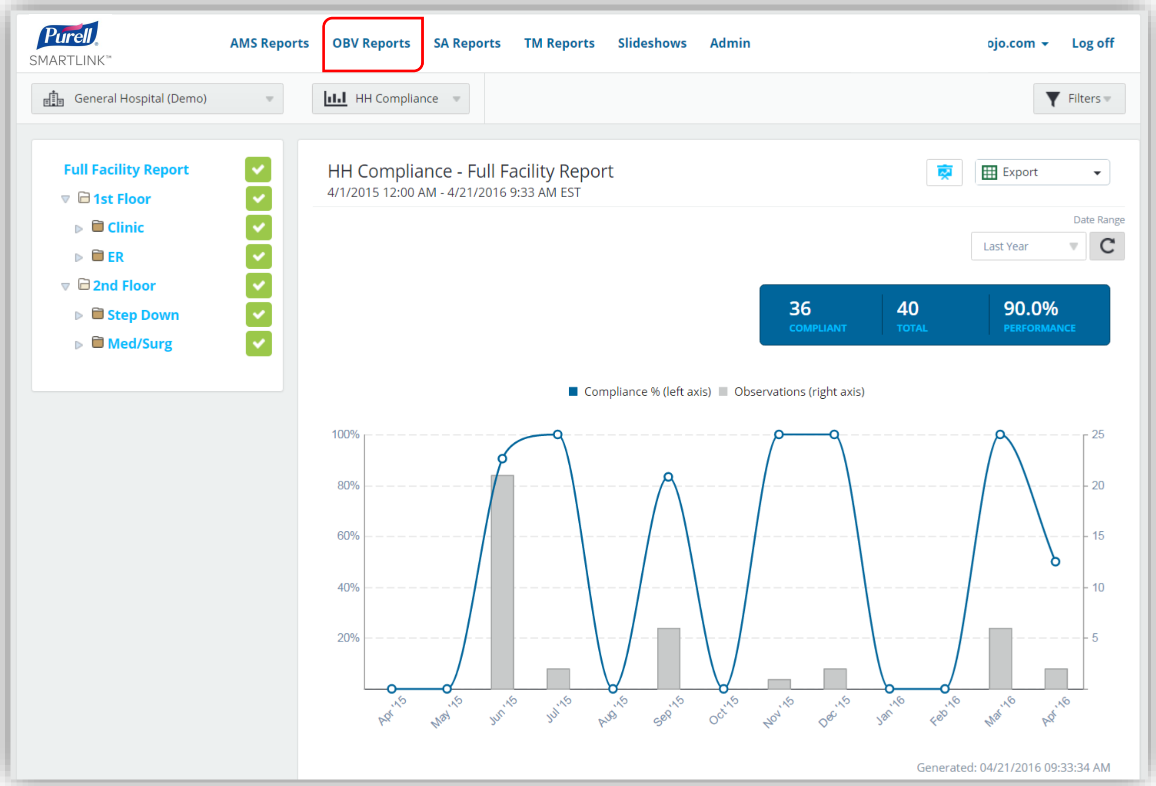
You will use this tab to:

✓ View all the system reports:

- HH Activity History
- HH Compliance
- HH Job Role and Moments
- HH Job Role and Outcome
- HH Job Role and Unit
- HH Moments
- HH Observer
- HH Quick Notes
- PPE Compliance

✓ Customize subsets of data by date range, locations, job roles, moments, and shifts

✓ Export data



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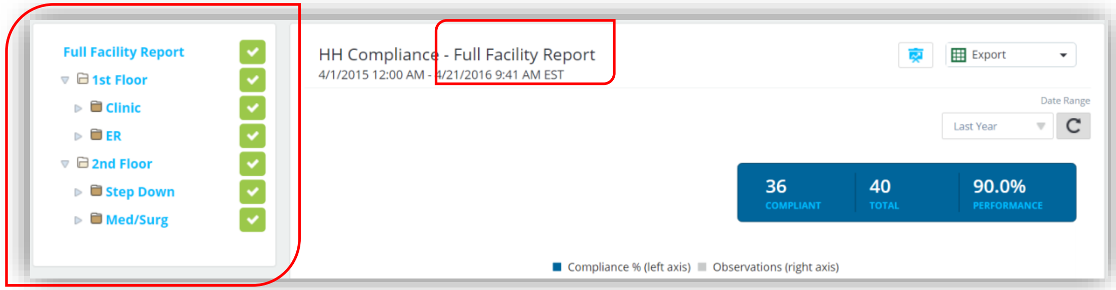
OBSERVATION REPORTS

FILTERING BY LOCATION

Every monitored floor, unit, and room is shown in a report unless it is manually removed. Notice the title of the graph reads “Full Facility Report” when all locations are selected.

✓ To remove a floor, unit, or room from the report, click on the green checkmark next to it’s name. The box will turn gray to indicate it has been unselected

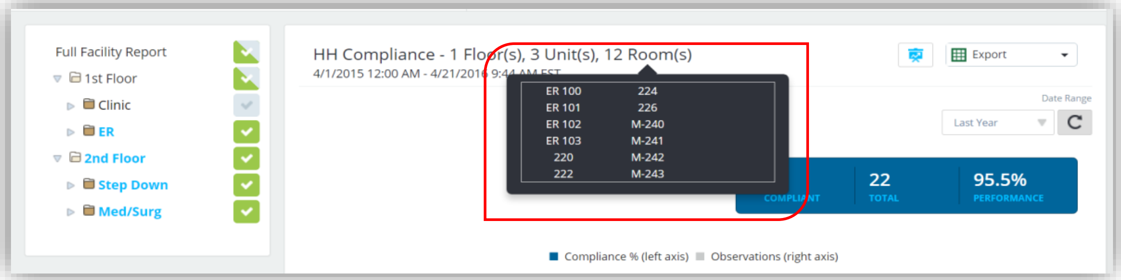


* Notice: Once removed, the text will change from **BLUE** (active) to **BLACK** (removed)

The title of the graph will change to reflect the new scope:

✓ Hover over the title of the graph to view the specific rooms, units, and floors included in the report

✓ To reselect all floors, units, and rooms click the “Full Facility Report” checkmark until all boxes are green



* **NOTE:** This is an option on ALL reports

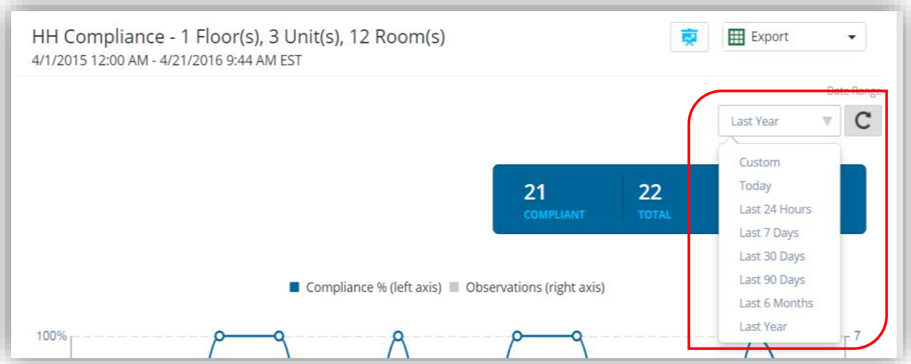
OBSERVATION REPORTS

FILTERING BY DATES

Data can be viewed over a customized period of time or during a preselected period of time available in the drop-down menu under “Date Range”.

✓ To view a preselected period of time, click on the drop down menu and choose one of the following:

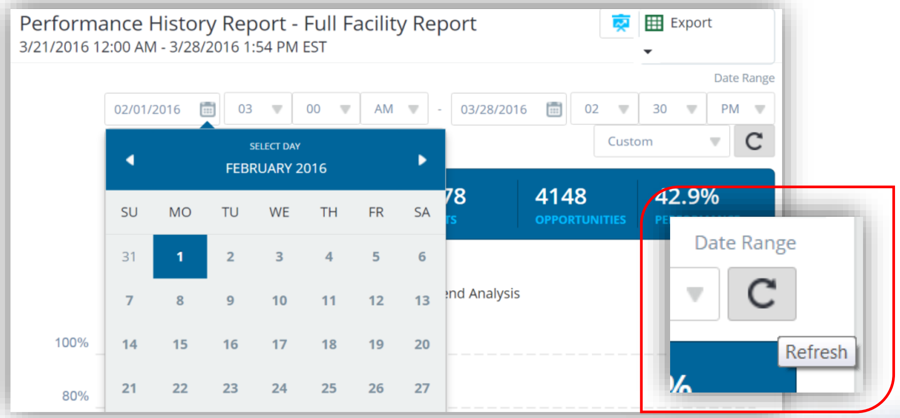
- Today
- Last 24 Hours
- Last 7 Days
- Last 30 Days
- Last 90 Days
- Last 6 Months
- Last Year



✓ The report will automatically refresh

✓ To view a customized period of time, choose “**Custom**” from the drop down menu

- Drop down boxes for dates and times will appear.
- Choose the customized time frame you would like to view in the report
- <u>You will need to click the REFRESH arrow on the right hand side of the screen in order for the report to reflect your customized dates and times</u>



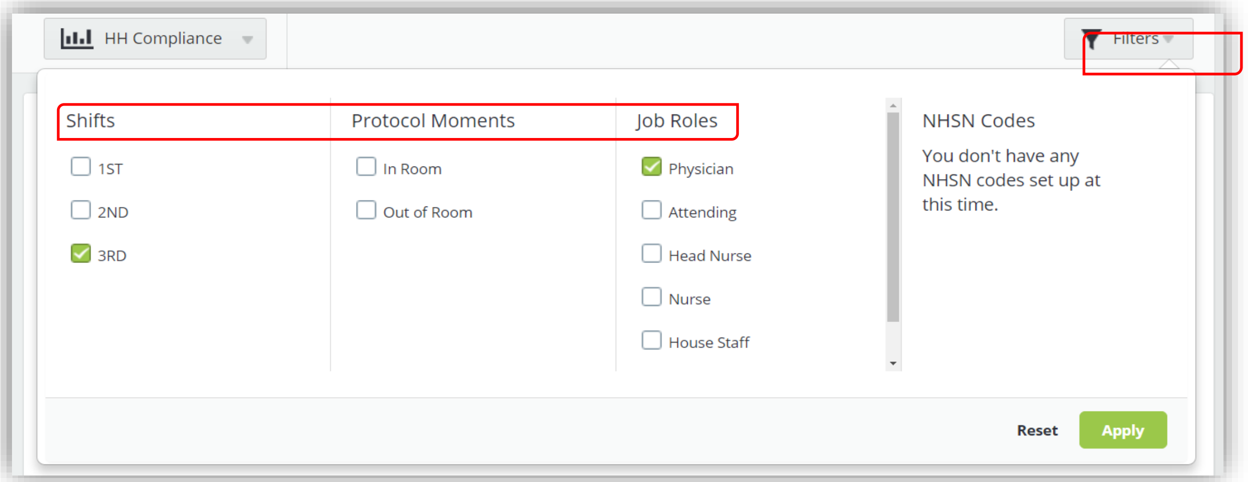
OBSERVATION REPORTS

REPORT FILTERS

Reports can be viewed differently based Shifts, Protocol Moments, and/or Job Roles. This function allows you to filter on which data you would like reflected in your report.

✓ Select the "**Filters**" button on the top right-hand side of the screen

✓ A drop down menu will appear
- Check the Shifts that you would like to appear in your report
- Click the Protocol Moments you would like to appear in your report
- Click the Job Roles you would like to appear in your report
- Once they are selected, click "**Apply**" to refresh the data



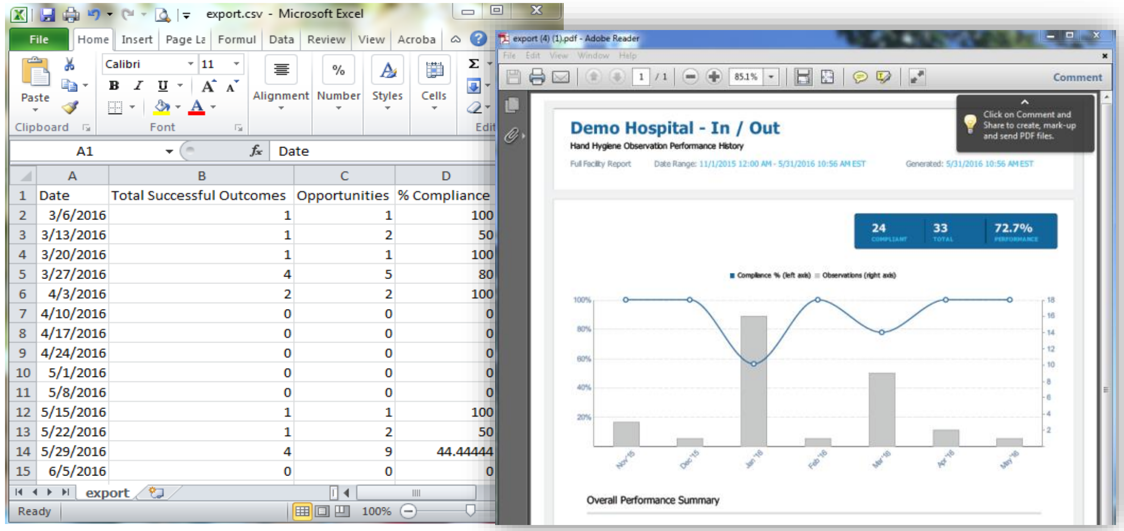
***NOTE**: If your facility does not configure data by shifts, there will be a note stating this under the Shifts filter.

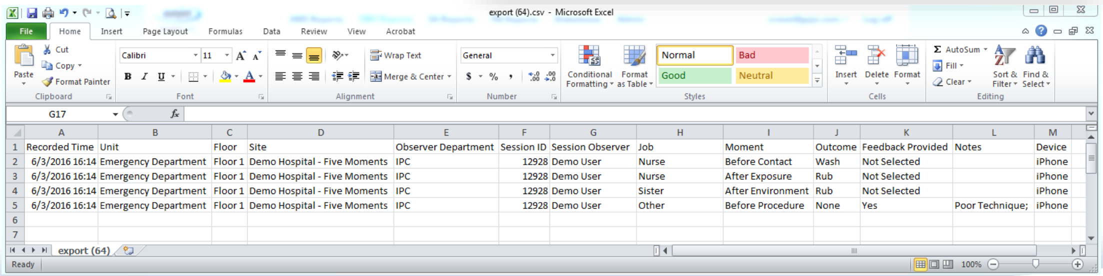
OBSERVATION REPORTS

EXPORTING DATA

Data can be pulled from the reports and exported into an Excel or PDF format.

- ✓ Under the Export drop down menu, choose one of the following:
    - Export (Excel)
    - Export (PDF)
    - Export Raw Data
- ✓ Export Report (Excel) will numerically display the data points that are on the graph in Excel
- ✓ Export Report (PDF) will create a PDF with a graph of the data
- ✓ Export Raw Data will give you all of the data points that were recorded for the scope of the report. The data points include
    - Timestamp
    - Unit/ Floor/ Site
    - Observer Department
    - Session ID
    - Session Observer Name
    - Job Role
    - Moment
    - Outcome
    - Feedback Provided/Notes
    - Device
- ✓ **NOTE**: The filters you have selected will affect the export data





OBSERVATION REPORTS

HH ACTIVITY HISTORY REPORT

The **HH Activity History** report gives you historical compliance data in a tabular form by Unit or by Job Role.

- ✓ On the OBV Report tab, click on the reports drop down and choose **“HH Activity History”** Report
- ✓ The report will default to “Activity by Unit”
  - Choose “Activity by Job Role” in the drop down to change the report data to reflect Job Role instead of Unit
  - The colored indicators let you know at a glance how the previous full quarter performed vs. the quarter before that. For example, this chart shows how Q1 2016 compared to Q4 2015.
  - The trend column changes based on these percentage differences from quarter to quarter.

HH Activity History - Full Facility Report

Export

Activity by Unit ▾ | Filter by Unit

Activity by Unit
Activity by Job Role

UNIT	QUARTERLY TREND	MAY		Q2 TO DATE		Q1 2016		Q4 2015		Q3 2015		YEAR TO DATE	
		%	#	%	#	%	#	%	#	%	#	%	#
2 East	↓	0.0%	0	0.0%	0	0.0%	0	100.0%	2	50.0%	2	0.0%	0
2 West	↑	0.0%	0	0.0%	0	100.0%	1	60.0%	5	0.0%	0	100.0%	1
Clinic	↓	0.0%	0	50.0%	2	0.0%	0	71.4%	7	0.0%	0	50.0%	2
Emergency Department	↓	0.0%	0	100.0%	4	0.0%	0	100.0%	1	0.0%	0	100.0%	4
MICU	↓	0.0%	0	0.0%	0	0.0%	0	50.0%	2	0.0%	0	0.0%	0
TOTALS		0.0%	0	83.3%	6	100.0%	1	70.6%	17	50.0%	2	85.7%	7

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↑	Green = > +3%
↓	Red = +/-3%
—	Gray Line = > -3%

OBSERVATION REPORTS

HH COMPLIANCE REPORT

The **HH Compliance** report calculates the number of observations and the compliance rate over a period of time.

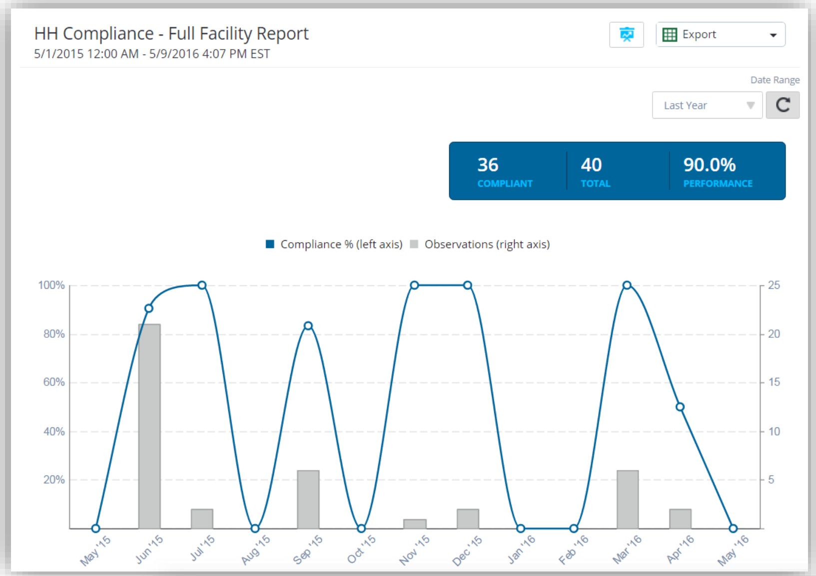
✓ On the OBV Report tab, click on the reports drop down and choose **“HH Compliance”** Report

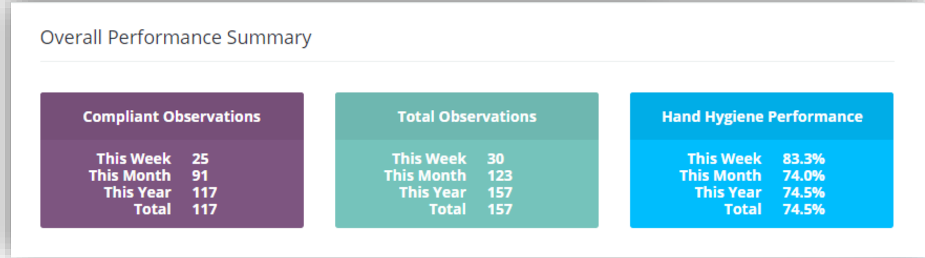
✓ Choose your filters (Units, Rooms, Shift, Time Period, etc.) The blue summary box near the top will change based on the filters selected.

✓ The data is reported in both a line and bar graph, as well as an Overall Performance Summary

✓ The Overall Summary Performance Report provides an overview of all the hand hygiene observations over time

- **Compliant Observations**: summary of observations that were recorded as either “Wash” or “Rub”
- **Total Observations**: summary of total observations including those that were recorded as compliant and non-compliant or “none”
- **Hand Hygiene Performance**: calculated by dividing the compliant observations by the total observations





OBSERVATION REPORTS

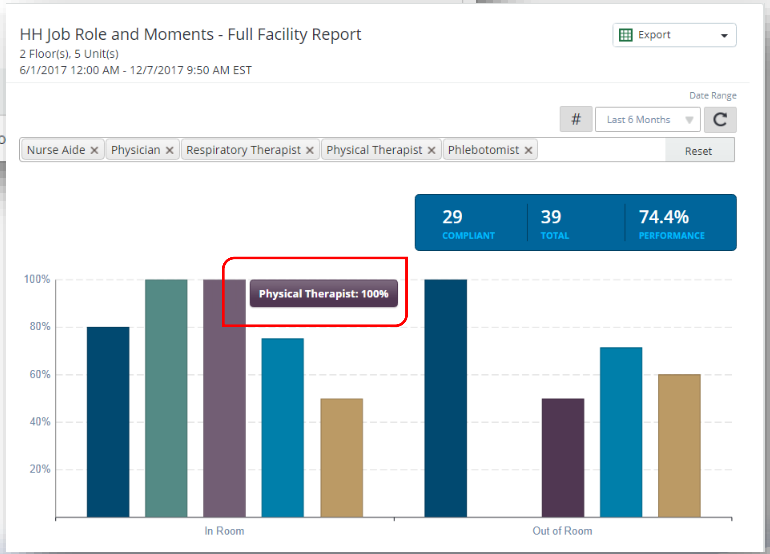
HH JOB ROLE AND MOMENTS REPORT

The **HH Job Role and Moments** report compares the compliance rates for different Job Roles by Moment and displays the data in both a bar chart and a table.

- ✓ On the OBV Report tab, click on the reports drop down and choose **“HH Job Role and Moments”** Report
- ✓ Click on the drop down to add the Job Role(s) you would like to view in the report
- ✓ Reminder: you can add and remove floors or units from the report via the green check marks at the left of the screen
- ✓ Once the report has generated, hover your mouse over any bar in the bar graph to view the Job Role and compliance percentage that bar represents
- ✓ The Chart generated provides Total (T), Compliant (C) and Non-Compliant (NC) for each Moment, by Job Role

	IN ROOM			OUT OF ROOM			TOTAL		
JOB ROLE	T	C	NC	T	C	NC	T	C	NC
Nurse Aide	5	4	1	3	3	0	8	7	1
Phlebotomist	2	2	0	0	0	0	2	2	0
Physical Therapist	3	3	0	2	1	1	5	4	1
Physician	8	6	2	7	5	2	15	11	4
Respiratory Therapist	4	2	2						
TOTAL	22	17	5						

T: Total Observations | **C:** Compliant Observations | **NC:** Non-Co

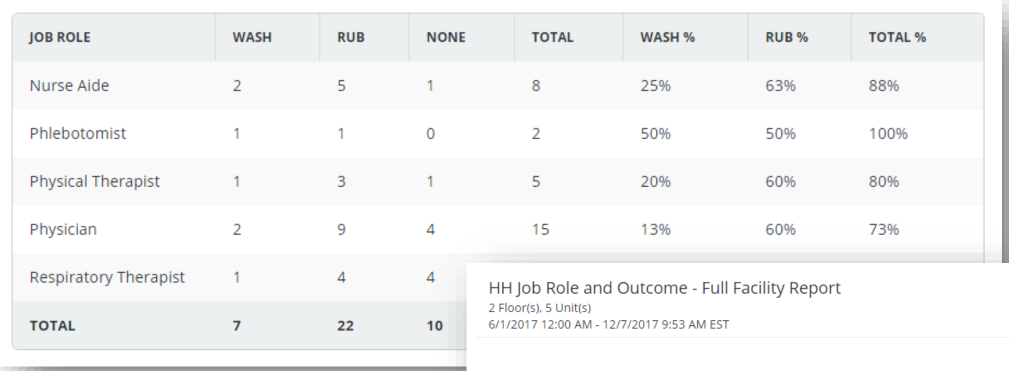


OBSERVATION REPORTS

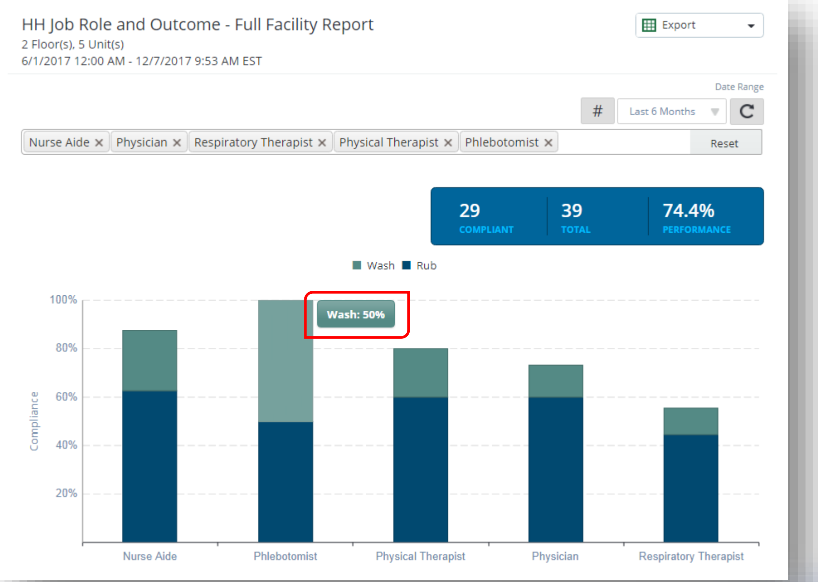
HH JOB ROLE AND OUTCOME REPORT

The **HH Job Role and Outcome** report compares the compliance rates for different Job Roles by Outcome and displays the data in both a bar chart and a table.

- ✓ On the OBV Report tab, click on the reports drop down and choose **"HH Job Role and Outcome"** Report
- ✓ Click on the drop down to add the Job Role(s) you would like to view in the report
- ✓ Reminder: you can add and remove floors or units from the report via the green check marks at the left of the screen
- ✓ Once the report has generated, hover your mouse over any bar in the bar graph to view the compliance percentage for the outcome
- ✓ The Chart generated provides Totals and Compliance rates for Wash, Rub, and None



JOB ROLE	WASH	RUB	NONE	TOTAL	WASH %	RUB %	TOTAL %
Nurse Aide	2	5	1	8	25%	63%	88%
Phlebotomist	1	1	0	2	50%	50%	100%
Physical Therapist	1	3	1	5	20%	60%	80%
Physician	2	9	4	15	13%	60%	73%
Respiratory Therapist	1	4	4				
TOTAL	7	22	10				

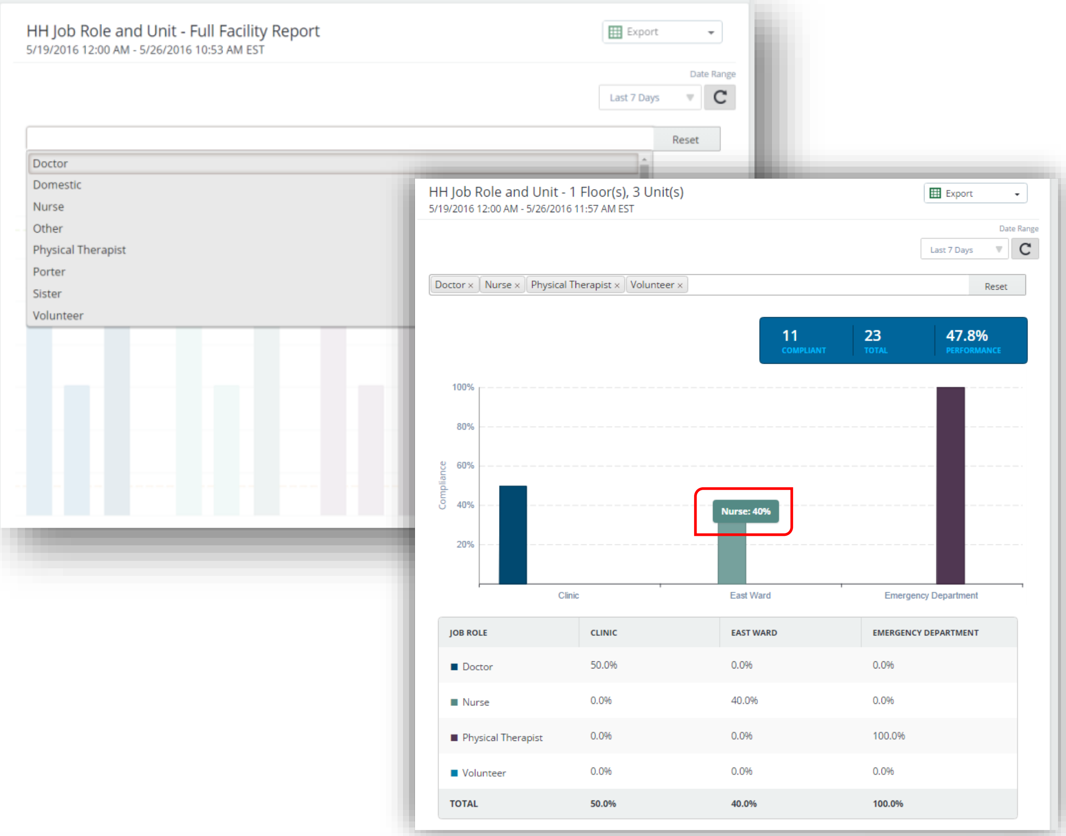


OBSERVATION REPORTS

HH JOB ROLE AND UNIT REPORT

The **HH Job Role and Unit** report compares the compliance rates for different Job Roles by Unit and displays the data in both a bar chart and a table.

- ✓ On the OBV Report tab, click on the reports drop down and choose **“HH Job Role and Unit”** Report
- ✓ Click on the drop down to add the Job Role(s) you would like to view in the report
- ✓ Reminder: you can add and remove floors or units from the report via the green check marks at the left of the screen
- ✓ Once the report has generated, hover your mouse over any bar to view the Job Role and compliance percentage that bar represents



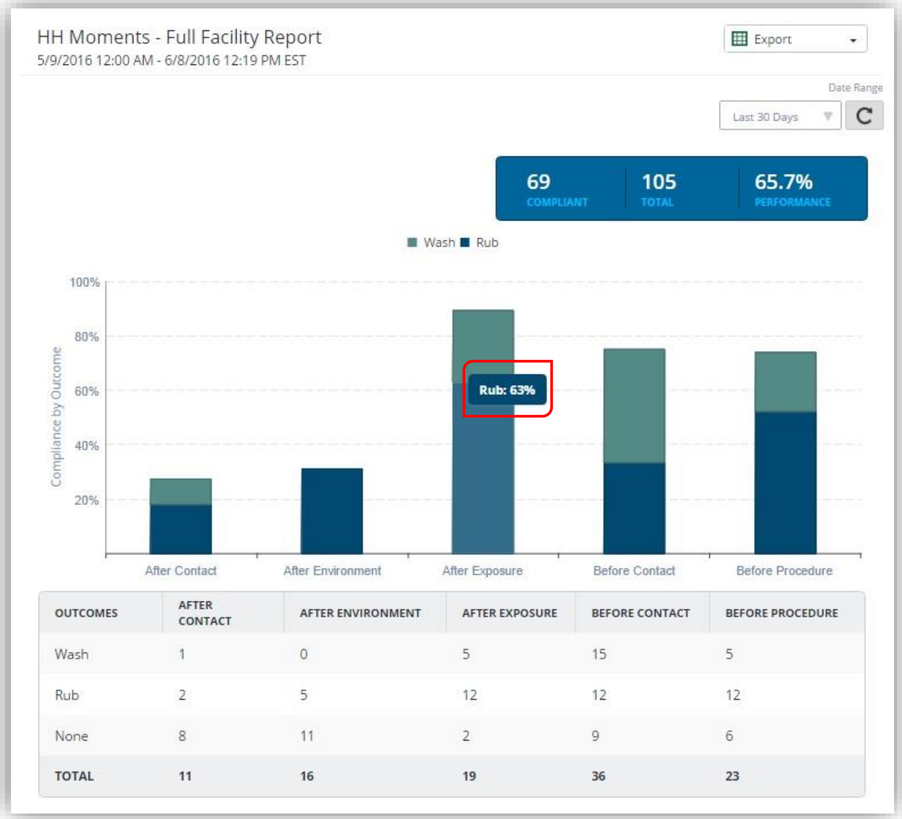
OBSERVATION REPORTS

HH MOMENTS REPORT

The **HH Moments** report displays compliance rates for hand hygiene moments by outcome (Wash, Rub, or None) and displays the data in both a bar chart and a table.

- ✓ On the OBV Report tab, click on the reports drop down and choose **“HH Moment”** Report
- ✓ Choose the desired date range you would like displayed in the report
- ✓ The “Compliance by Outcome” rates are displayed in the bar chart by each of the moments captured.
    - You can hover over the different colors on any bar to identify Wash vs. Rub and display the exact compliance rate
- ✓ The counts and totals for outcomes of Wash, Rub, and None are displayed in the table below the bar chart

*** NOTE:** If your facility is configured using the In/Out or 4 Moments protocol, those would be displayed on the graph.



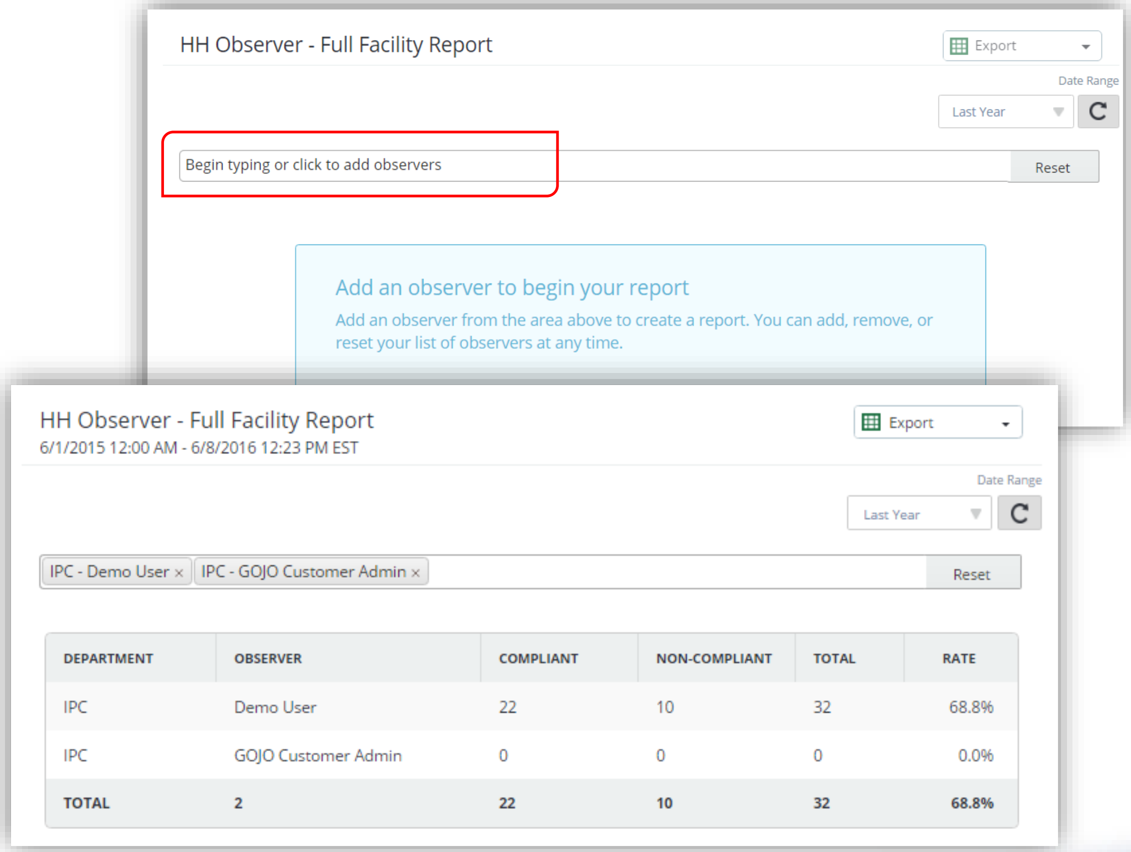
OUTCOMES	AFTER CONTACT	AFTER ENVIRONMENT	AFTER EXPOSURE	BEFORE CONTACT	BEFORE PROCEDURE
Wash	1	0	5	15	5
Rub	2	5	12	12	12
None	8	11	2	9	6
TOTAL	11	16	19	36	23

OBSERVATION REPORTS

HH OBSERVER REPORT

The **HH Observer** report displays the counts for observations completed by those in observer roles, and provides a breakdown of compliance vs. non compliant.

- ✓ On the OBV Report tab, click on the reports drop down and choose **“HH Observer”** Report
- ✓ Click on the drop down to add the “Observer(s)” to you would like to include in the report
- ✓ Reminder: you can add and remove floors, units, and rooms from the report via the green check marks at the left of the screen
- ✓ Reminder: you can adjust the period of time using the drop down menu in the right hand corner
- ✓ The table will display the observer name and department, as well as the count of observations completed, and the compliance rates

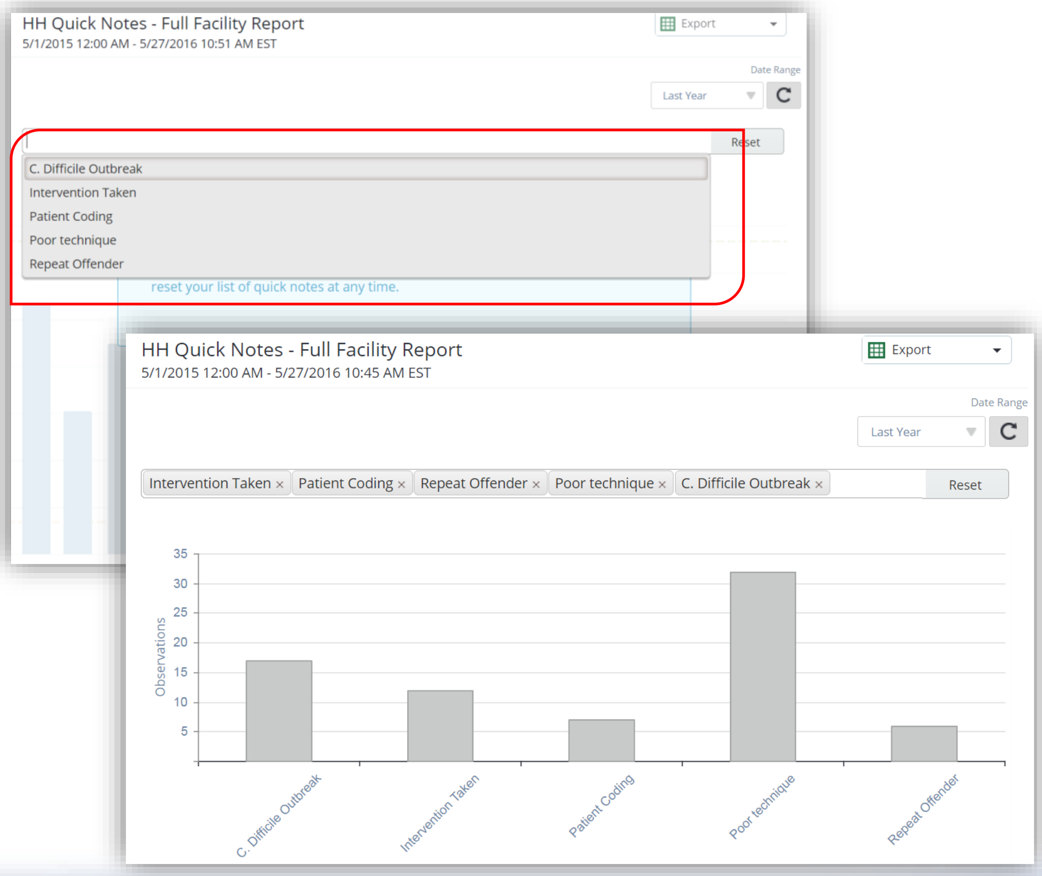


OBSERVATION REPORTS

HH QUICK NOTES REPORT

The **HH Quick Notes** report displays the count of observations that include specified Quick Notes captured over a customized period of time.

- ✓ On the OBV Report tab, click on the reports drop down and choose **“HH Quick Notes”** Report
- ✓ Click on the drop down to add the Quick Notes you would like to display
- ✓ Adjust the period of time using the drop down menu in the right hand corner
- ✓ The bar chart will display the count of each specific Quick Note that was included in the observations taken during that period of time.



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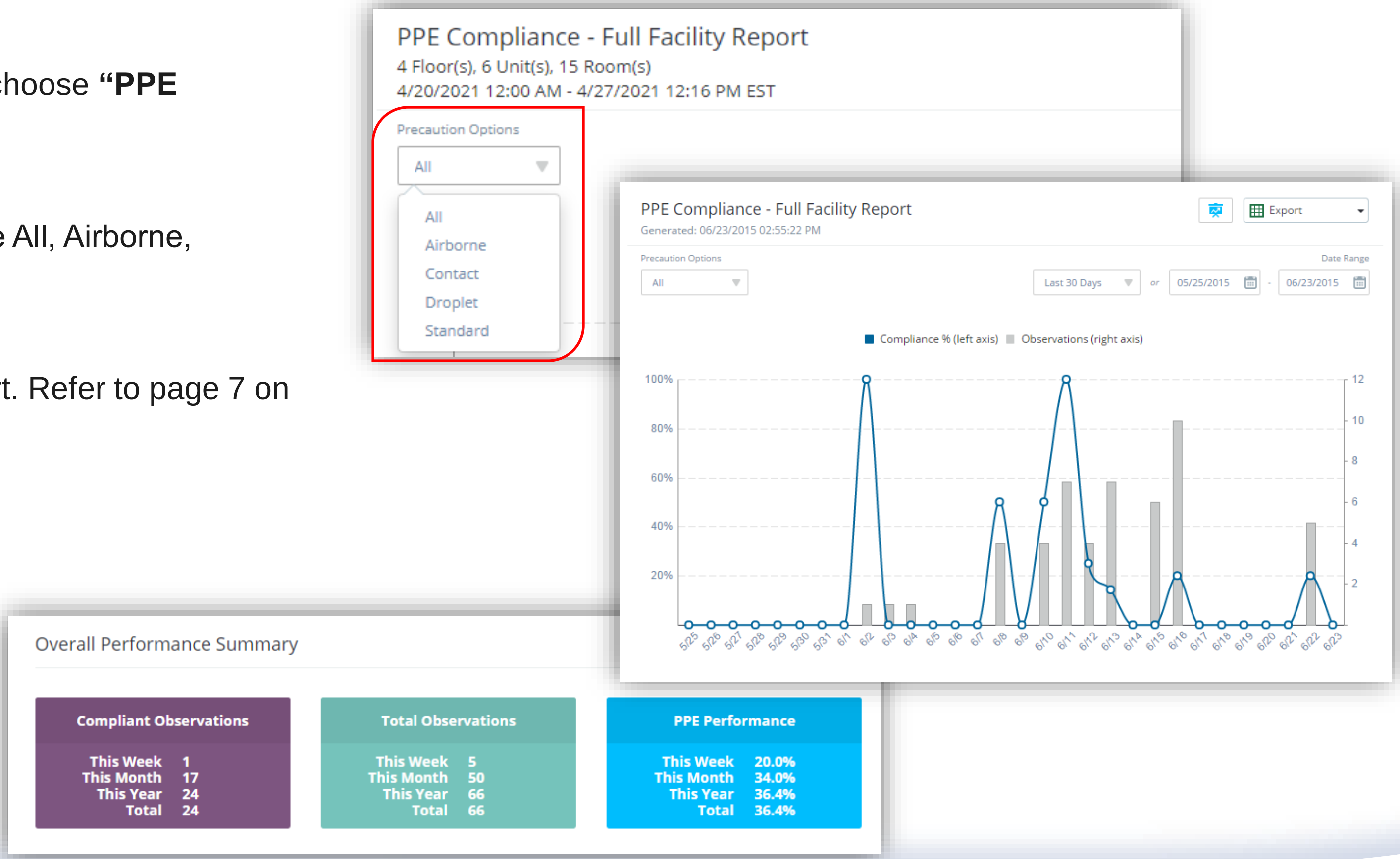
OBSERVATION REPORTS

PPE COMPLIANCE REPORT

The **PPE Compliance** report displays the number of observations and the compliance rate over a period of time.

- ✓ On the OBV Report tab, click on the reports drop down and choose **“PPE Compliance”** Report
- ✓ Use the additional filter under “Precaution Options” to choose All, Airborne, Contact, Droplet, or Standard
- ✓ An overall compliance summary is also included on the report. Refer to page 7 on how to read and use this section



SLIDESHOWS

SLIDESHOWS

The **Slideshows** tab allows you to display and show your facility's hand hygiene reports on Feedback Monitor(s).

✓ At the top of the screen, choose **"Slideshows"**

✓ You can use this tab to add and manage slideshows, as well as activate and deactivate slideshows

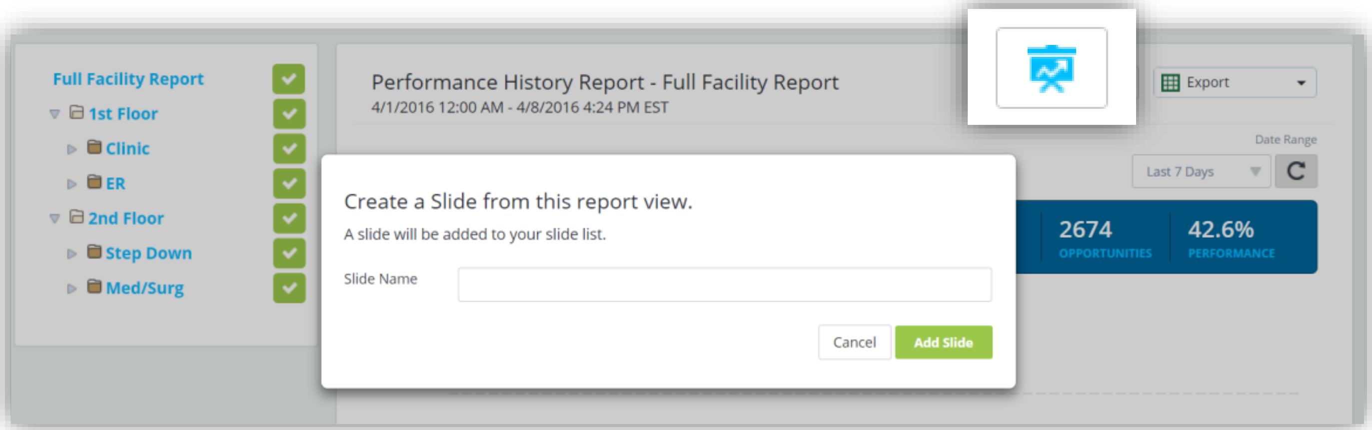
✓ TIP: GOJO recommends the following specifications for internet connection and monitors for the best display of these slideshows:

- Use a computer supported by your IT department with a modern internet browser (i.e.. IE110 or newer, Chrome, or Safari)
- Monitors
  - 24" HD Flat Screen with 1920 x1080 resolution or better with inputs 1x HDMI, 1 x VGA HD or better
  - 32" HD Flat Screen with 1336 x 768 resolution of better with inputs 1 x HDMI, 1 x VGA HD or better

SLIDESHOWS

CREATING A NEW SLIDE

- ✓ To create a slide for the slideshow, begin on the **OBV Reports Tab** and choose the report you would like in the drop down menu
- ✓ Click on the slideshow icon on the far right-hand side of the report page
  - **** NOTE**: If you have filters that are applied to the report, they will be reflected in the slideshow
- ✓ A screen will pop up asking you to create a slide form this report. Type in a slide name and select “Add Slide”
  - ****NOTE:** The slide name cannot be edited once it has been saved
- ✓ The slide will be added to your slide list on the Slideshows tab



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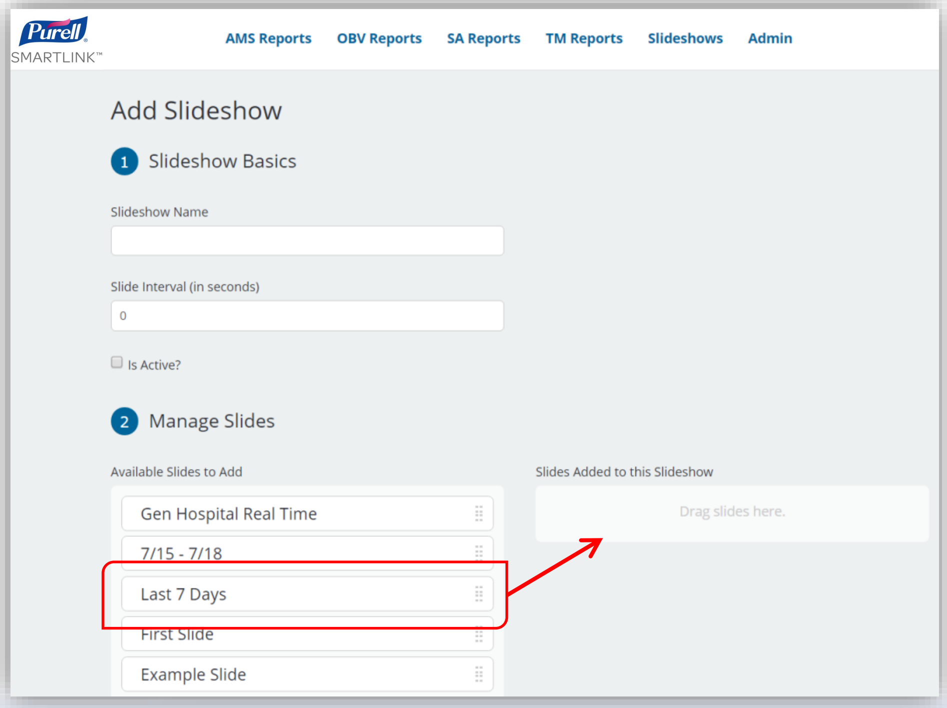
SLIDESHOWS

CREATING A SLIDESHOW

- ✓ At the top of the screen, choose the **“Slideshows”** tab
- ✓ Click on the **“Add Slideshow**” green button
- ✓ Fill out Slideshow Name and the time interval (in seconds) between each slide
- ✓ Drag the desired slide from “Available Slides to Add” to the right under “Slides Added to this Slideshow”
- ✓ Continue to drag and drop the slides to add and to reorder them
- ✓ Click the “submit” button to save your slideshow

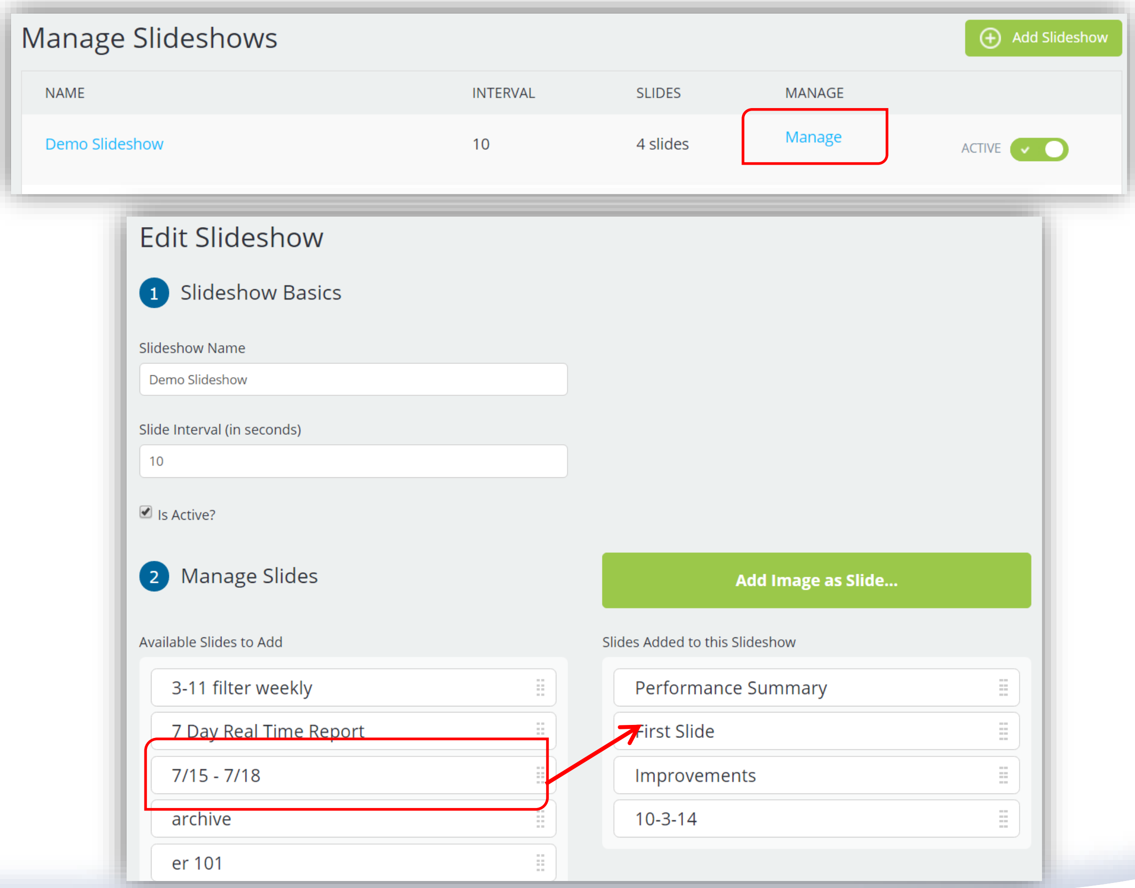


SLIDESHOWS

ADDING A SLIDE TO A SLIDESHOW

Anyone with access to the SMARTLINK Software can add **available slides** to a slideshow.

- ✓ At the top of the screen, choose the **“Slideshows”** tab
- ✓ Find the Slideshow you would like to add a new slide to, and click on **“Manage”**
- ✓ Drag the desired slide from “Available Slides to Add” to the right under “Slides Added to this Slideshow”
- ✓ Continue to drag and drop the slides to reorder them
- ✓ Click the “SAVE” button to save your slideshow
- ✓ **NOTE:** Once a slide is created and added to a slideshow, it will automatically update to the most current data

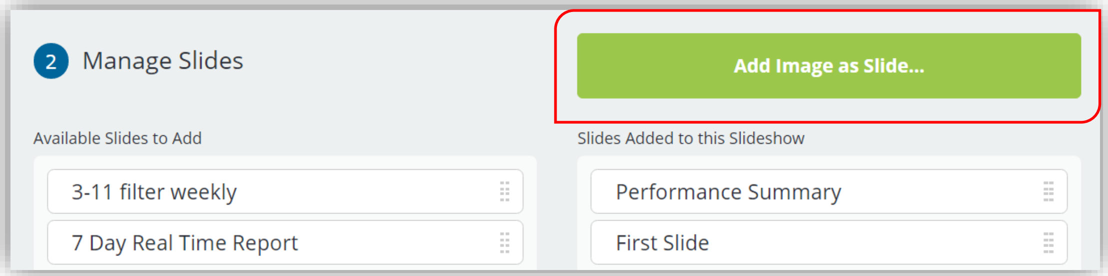


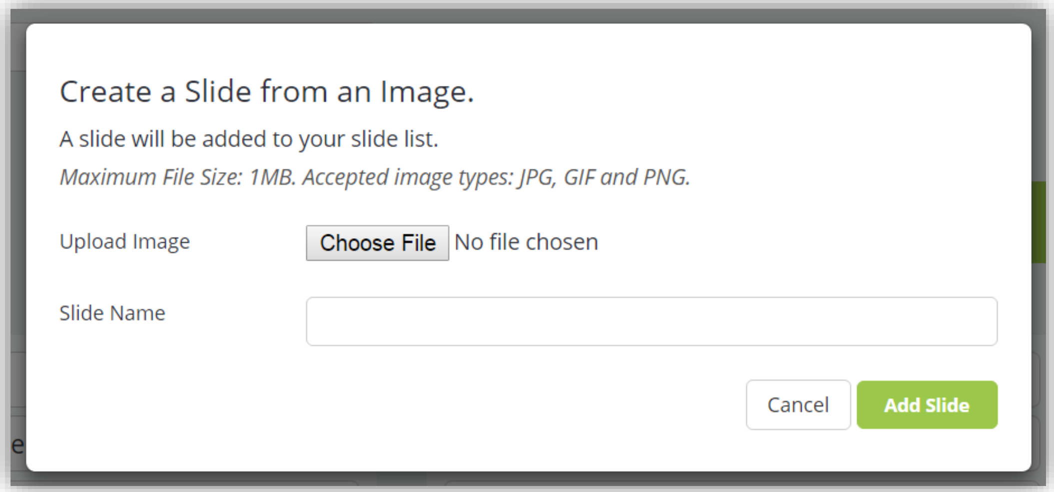
SLIDESHOWS

ADDING AN IMAGE AS A SLIDE

Only administrators can upload images to appear as slides on the feedback monitors.

- ✓ Select the “Add Image as Slide” green button on the **“Slideshows”** tab
- ✓ Choose the file from your computer that you would like to upload into the slideshow
- ✓ Click “Add Slide”
- ✓ **NOTE**: The maximum file size is 1MB and the accepted image file types are JPG, GIG, and PNG
- ✓ TIP: Use the program called Microsoft Windows Paint to resize your image or to save it as one of the accepted file types
- ✓ TIP: If you export a PowerPoint slide as a JPEG you are able to upload it as an image to use in the slideshows

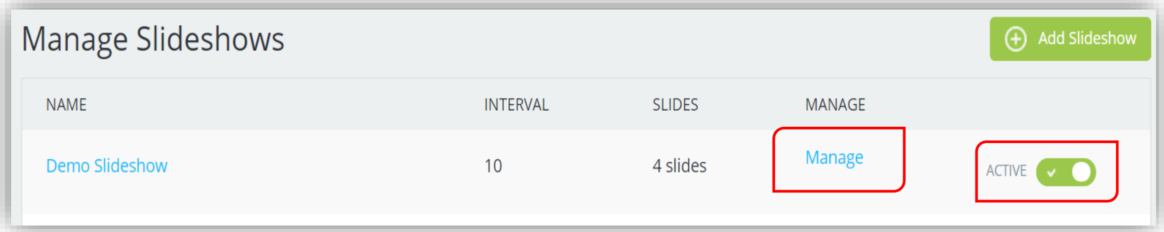


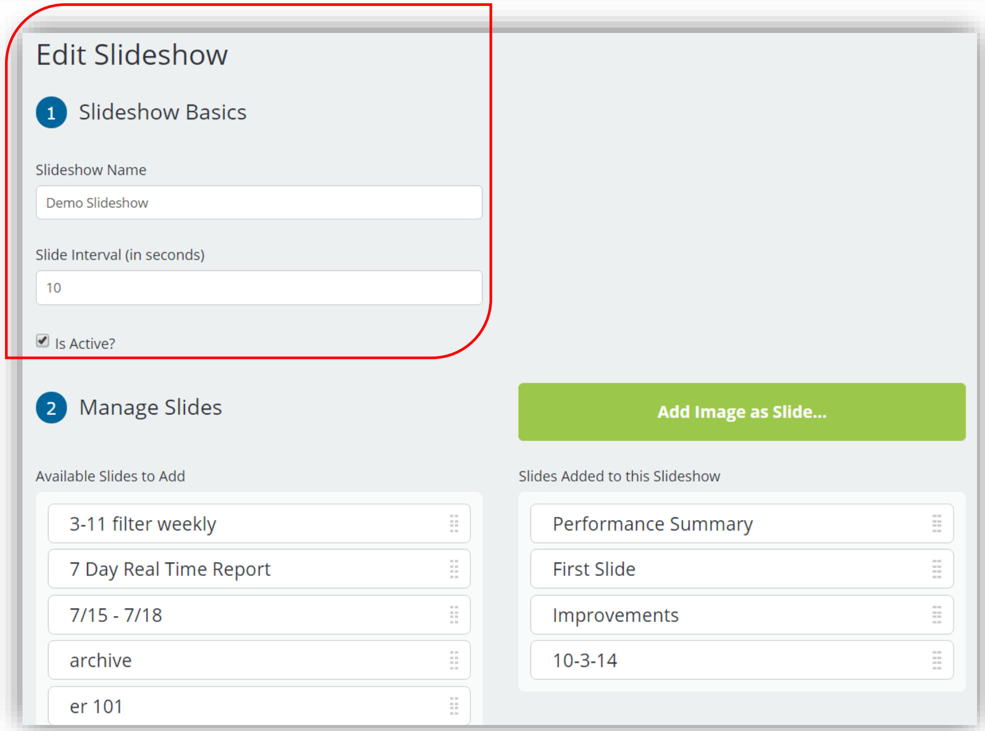


SLIDESHOWS

MANAGING SLIDESHOWS

- ✓ To preview a slideshow, click on the hyperlink with the slideshow name listed
- ✓ Click the **Green checkmark** if you want to make a slideshow inactive
- ✓ Click the **Red X** if you want to change a slideshow to active
- ✓ To make changes to a slideshow click “Manage” under the slideshow name
    - You can update the name of the slideshow (this name will display as the name of the slideshow)
    - Adjust the time interval (in seconds) between each slide
    - Check the box to activate the slideshow and enable it to be displayed on the Feedback Monitor(s)





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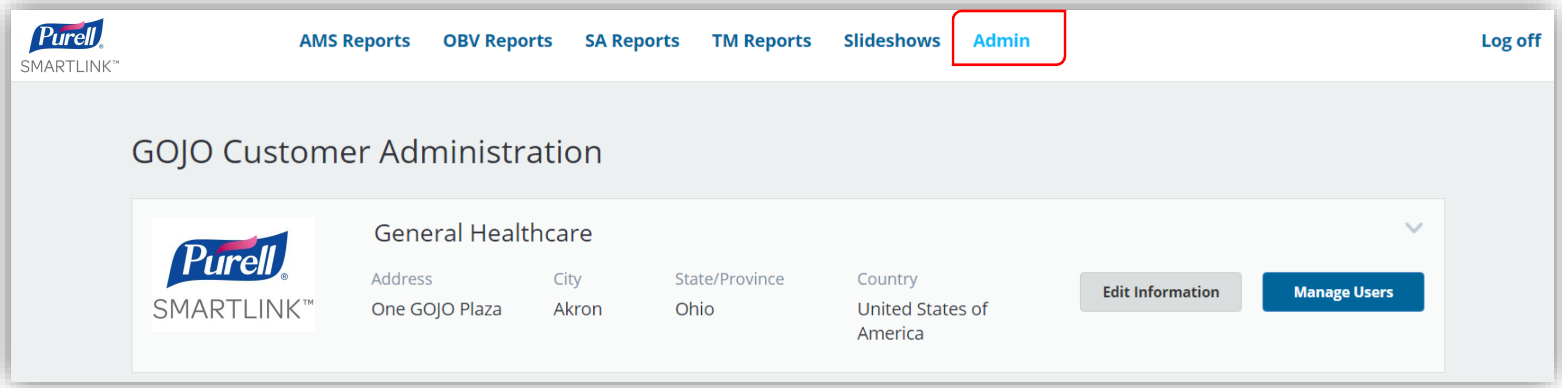
ADMIN

ADMIN

The **Admin** tab is where Administrators can edit an account.

✓ You will you use tab to:

- Set up a new user and maintain current users
- Edit the baseline and performance goals for each unit and the facility
- Manage observable job roles
- Manage facility and report settings



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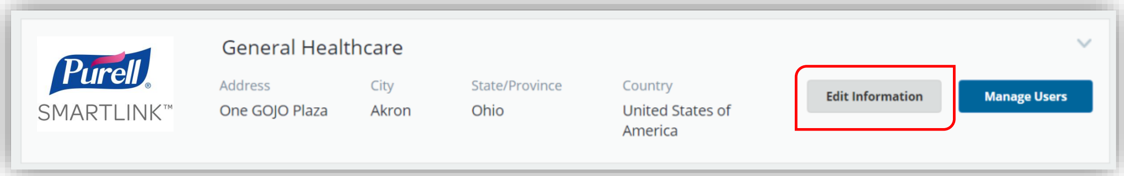
EDITING INFORMATION

You can update general information about your facility including name, location, and region.

✓ In the Admin tab, select the “Edit Information” button. You can edit the following information

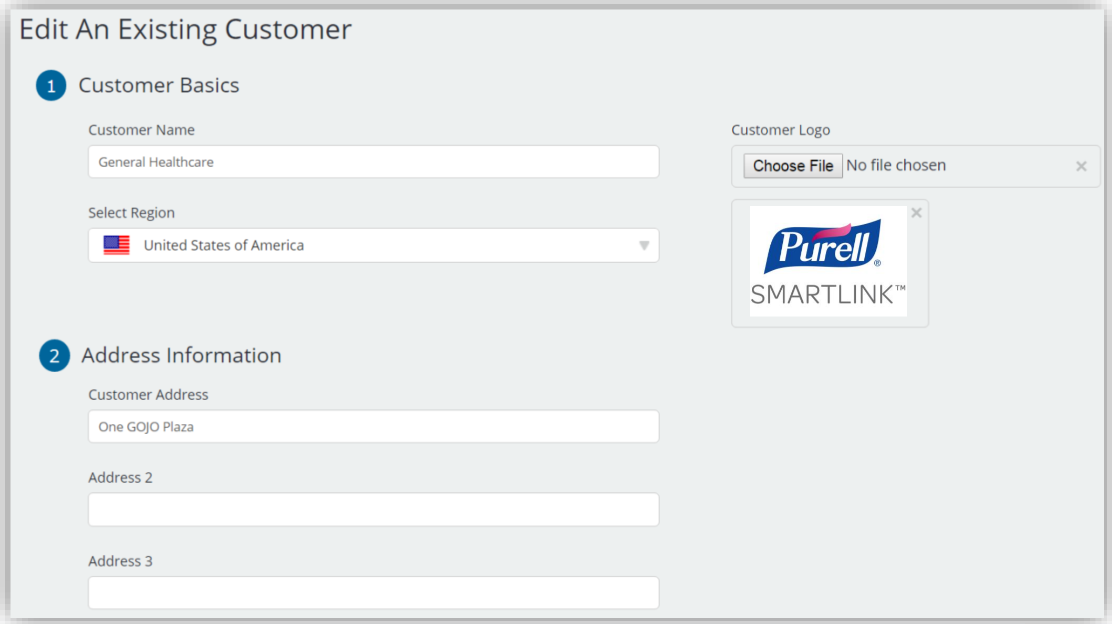
- Customer Name
- Address Information



✓ **NOTE:** GOJO will fill in this information when we create your account. You are able to edit the information as needed

✓ Click the browse button to upload the logo of your facility/hospital

✓ Always click SAVE when making any changes

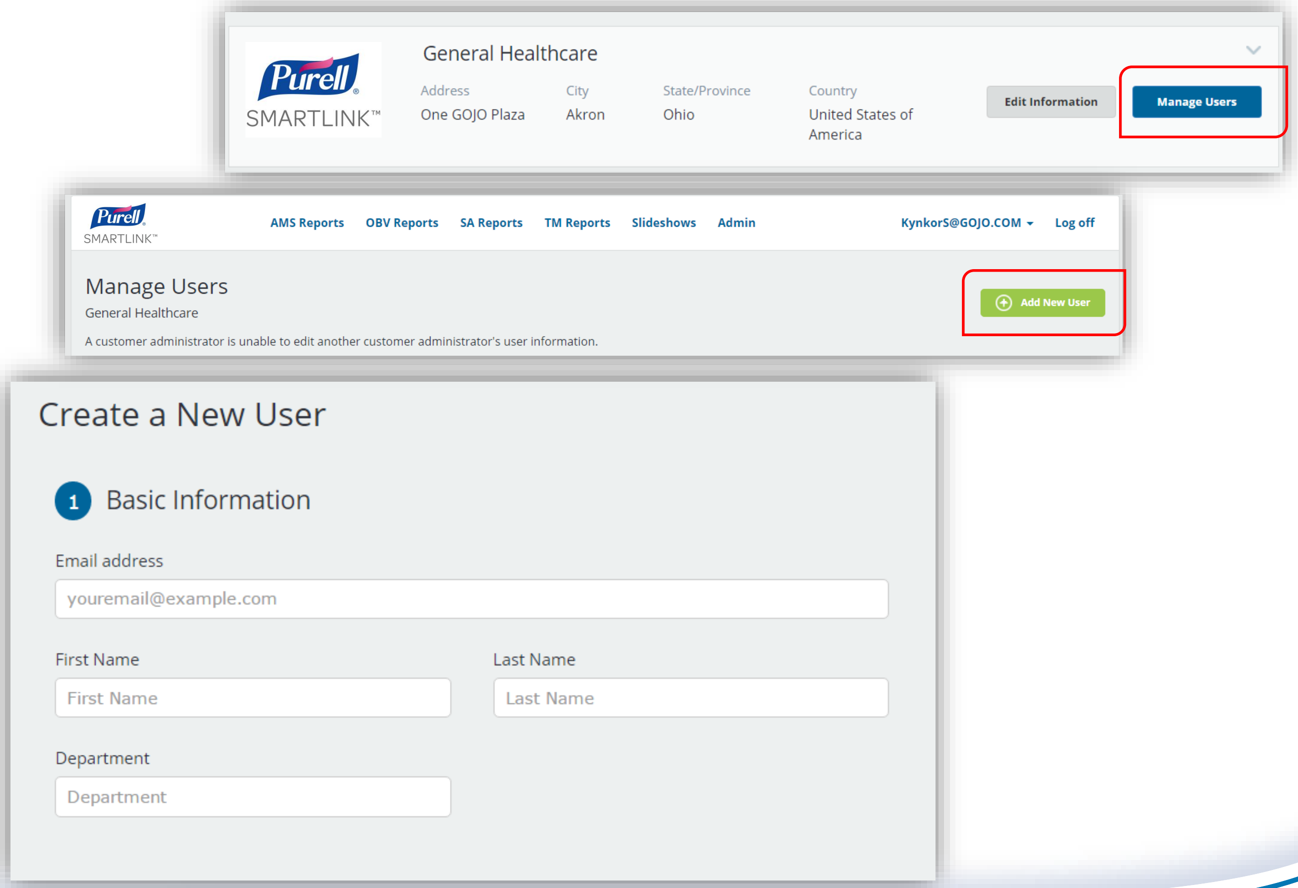


ADMIN

MANAGE USERS

The **Manage Users** section allows you to add a user or edit user roles and basic information.

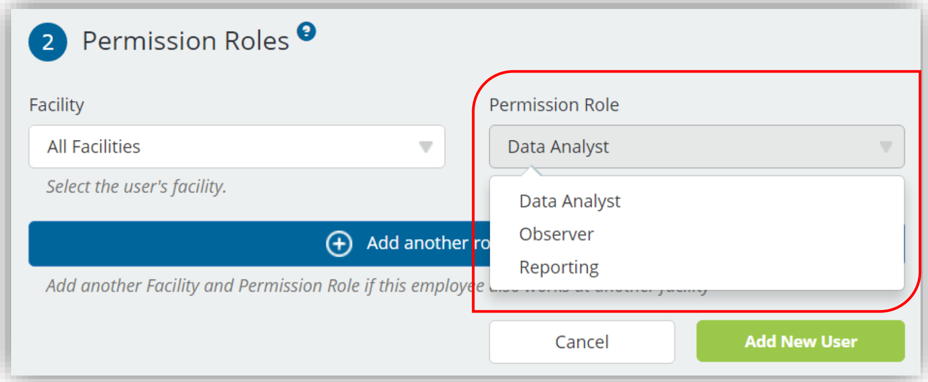
- ✓ Select "Manage Users" on the Admin tab
- ✓ To add a user, select the green "**Add New User**" button on the right-hand side of the screen
- ✓ Type the new user's basic information including his/her Email Address, First Name, and Last Name, and Department
- ✓ **NOTE:** If you need to Add or Edit Customer Admin's, please request this by sending an email to SMARTLINK Support at SMARTLINKSupport@gojo.com

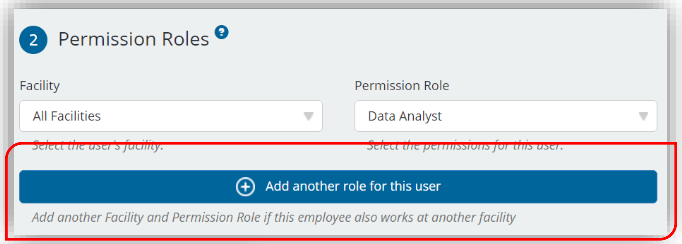


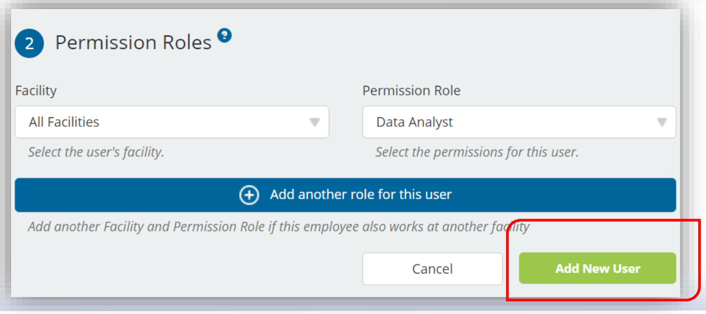
ADMIN

MANAGE USERS CONT.

- ✓ When filling out the new user's Permission Roles, you will select the facility he/she will be working in and his/her role
- ✓ Choose a facility from the drop down menu or select "All Facilities"
- ✓ Select the Permission role:
  - Data Analyst - Access to all reports and all export types
  - Observer - Access to submit observations via the OBV system mobile application; cannot access OBV System from a desktop computer; cannot access reports or exports
  - **NOTE:** The Observer role is only used with the Observation System / Mobile Application, not the SMARTLINK Activity Monitoring System (AMS) or Service Alerts (SA) Systems
  - Reporting - access to all reports based on the facility's license and PDF/Excel export; cannot export raw data
- ✓ If the employee also works at another facility or needs a second role, select "Add another role for this user"
- ✓ Click "Add New User" when you are finished filling out the new user's role(s) and information



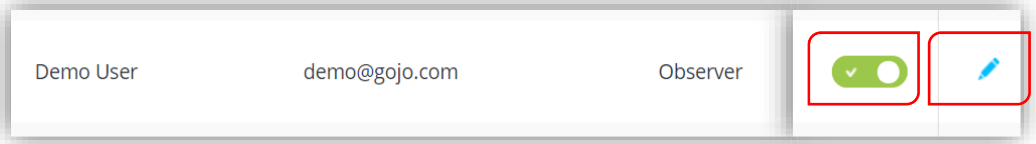




ADMIN

MANAGE USERS CONT.

Manage Users also allows you to edit your users’ information.



✓ Admins can see the user roles listed next to their name

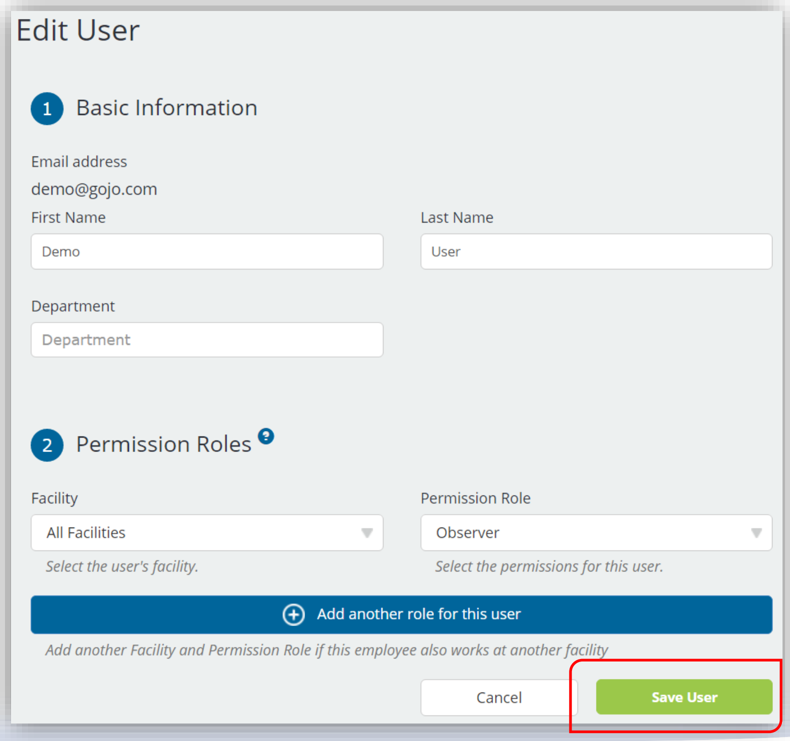
✓ Admins can see other Admin user information, but cannot edit this information

✓ You cannot delete a user, but you can de-activate a user by clicking the **Green Checkmark** next to the user’s name

✓ To edit a user’s information, select the blue pencil icon to the right of their name

- You may edit basic information including assigning a department
- You may also remove the role of the user, add another facility where he/she will be working and edit his/her permission role

✓ Select “Save User” once you are finished editing any information

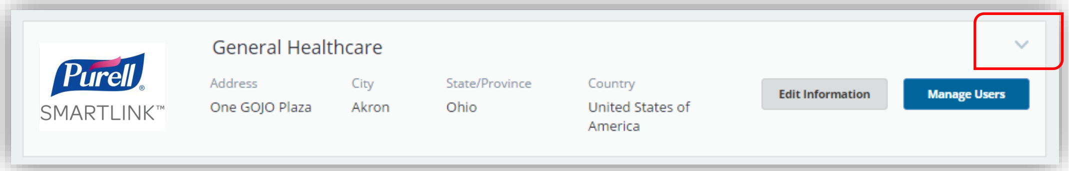


ADMIN

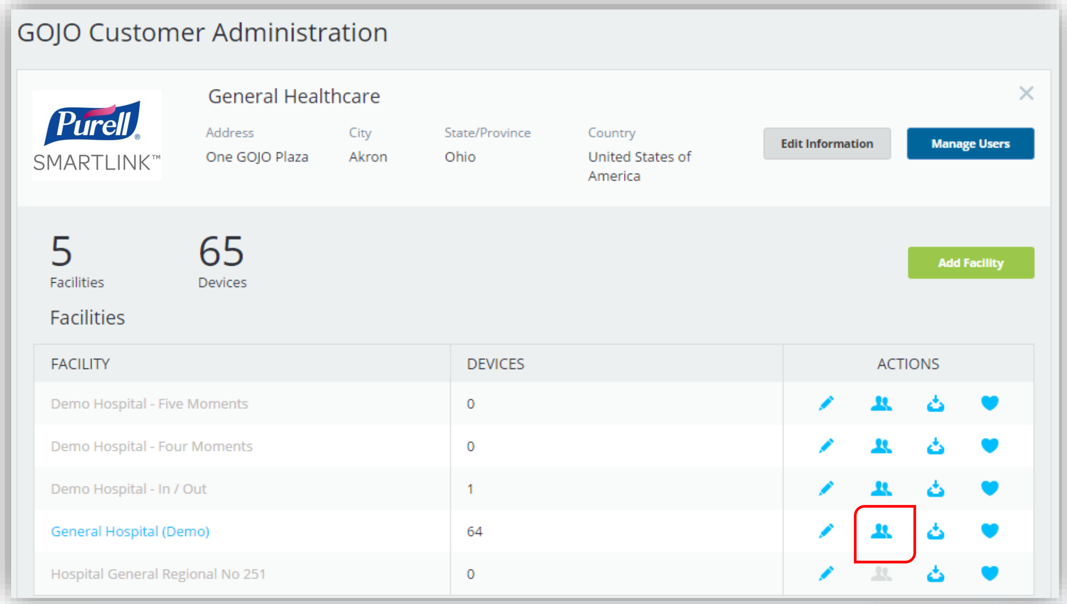
MANAGE JOB ROLES

The **Manage Job Roles** section allows you to change the Job Roles in your facility that will be used during the Observation with the PURELL SMARTLINK™ System app.

✓ In the Admin tab, select the arrow in the right-hand corner of the screen to reveal a drop down menu



✓ The screen will open up a new section with ACTIONS you can take



✓ These "Actions" include

- Edit
- **Manage Job Roles**
- Archive Facility
- System Health

✓ Select the **Job Roles** Icon to add or change job roles in your facility

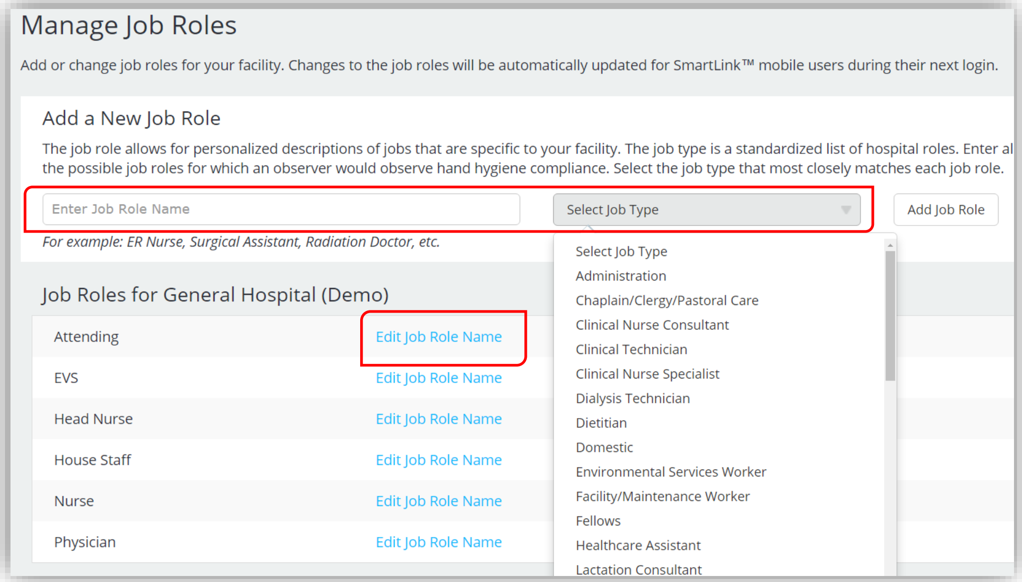
✓ **NOTE**: Changes to the job roles will automatically update on the PURELL SMARTLINK ™ Observation App for all users during their next login

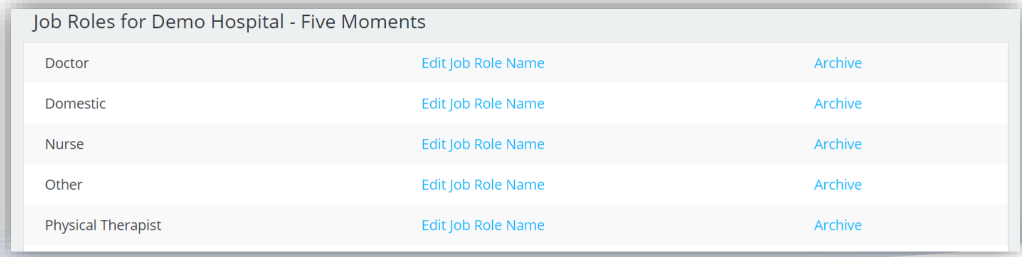
ADMIN

MANAGE JOB ROLES CONT.

The Job Role allows for the personalized descriptions of jobs that are specific to your facility.

- ✓ Type in the name of your job role on the left side in the “Enter Job Role Name” box. There is a 30 character limit
- ✓ The Job Type is a standardized list of hospital roles. Select the job type that most closely matches each Job Role you have entered
  - **NOTE**: For Physician, choose from resident, staff, or fellows
- ✓ Once you are finished, click the “Add Job Role” button
- ✓ To EDIT the name of a Job Role:
  - Click on “Edit Job Role Name” in the middle column under Job Roles
  - **NOTE:** Once the job role has been added/submitted, you cannot delete it
  - To deactivate a job role you can select “Archive” on the right side of the column and it will drop the Job Role down on the bottom of the page
  - To restore a Job Role to an active state, click on “Restore”.

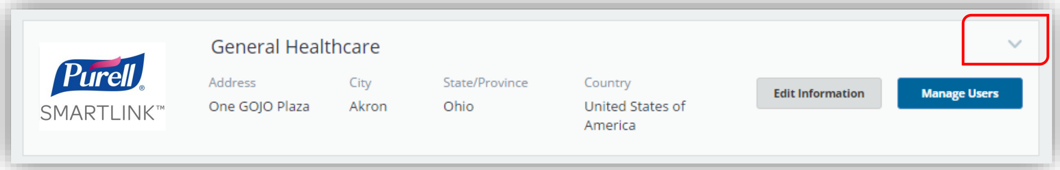




ADMIN

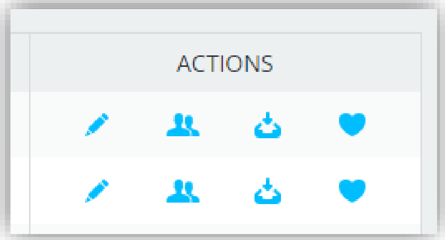
ACCESSING FACILITIES

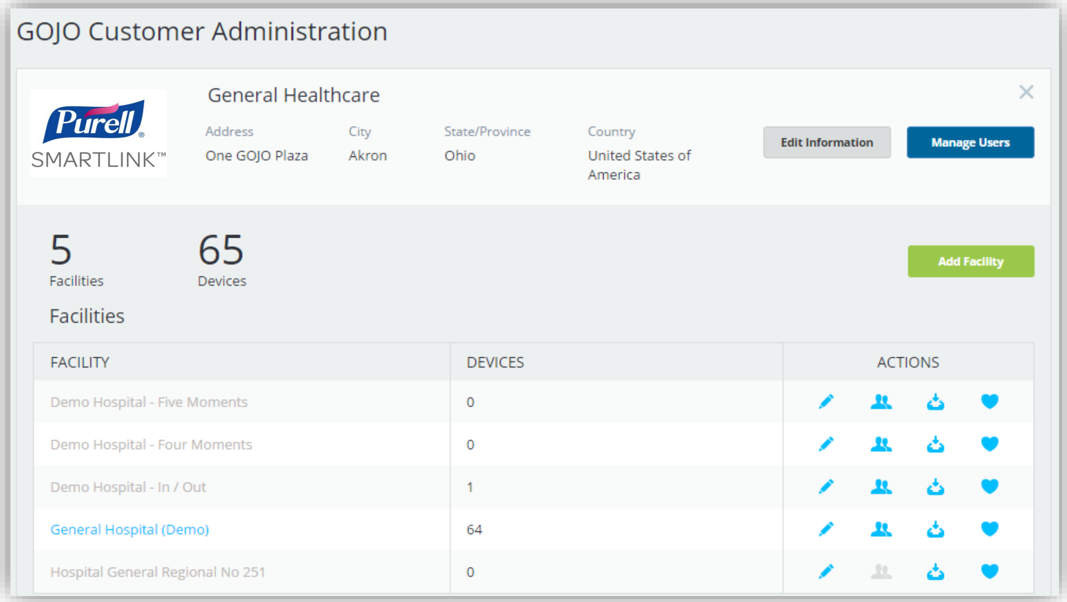
You can access or edit information on the facilities, job roles, archives, and system health.



- ✓ In the Admin tab, select the arrow to reveal a drop down menu in the right-hand corner of the screen

- ✓ The screen will open up a new section with ACTIONS you can take:





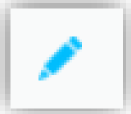
- ✓ These Actions include
  - Edit
  - Manage Job Roles
  - Archive Facility
  - System Health (*only for AMS customers*)

ADMIN

EDITING A FACILITY

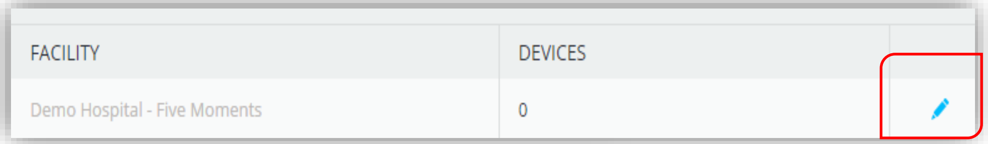
Editing a facility is very similar to adding a facility.

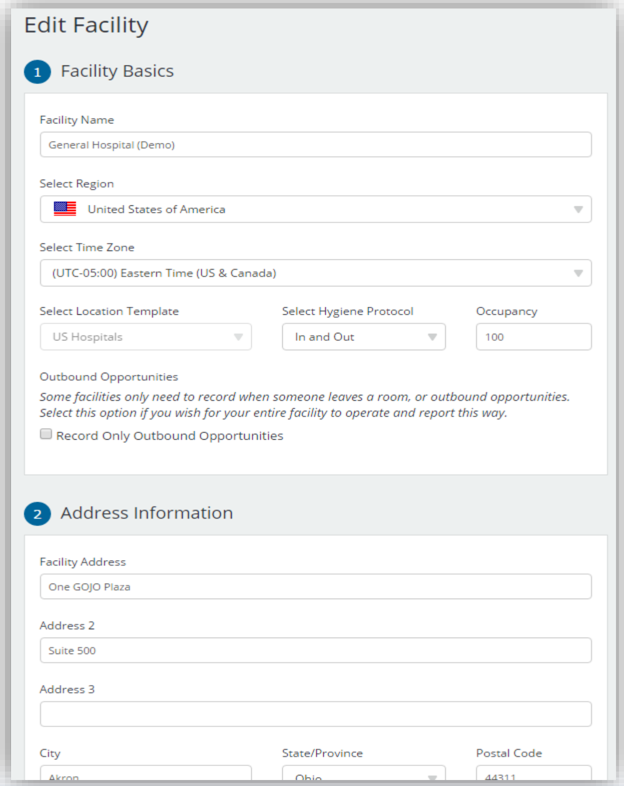
✓ Select the blue pencil icon to edit your facility's information



✓ The information that you currently have for your facility can be edited by simply clicking on the section that you would like to change and typing in the correct information
- Facility Basics
- Address
- Report Settings
- Quick Notes (Add/Edit)

✓ Click "Save" button at the bottom of the page once your information is updated





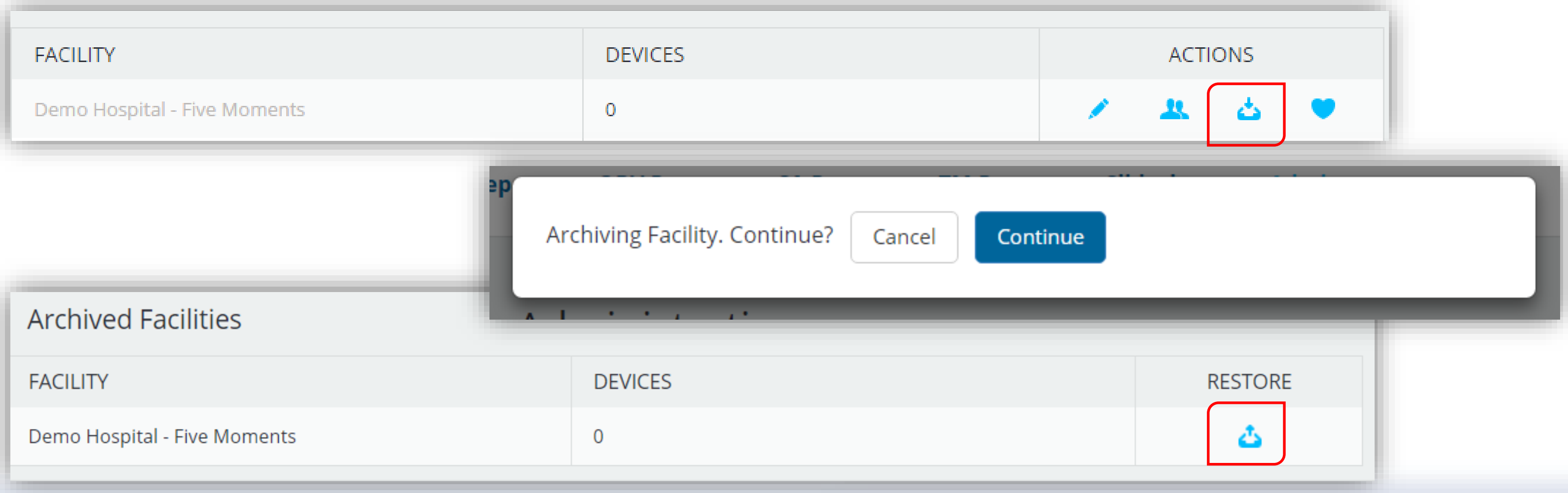
ARCHIVING A FACILITY

You can place a facility into the archive so the data from that facility will no longer reflect in the reports.

✓ Click on the **Archive Facility** icon 

✓ A menu will pop up asking you if you would like to continue archiving. Click **Continue.**

✓ To remove a facility from the Archives and restore it to an active state, click the restore icon under Archived Facilities



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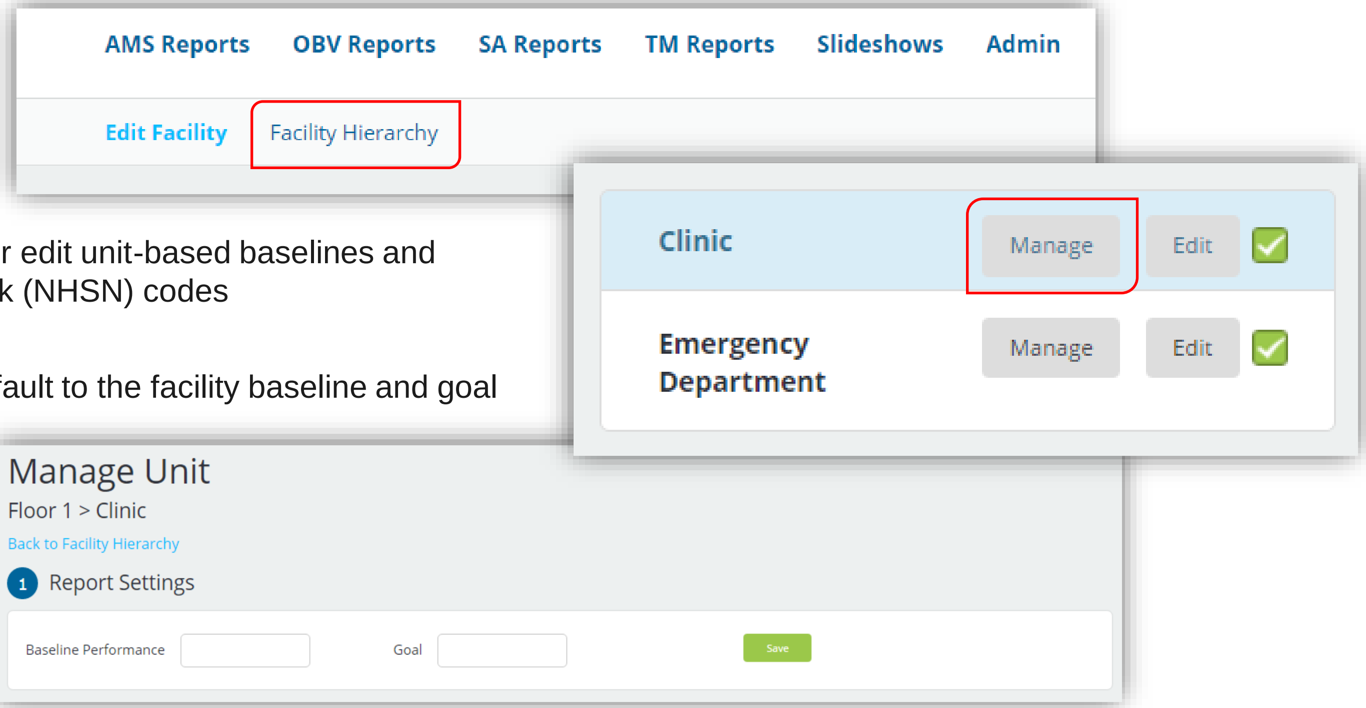
ADMIN

FACILITY HIERARCHY

This page allows you to set-up and manage your facility's hierarchy. The hierarchy will define the reporting structure and locations where you will execute observations.

- ✓ From the Admin tab, click the drop down arrow on the right-hand side of the screen
- ✓ Click the blue pencil icon to edit your chosen facility
- ✓ At the top of the page, click on **Facility Hierarchy**
- ✓ Choose the manage button in the middle column to assign or edit unit-based baselines and goals or to assign or edit National Healthcare Safety Network (NHSN) codes
- ✓ If no unit-based baselines or goals are not present, it will default to the facility baseline and goal if provided
- ✓ Be sure to click Save after making changes

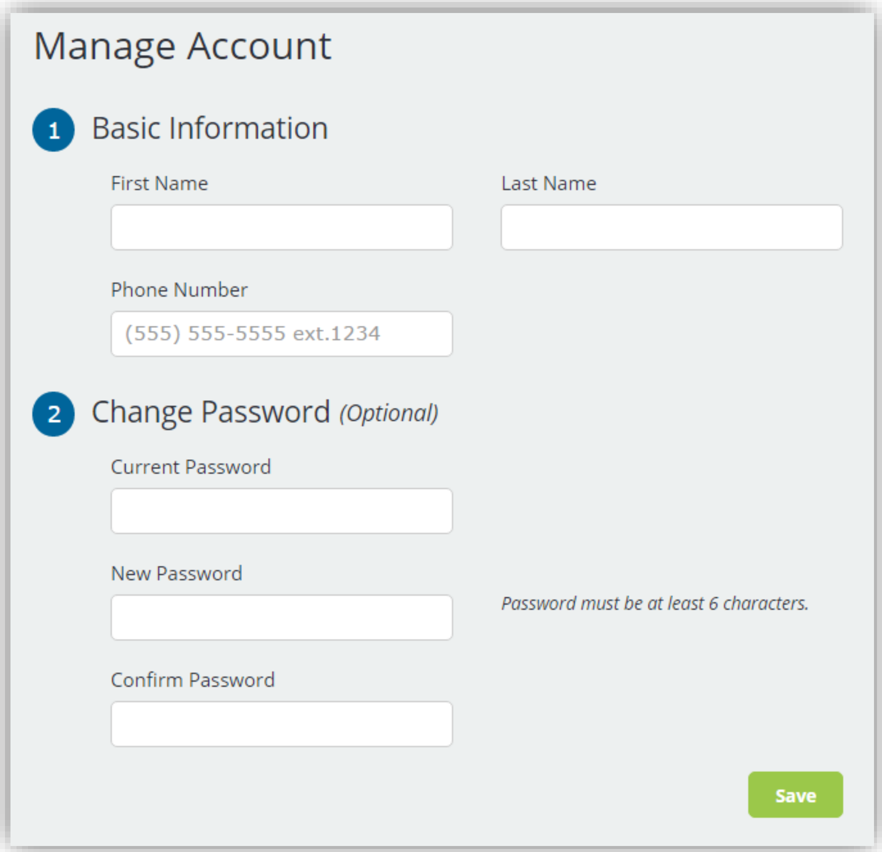


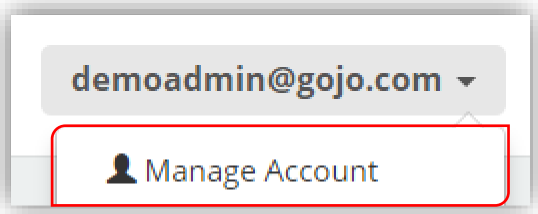
ACCOUNT MANAGEMENT

MANAGING YOUR ACCOUNT

Users can update their account information including changing their password within the software.

- ✓ At the top of the screen, click on the arrow next to your user name (must be logged in)
- ✓ Choose Manage Account
- ✓ You can change basic information and change your password
- ✓ Be sure to click Save when making any changes



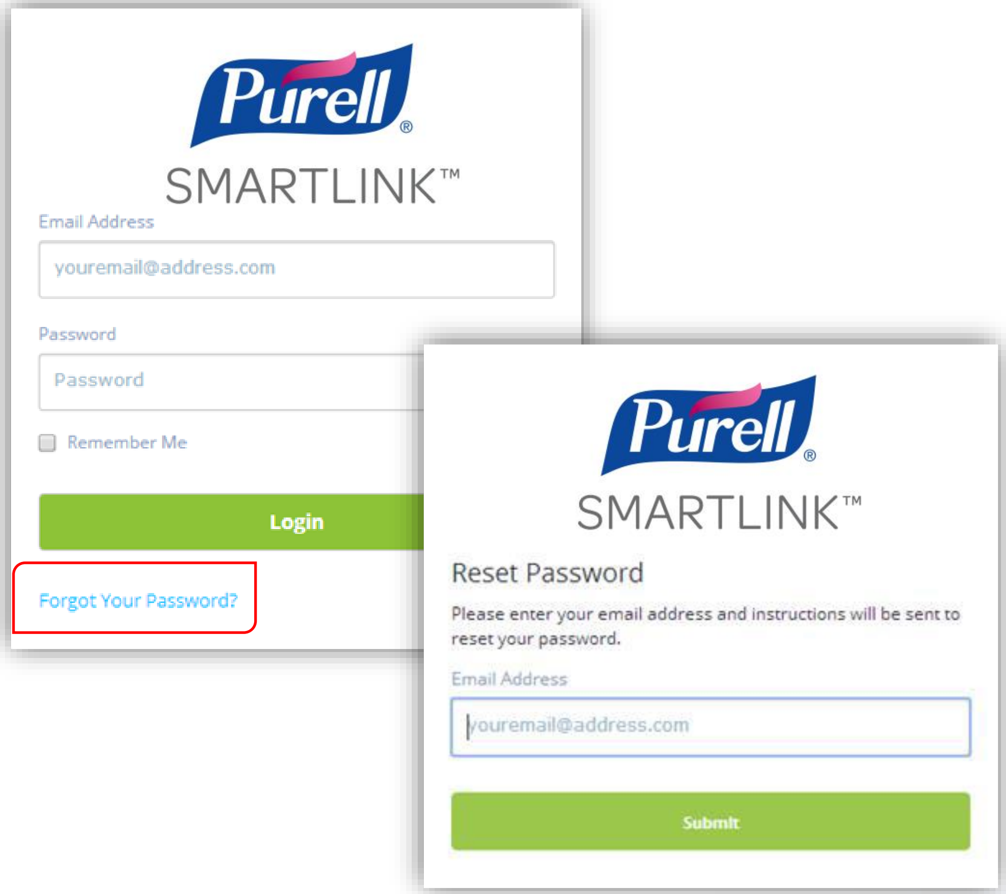


ACCOUNT MANAGEMENT

RESETTING YOUR PASSWORD

Users can reset their own password.

- ✓ To reset your password, go to the login page and click the "**Forgot Your Password**" link at the bottom
- ✓ It will take you to the "Reset Password" page where you can enter your email address and click submit
- ✓ Instructions on how to reset your password will be sent to your email address



SMARTLINK HELP

TECHNICAL SUPPORT

Questions and requests for PURELL SMARTLINK^{TM} System Support can be emailed to SMARTLINKSupport@gojo.com

The PURELL SMARLTINK^{TM} Observation App training can be accessed via the Help button within the mobile app or at: https://youtu.be/A5cW0mFMviA

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