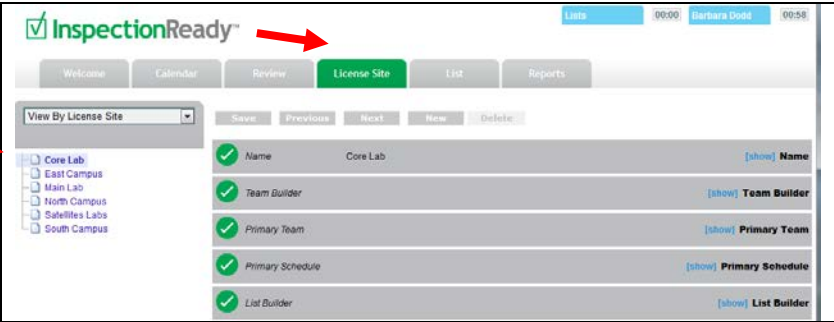
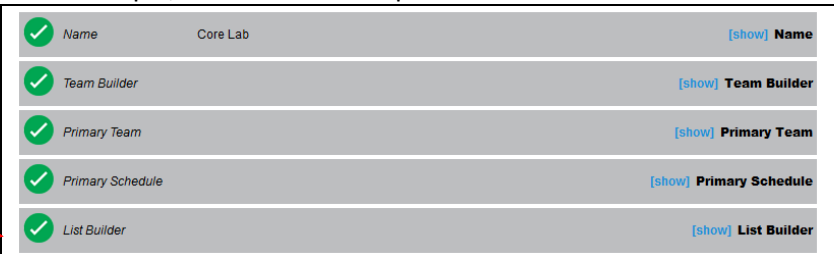
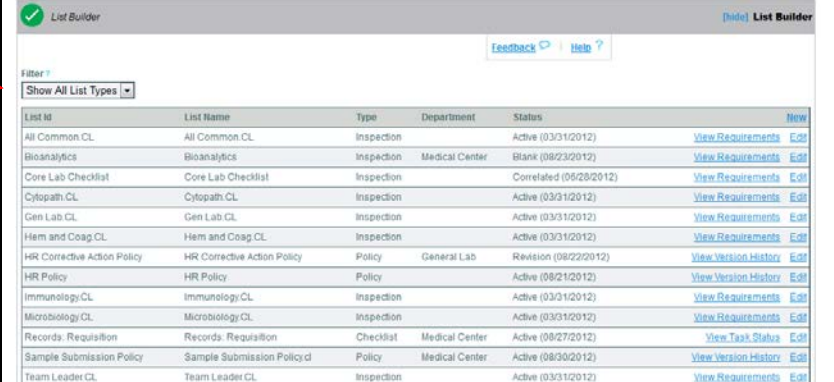
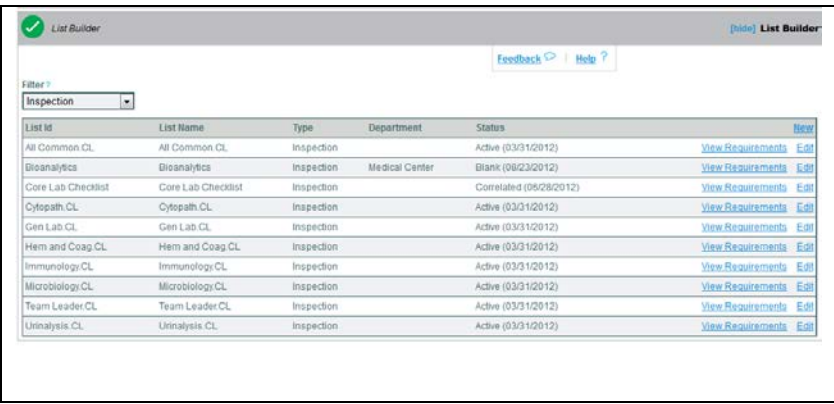
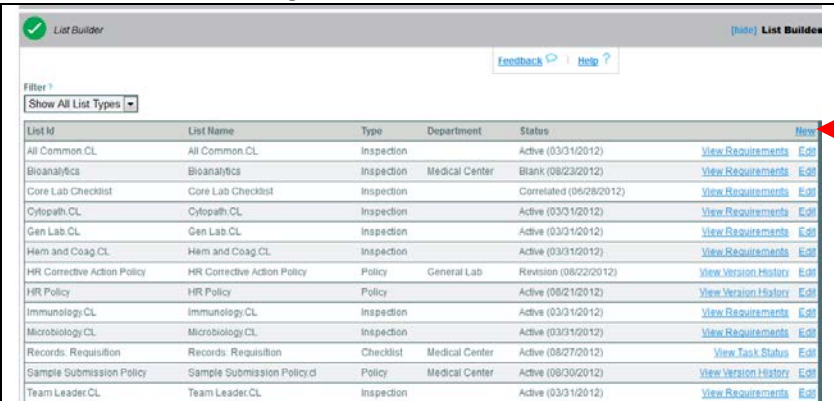
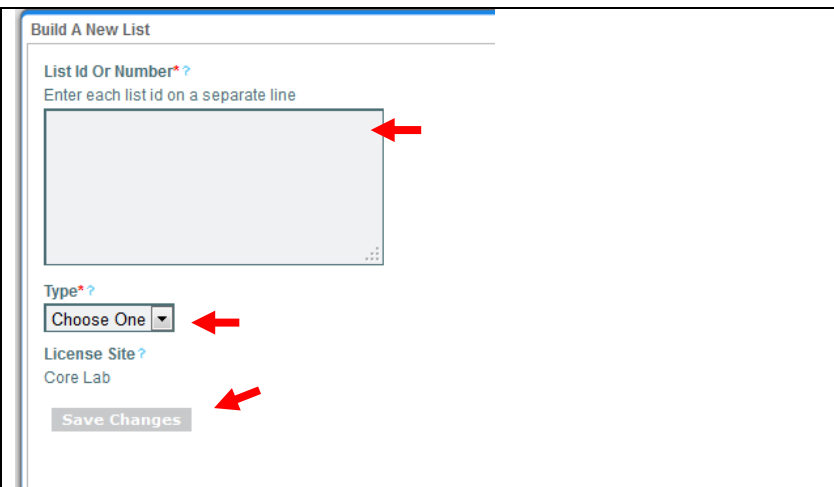
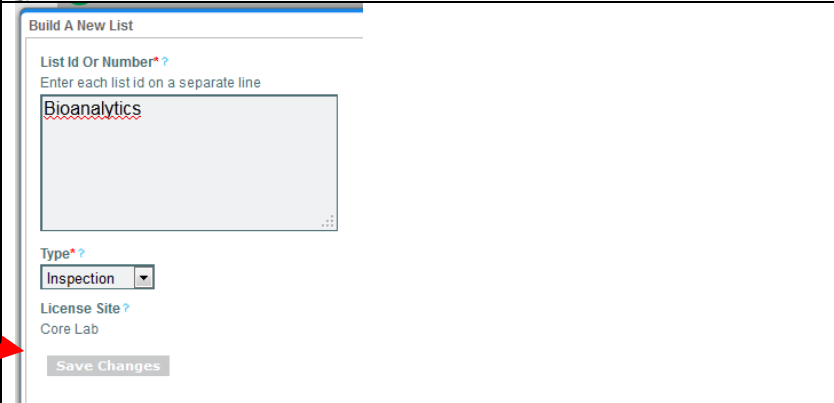
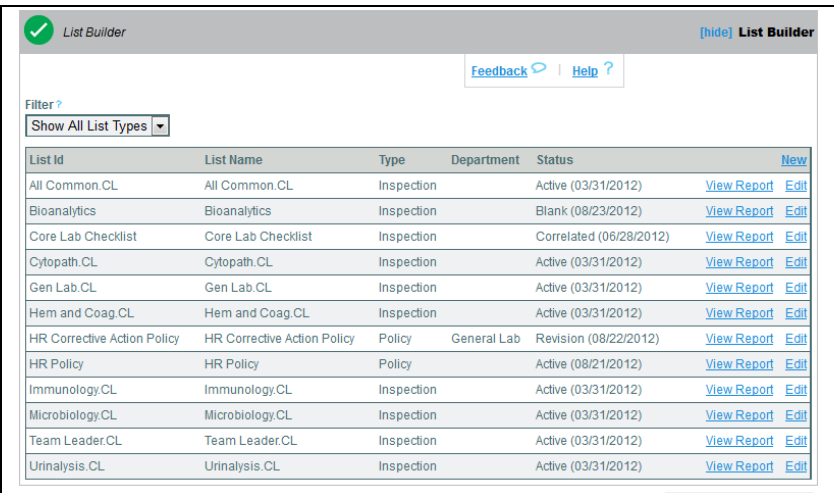
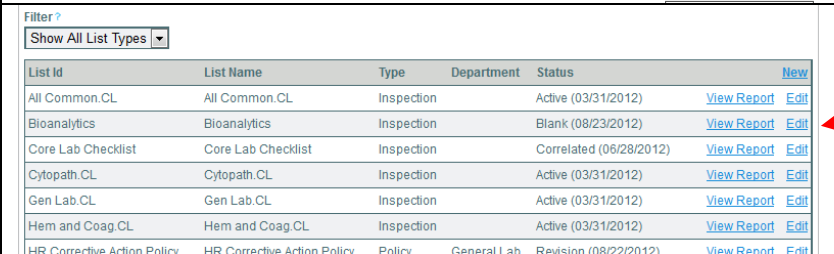
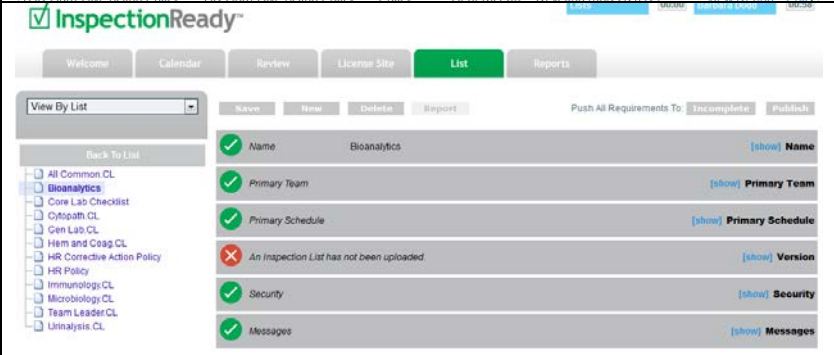
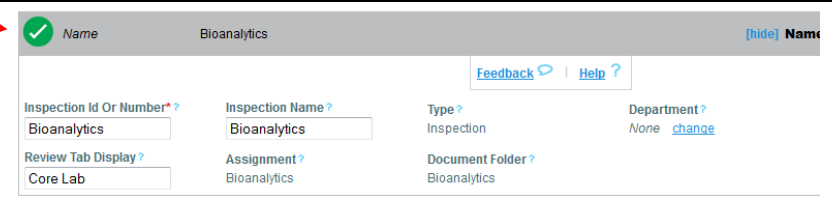

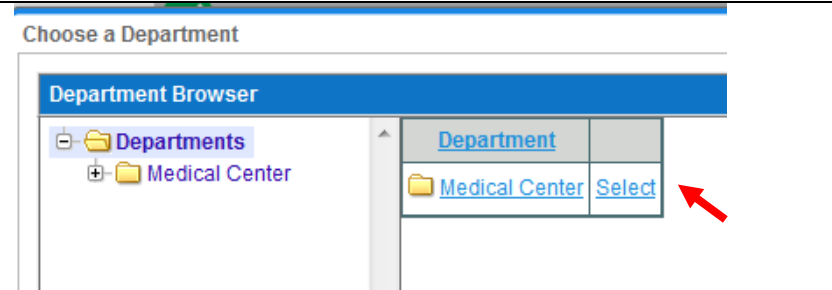
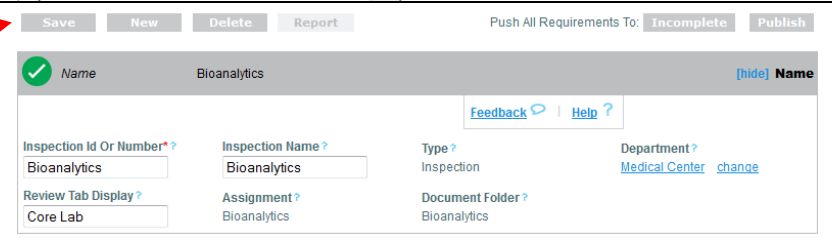


Inspection – Overview	
Step	Action
1.	Navigate to the License Site Tab .
	
2.	Select the License Site to which you want to add an Inspection List. In this example, we will add an Inspection List to the Core Lab site.
3.	Click on the List Builder color bar to expand.
	
4.	The Filter allows you to sort the Lists in the table by a specific type: Checklist, Inspection, and Policy. You may show all Lists again by choosing Show All List Types.
	

<p>5. When selecting Inspection as a Filter, only the Inspection Lists appear.</p> <p>If you want to view only the Policy Lists that have been created, select Policy as a Filter.</p> <p>If you want to view only the Checklists that have been created, select Checklist as a Filter.</p> <p>And again, you may view all the Lists by selecting the Show All List Types Filter.</p>	 <p>List Builder [hide] List Builder</p> <p>Feedback Help ?</p> <p>Filter ? Inspection</p> <table border="1"> <thead> <tr> <th>List Id</th> <th>List Name</th> <th>Type</th> <th>Department</th> <th>Status</th> <th>New</th> </tr> </thead> <tbody> <tr> <td>All Common CL</td> <td>All Common CL</td> <td>Inspection</td> <td></td> <td>Active (03/31/2012)</td> <td>View Requirements Edit</td> </tr> <tr> <td>Bioanalytics</td> <td>Bioanalytics</td> <td>Inspection</td> <td>Medical Center</td> <td>Blank (08/23/2012)</td> <td>View Requirements Edit</td> </tr> <tr> <td>Core Lab Checklist</td> <td>Core Lab Checklist</td> <td>Inspection</td> <td></td> <td>Correlated (06/28/2012)</td> <td>View Requirements Edit</td> </tr> <tr> <td>Cytopath CL</td> <td>Cytopath CL</td> <td>Inspection</td> <td></td> <td>Active (03/31/2012)</td> <td>View Requirements Edit</td> </tr> <tr> <td>Gen Lab CL</td> <td>Gen Lab CL</td> <td>Inspection</td> <td></td> <td>Active (03/31/2012)</td> <td>View Requirements Edit</td> </tr> <tr> <td>Hem and Coag CL</td> <td>Hem and Coag CL</td> <td>Inspection</td> <td></td> <td>Active (03/31/2012)</td> <td>View Requirements Edit</td> </tr> <tr> <td>Immunology CL</td> <td>Immunology CL</td> <td>Inspection</td> <td></td> <td>Active (03/31/2012)</td> <td>View Requirements Edit</td> </tr> <tr> <td>Microbiology CL</td> <td>Microbiology CL</td> <td>Inspection</td> <td></td> <td>Active (03/31/2012)</td> <td>View Requirements Edit</td> </tr> <tr> <td>Team Leader CL</td> <td>Team Leader CL</td> <td>Inspection</td> <td></td> <td>Active (03/31/2012)</td> <td>View Requirements Edit</td> </tr> <tr> <td>Urinalysis CL</td> <td>Urinalysis CL</td> <td>Inspection</td> <td></td> <td>Active (03/31/2012)</td> <td>View Requirements Edit</td> </tr> </tbody> </table>	List Id	List Name	Type	Department	Status	New	All Common CL	All Common CL	Inspection		Active (03/31/2012)	View Requirements Edit	Bioanalytics	Bioanalytics	Inspection	Medical Center	Blank (08/23/2012)	View Requirements Edit	Core Lab Checklist	Core Lab Checklist	Inspection		Correlated (06/28/2012)	View Requirements Edit	Cytopath CL	Cytopath CL	Inspection		Active (03/31/2012)	View Requirements Edit	Gen Lab CL	Gen Lab CL	Inspection		Active (03/31/2012)	View Requirements Edit	Hem and Coag CL	Hem and Coag CL	Inspection		Active (03/31/2012)	View Requirements Edit	Immunology CL	Immunology CL	Inspection		Active (03/31/2012)	View Requirements Edit	Microbiology CL	Microbiology CL	Inspection		Active (03/31/2012)	View Requirements Edit	Team Leader CL	Team Leader CL	Inspection		Active (03/31/2012)	View Requirements Edit	Urinalysis CL	Urinalysis CL	Inspection		Active (03/31/2012)	View Requirements Edit																		
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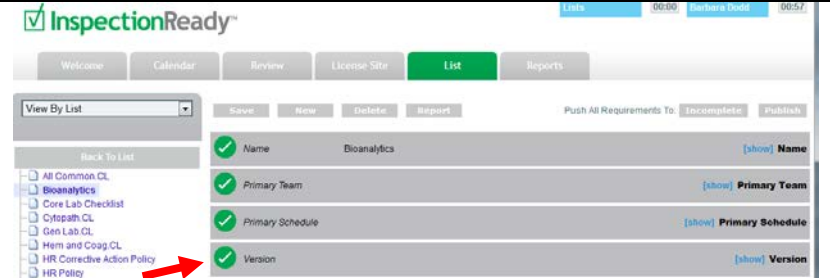
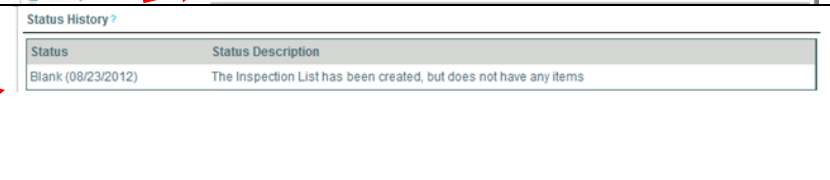
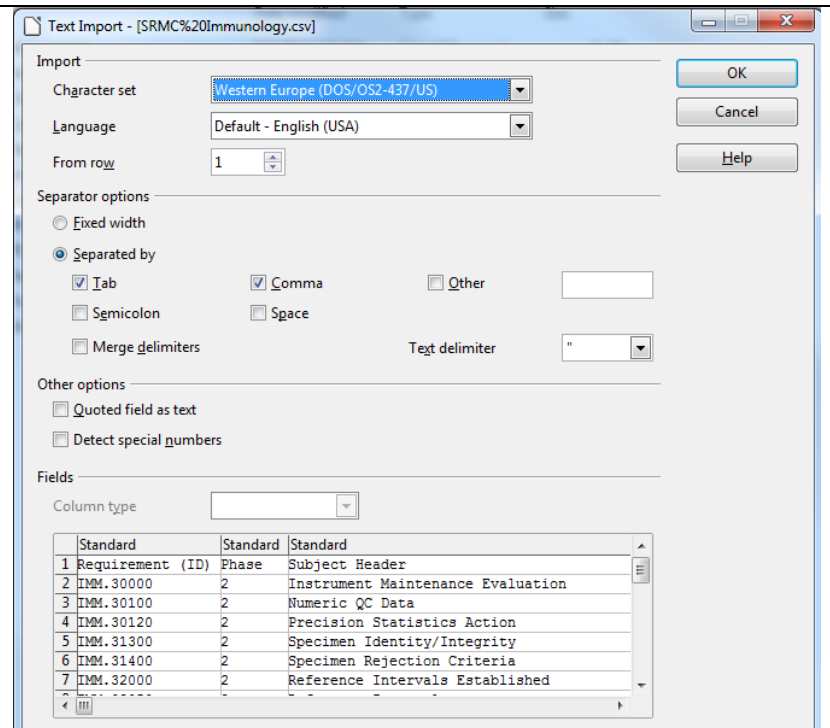
<p>8.</p>	<p>In the Build a New List window, enter the ID or Number of the New List. This field allows you to give the list a short 30-character name or number. It is displayed in the ID column when you first open the List Tab. Each line you set in this text area will create a new list allowing you to rapidly add lists.</p> <p>In this example, we will only be adding one Inspection List.</p> <p>At the Type drop-down menu, select Inspection.</p> <p>InspectionReady tells you this list is for the Core Lab License Site.</p>	
<p>9.</p>	<p>Select Save Changes.</p>	

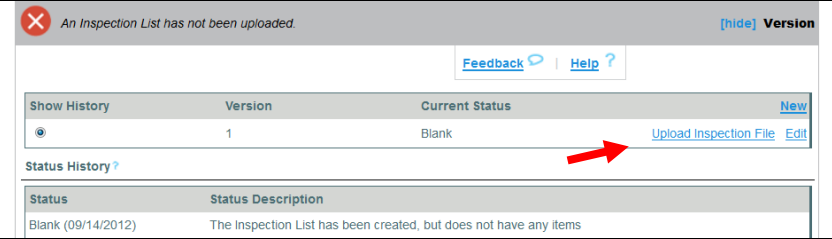
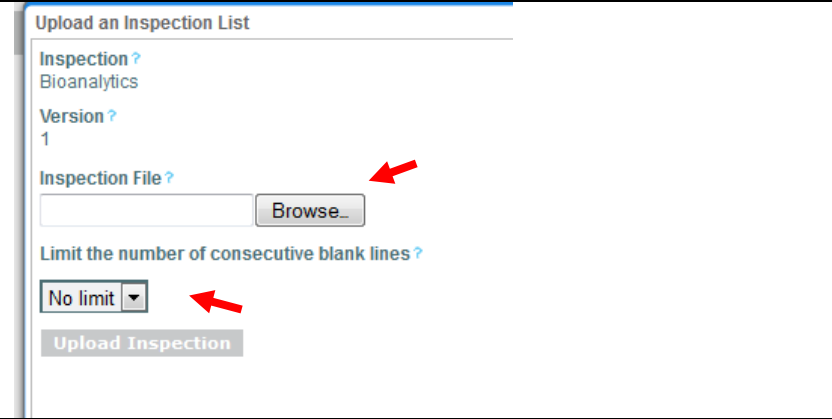
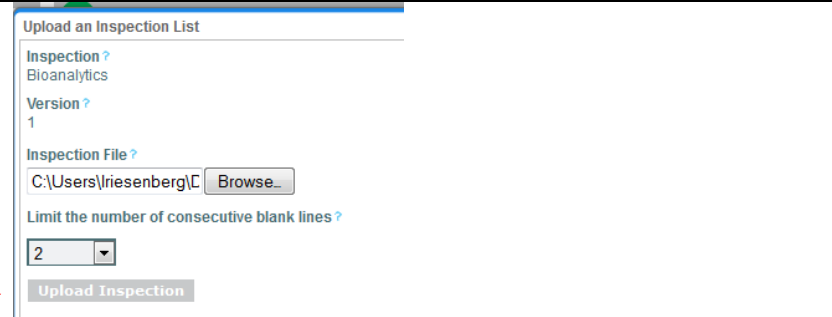
<p>10.</p>	<p>You are now taken back to the List Builder color bar. The new list created, Bioanalytics, is in the list.</p>	 <p>List Builder [Hide] List Builder</p> <p>Feedback Help ?</p> <p>Filter ? <input type="text" value="Show All List Types"/></p> <table border="1"> <thead> <tr> <th>List Id</th> <th>List Name</th> <th>Type</th> <th>Department</th> <th>Status</th> <th></th> </tr> </thead> <tbody> <tr> <td>All Common.CL</td> <td>All Common.CL</td> <td>Inspection</td> <td></td> <td>Active (03/31/2012)</td> <td>View Report Edit</td> </tr> <tr> <td>Bioanalytics</td> <td>Bioanalytics</td> <td>Inspection</td> <td></td> <td>Blank (08/23/2012)</td> <td>View Report Edit</td> </tr> <tr> <td>Core Lab Checklist</td> <td>Core Lab Checklist</td> <td>Inspection</td> <td></td> <td>Correlated (06/28/2012)</td> <td>View Report Edit</td> </tr> <tr> <td>Cytopath.CL</td> <td>Cytopath.CL</td> <td>Inspection</td> <td></td> <td>Active (03/31/2012)</td> <td>View Report Edit</td> </tr> <tr> <td>Gen Lab.CL</td> <td>Gen Lab.CL</td> <td>Inspection</td> <td></td> <td>Active (03/31/2012)</td> <td>View Report Edit</td> </tr> <tr> <td>Hem and Coag.CL</td> <td>Hem and Coag.CL</td> <td>Inspection</td> <td></td> <td>Active (03/31/2012)</td> <td>View Report Edit</td> </tr> <tr> <td>HR Corrective Action Policy</td> <td>HR Corrective Action Policy</td> <td>Policy</td> <td>General Lab</td> <td>Revision (08/22/2012)</td> <td>View Report Edit</td> </tr> <tr> <td>HR Policy</td> <td>HR Policy</td> <td>Policy</td> <td></td> <td>Active (08/21/2012)</td> <td>View Report Edit</td> </tr> <tr> <td>Immunology.CL</td> <td>Immunology.CL</td> <td>Inspection</td> <td></td> <td>Active (03/31/2012)</td> <td>View Report Edit</td> </tr> <tr> <td>Microbiology.CL</td> <td>Microbiology.CL</td> <td>Inspection</td> <td></td> <td>Active (03/31/2012)</td> <td>View Report Edit</td> </tr> <tr> <td>Team Leader.CL</td> <td>Team Leader.CL</td> <td>Inspection</td> <td></td> <td>Active (03/31/2012)</td> <td>View Report Edit</td> </tr> <tr> <td>Urinalysis.CL</td> <td>Urinalysis.CL</td> <td>Inspection</td> <td></td> <td>Active (03/31/2012)</td> <td>View Report Edit</td> </tr> </tbody> </table>	List Id	List Name	Type	Department	Status		All Common.CL	All Common.CL	Inspection		Active (03/31/2012)	View Report Edit	Bioanalytics	Bioanalytics	Inspection		Blank (08/23/2012)	View Report Edit	Core Lab Checklist	Core Lab Checklist	Inspection		Correlated (06/28/2012)	View Report Edit	Cytopath.CL	Cytopath.CL	Inspection		Active (03/31/2012)	View Report Edit	Gen Lab.CL	Gen Lab.CL	Inspection		Active (03/31/2012)	View Report Edit	Hem and Coag.CL	Hem and Coag.CL	Inspection		Active (03/31/2012)	View Report Edit	HR Corrective Action Policy	HR Corrective Action Policy	Policy	General Lab	Revision (08/22/2012)	View Report Edit	HR Policy	HR Policy	Policy		Active (08/21/2012)	View Report Edit	Immunology.CL	Immunology.CL	Inspection		Active (03/31/2012)	View Report Edit	Microbiology.CL	Microbiology.CL	Inspection		Active (03/31/2012)	View Report Edit	Team Leader.CL	Team Leader.CL	Inspection		Active (03/31/2012)	View Report Edit	Urinalysis.CL	Urinalysis.CL	Inspection		Active (03/31/2012)	View Report Edit
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Cytopath.CL	Cytopath.CL	Inspection		Active (03/31/2012)	View Report Edit																																																																											
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HR Corrective Action Policy	HR Corrective Action Policy	Policy	General Lab	Revision (08/22/2012)	View Report Edit																																																																											
<p>12.</p>	<p>Using the color bars, we will now build this List.</p>	 <p>InspectionReady</p> <p>Welcome Calendar Review License Site List Reports</p> <p>View By List</p> <p>Save New Delete Report Push All Requirements To: <input type="button" value="Incomplete"/> <input type="button" value="Publish"/></p> <p>Back To List</p> <ul style="list-style-type: none"> <input checked="" type="checkbox"/> Name [show] Name <input checked="" type="checkbox"/> Primary Team [show] Primary Team <input checked="" type="checkbox"/> Primary Schedule [show] Primary Schedule <input type="checkbox"/> An Inspection List has not been uploaded [show] Version <input checked="" type="checkbox"/> Security [show] Security <input checked="" type="checkbox"/> Messages [show] Messages 																																																																														

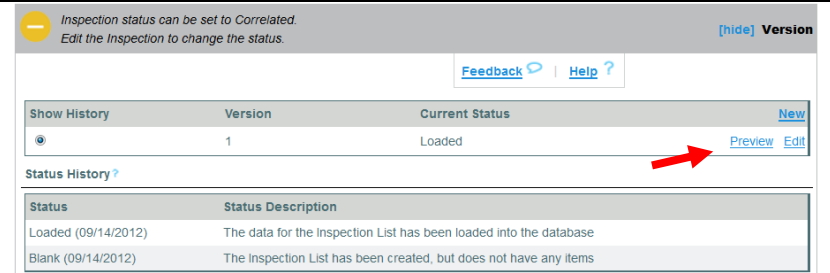
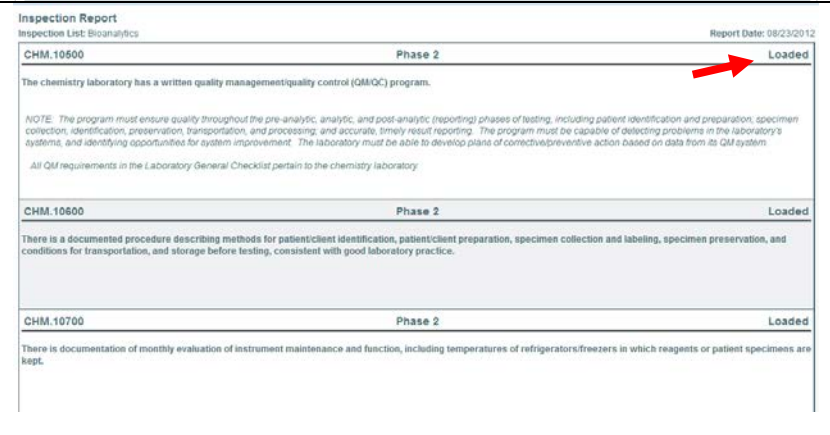
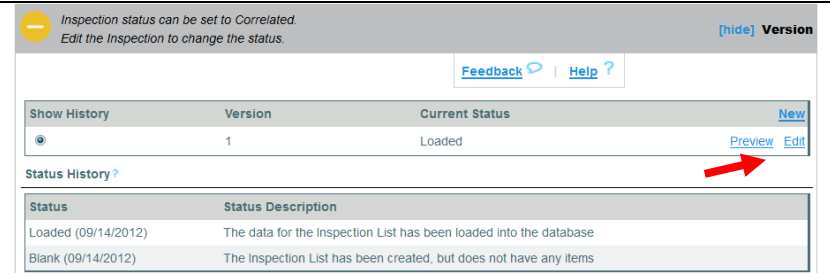
13.	<p>Select the Name color bar to expand. Here you will see the ID or Number and the Name of the List. The type of List is Inspection.</p>	
14.	<p>Department: This shows the department that the Inspection is associated with. This is an option field for you to use. InspectionReady sets None as a default when a new List is created. To change the department, select the Change link.</p>	
15.	<p>Select Medical Center department by choosing Select. (See Quick Reference Department Set Up for instructions on how to set up a department.)</p>	
16.	<p>Select Save.</p>	

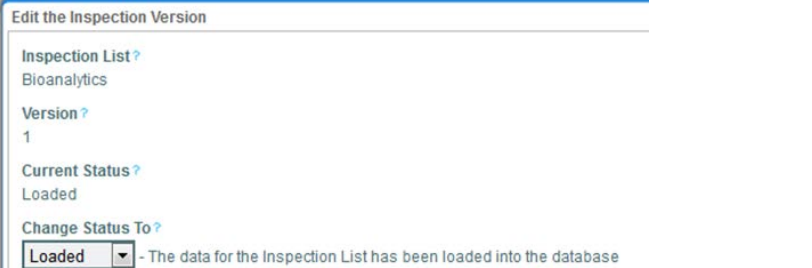
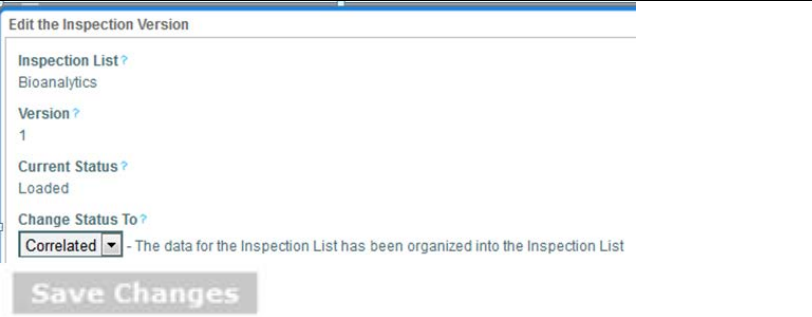
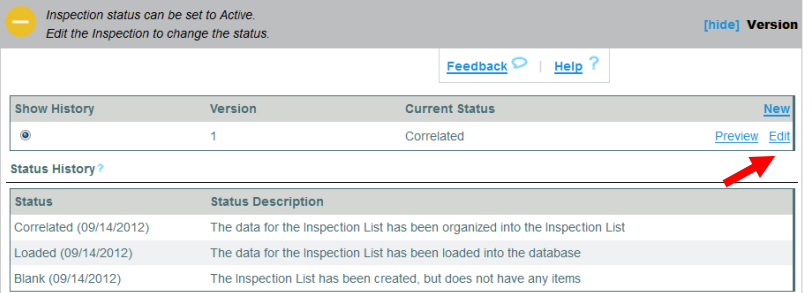
<p>17.</p>	<p>Select the Primary Team color bar to expand.</p> <p>We want to change the Team that will be the default team for the tasks for this Inspection List.</p> <p>Select Change.</p>																					
<p>18.</p>	<p>Just a reminder, the teams are created in the License Site Tab/ Team Builder color bar. The Quick Reference Inspection - Team Builder gives instructions on how to build or edit a team.</p> <p>To select the team for this Inspection, Select Bioanalytics.</p>	<table border="1"> <thead> <tr> <th>Team</th> <th>Team Members</th> <th>Type</th> <th>Creator</th> </tr> </thead> <tbody> <tr> <td>Bioanalytics</td> <td>Nadine Juarez</td> <td>Auto-Updating</td> <td>-</td> </tr> <tr> <td>Bioanalytics Admin</td> <td>Terri Sullivan</td> <td>Auto-Updating</td> <td>-</td> </tr> <tr> <td>Operations Manager</td> <td>Cathy Murphy</td> <td>Auto-Updating</td> <td>-</td> </tr> <tr> <td>Policy Manager</td> <td>Barbara Dodd</td> <td>Auto-Updating</td> <td>-</td> </tr> </tbody> </table>	Team	Team Members	Type	Creator	Bioanalytics	Nadine Juarez	Auto-Updating	-	Bioanalytics Admin	Terri Sullivan	Auto-Updating	-	Operations Manager	Cathy Murphy	Auto-Updating	-	Policy Manager	Barbara Dodd	Auto-Updating	-
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<p>19.</p>	<p>You are now back to the Primary Team color bar and can see the information for this team.</p>																					
<p>20.</p>	<p>Select the Primary Schedule color bar to expand.</p> <p>InspectionReady sets a default schedule. To change the schedule, select Change.</p>	<table border="1"> <thead> <tr> <th>Schedule Item</th> <th>Start Date</th> </tr> </thead> <tbody> <tr> <td>Initial Review</td> <td>12/29/2011</td> </tr> <tr> <td>Annual Review</td> <td>12/29/2012</td> </tr> </tbody> </table>	Schedule Item	Start Date	Initial Review	12/29/2011	Annual Review	12/29/2012														
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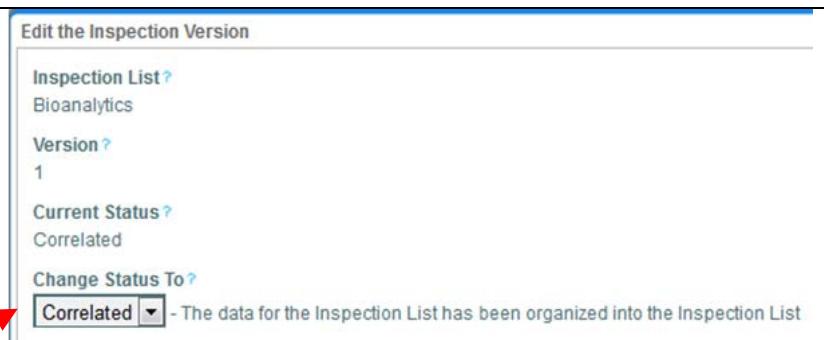
<p>21.</p>	<p>To select the schedule you would like to use, highlight the correct License Site Folder. Next choose Select for the Schedule CoreLab.Annual.9.1.12.</p>	
<p>22.</p>	<p>This is the schedule for the Bioanalytics Inspection for Core Lab. If you want to make changes on the schedule, please refer to the Quick Reference License Site - Primary Schedule.</p>	
<p>23.</p>	<p>Select Save.</p>	

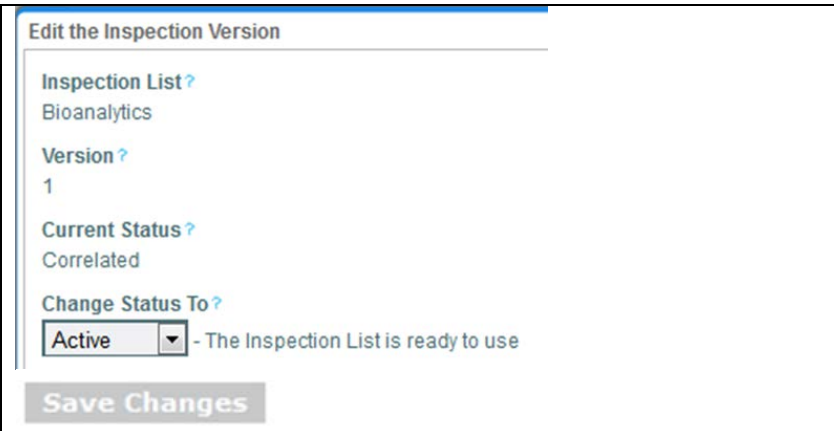
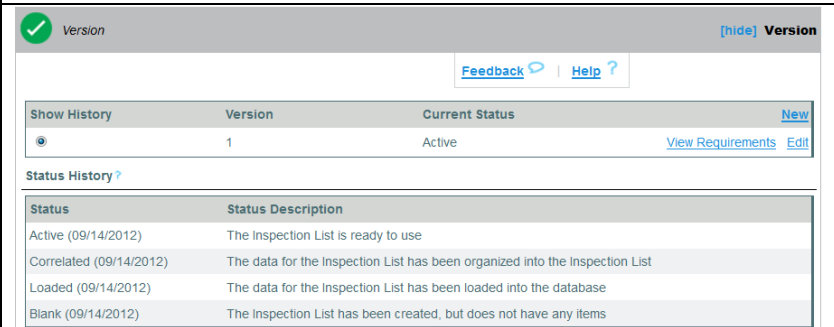
24.	Click on the Version color bar to expand.	
25.	InspectionReady tells us that we have created the Bioanalytics Inspection List, but that it does not have any items. The status is Blank.	
26.	Before you are able to load a new Inspection List, let's address the format the file must be in. The file must be in a CAP format. To load the file into this system, it must have all the rows above the titled row (Requirement (ID), Phase, Subject Header etc.) deleted. The file must be saved as a CSV (comma delimited) file. The "tab" and "comma" for Separated by should be selected.	

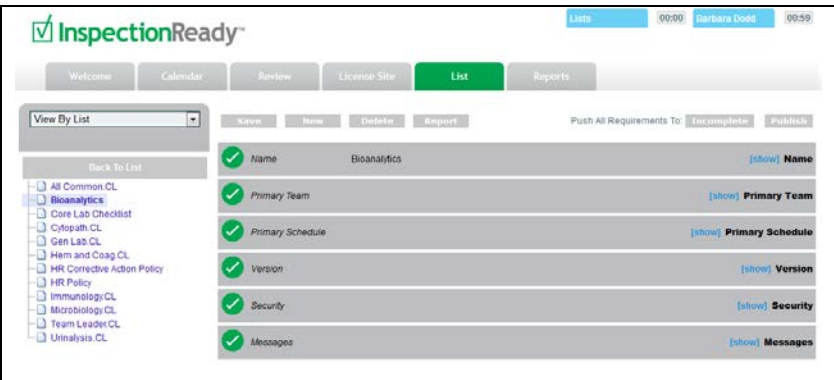

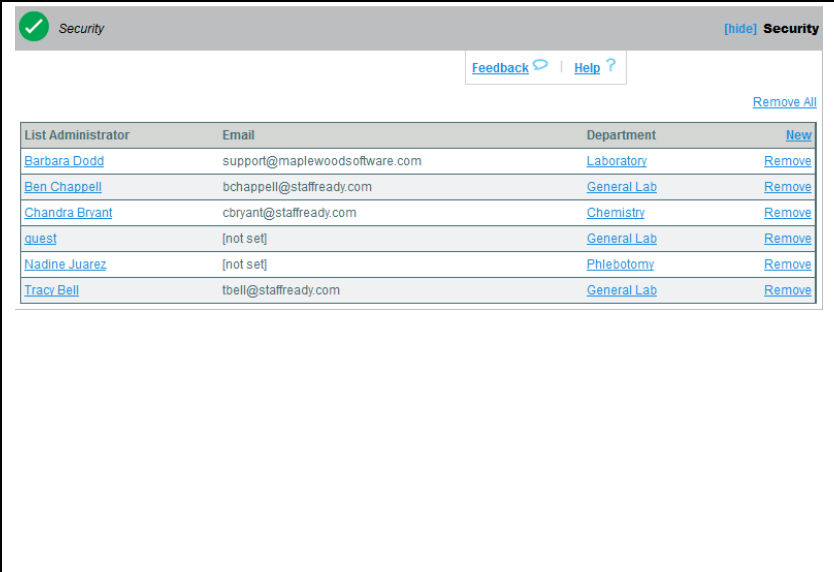
<p>27.</p>	<p>Now we will load the Bioanalytics Inspection List.</p> <p>Select Upload Inspection File.</p>	
<p>28.</p>	<p>In the Upload Inspection List window, select Browse and select the Inspection List you want to upload – Bioanalytics.</p> <p>Select the number 2 at the drop-down menu for Limit the number of consecutive blank lines. Limiting blank lines reduces the number of blank lines in your Inspection List. This condenses your list by removing additional lines over the given number you specify. You may leave this set to No limit to not condense the list. However, we recommend condensing the list by using a limit of 2 or 3 blank lines.</p>	
<p>29.</p>	<p>Select Upload Inspection.</p>	

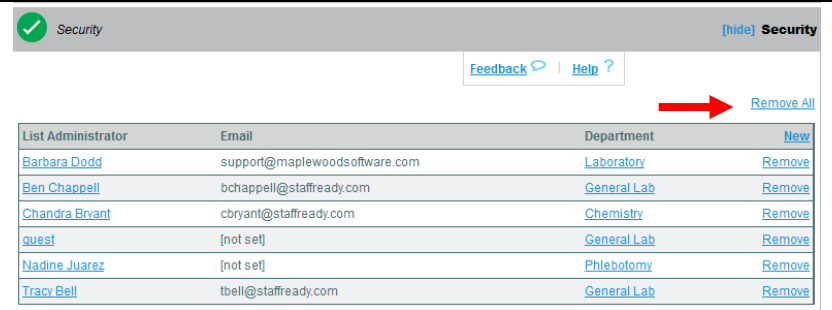
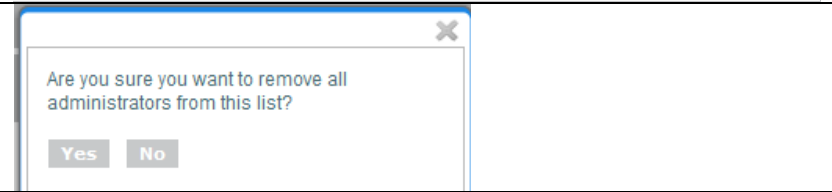
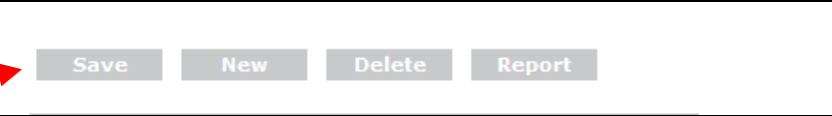
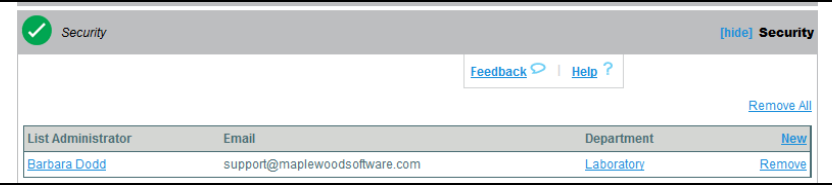
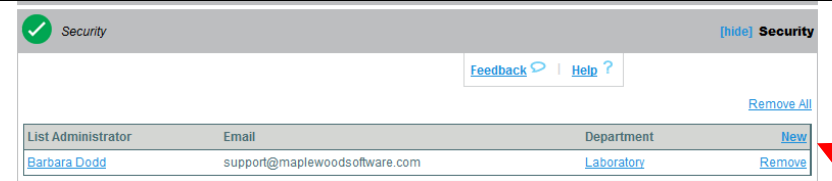
30.	<p>At this time, you can Preview the checklist by selecting Preview.</p>	 <p>Inspection status can be set to Correlated. Edit the Inspection to change the status. [hide] Version</p> <p>Feedback Help ?</p> <table border="1"> <thead> <tr> <th>Show History</th> <th>Version</th> <th>Current Status</th> <th>New</th> </tr> </thead> <tbody> <tr> <td>1</td> <td>1</td> <td>Loaded</td> <td>Preview Edit</td> </tr> </tbody> </table> <p>Status History ?</p> <table border="1"> <thead> <tr> <th>Status</th> <th>Status Description</th> </tr> </thead> <tbody> <tr> <td>Loaded (09/14/2012)</td> <td>The data for the Inspection List has been loaded into the database</td> </tr> <tr> <td>Blank (09/14/2012)</td> <td>The Inspection List has been created, but does not have any items</td> </tr> </tbody> </table>	Show History	Version	Current Status	New	1	1	Loaded	Preview Edit	Status	Status Description	Loaded (09/14/2012)	The data for the Inspection List has been loaded into the database	Blank (09/14/2012)	The Inspection List has been created, but does not have any items
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31.	<p>The Inspection Report shows all the requirements of the Checklist as well as the status, which in this example is Loaded. This status will change as we move forward.</p> <p>The statuses are: <u>Blank</u> : List created but does not have any items. <u>Loaded</u>: List has been loaded to InspectionReady. <u>Correlated</u>: Data for the List has been organized into the list. <u>Active</u>: Inspection List is ready to use.</p> <p>To leave this page, click X.</p>	 <p>Inspection Report Inspection List: Bioanalytics Report Date: 08/23/2012</p> <p>CHM.10500 Phase 2 Loaded</p> <p>The chemistry laboratory has a written quality management/quality control (QM/QC) program.</p> <p>NOTE: The program must ensure quality throughout the pre-analytic, analytic, and post-analytic (reporting) phases of testing, including patient identification and preparation, specimen collection, identification, preservation, transportation, and processing, and accurate, timely result reporting. The program must be capable of detecting problems in the laboratory's systems, and identifying opportunities for system improvement. The laboratory must be able to develop plans of corrective/preventive action based on data from its QM system.</p> <p>All QM requirements in the Laboratory General Checklist pertain to the chemistry laboratory.</p> <p>CHM.10600 Phase 2 Loaded</p> <p>There is a documented procedure describing methods for patient/client identification, patient/client preparation, specimen collection and labeling, specimen preservation, and conditions for transportation, and storage before testing, consistent with good laboratory practice.</p> <p>CHM.10700 Phase 2 Loaded</p> <p>There is documentation of monthly evaluation of instrument maintenance and function, including temperatures of refrigerators/freezers in which reagents or patient specimens are kept.</p>														
32.	<p>Select Edit.</p>	 <p>Inspection status can be set to Correlated. Edit the Inspection to change the status. [hide] Version</p> <p>Feedback Help ?</p> <table border="1"> <thead> <tr> <th>Show History</th> <th>Version</th> <th>Current Status</th> <th>New</th> </tr> </thead> <tbody> <tr> <td>1</td> <td>1</td> <td>Loaded</td> <td>Preview Edit</td> </tr> </tbody> </table> <p>Status History ?</p> <table border="1"> <thead> <tr> <th>Status</th> <th>Status Description</th> </tr> </thead> <tbody> <tr> <td>Loaded (09/14/2012)</td> <td>The data for the Inspection List has been loaded into the database</td> </tr> <tr> <td>Blank (09/14/2012)</td> <td>The Inspection List has been created, but does not have any items</td> </tr> </tbody> </table>	Show History	Version	Current Status	New	1	1	Loaded	Preview Edit	Status	Status Description	Loaded (09/14/2012)	The data for the Inspection List has been loaded into the database	Blank (09/14/2012)	The Inspection List has been created, but does not have any items
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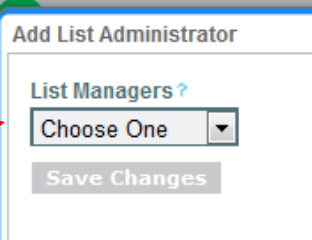
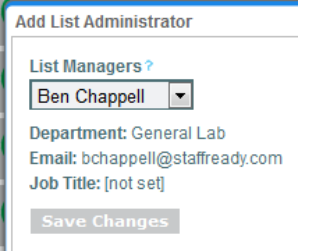
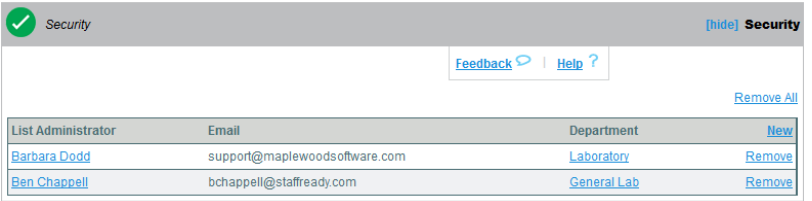
33.	In the Edit the Inspection Version window, change the Status of the Inspection List to Correlated by using the drop-down Change Status To.	
34.	Select Save Changes .	
35.	The Version color bar leads to the next step, to set the status to Active by selecting Edit .	

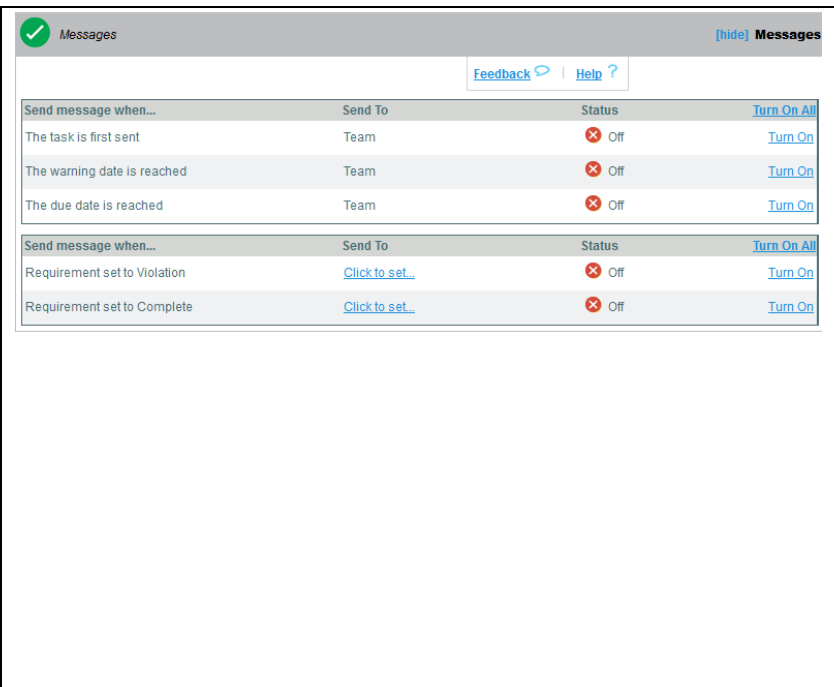
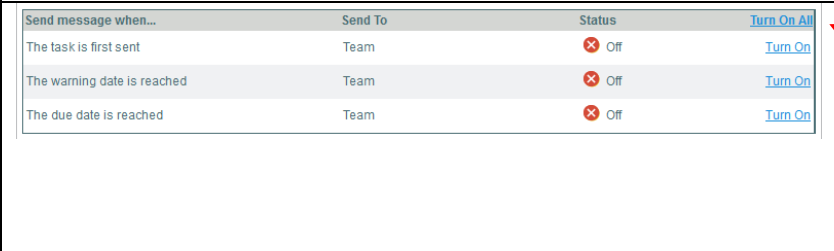
36.	Change the status of the list by selecting Active in the drop-down menu for Change Status To.	 A screenshot of a web form titled "Edit the Inspection Version". The form contains several fields: "Inspection List ?" with the value "Bioanalytics"; "Version ?" with the value "1"; "Current Status ?" with the value "Correlated"; and "Change Status To ?" with a dropdown menu currently set to "Correlated". A red arrow points to the dropdown menu. Below the dropdown, there is a note: "- The data for the Inspection List has been organized into the Inspection List". <p>Inspection List ? Bioanalytics</p> <p>Version ? 1</p> <p>Current Status ? Correlated</p> <p>Change Status To ? Correlated - The data for the Inspection List has been organized into the Inspection List</p>
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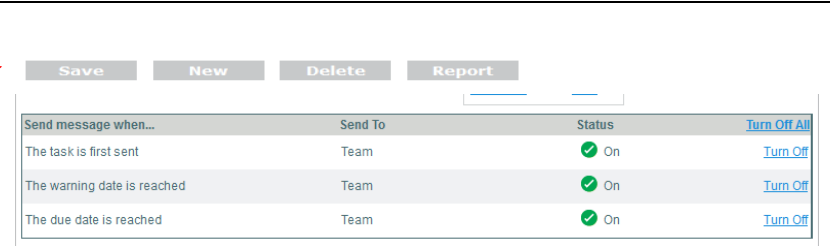
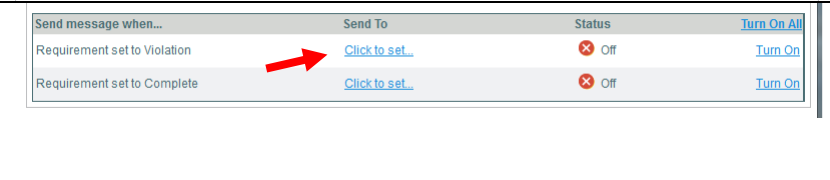
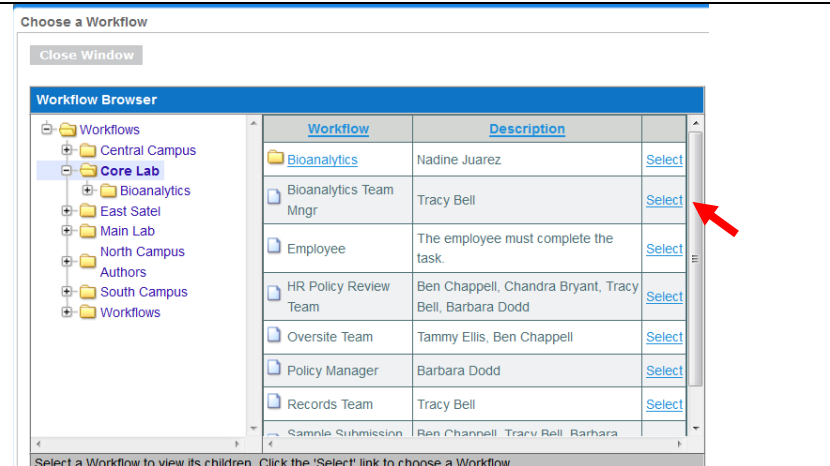
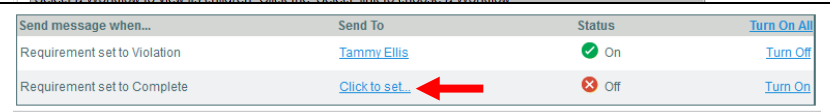
<p>37.</p>	<p>Select Save Changes.</p>	 <p>Edit the Inspection Version</p> <p>Inspection List ? Bioanalytics</p> <p>Version ? 1</p> <p>Current Status ? Correlated</p> <p>Change Status To ? Active - The Inspection List is ready to use</p> <p>Save Changes</p>																		
<p>38.</p>	<p>The Inspection List is now active and ready to use. InspectionReady shows the Status History-the past statuses of the selected version. It shows when the status began and a description of that status.</p> <p>See Quick Reference Inspection List – Updated Version for instructions to upload a new version of an existing Inspection List.</p>	 <p>Version [hide] Version</p> <p>Feedback Help</p> <table border="1"> <thead> <tr> <th>Show History</th> <th>Version</th> <th>Current Status</th> <th>New</th> </tr> </thead> <tbody> <tr> <td><input checked="" type="radio"/></td> <td>1</td> <td>Active</td> <td>View Requirements Edit</td> </tr> </tbody> </table> <p>Status History ?</p> <table border="1"> <thead> <tr> <th>Status</th> <th>Status Description</th> </tr> </thead> <tbody> <tr> <td>Active (09/14/2012)</td> <td>The Inspection List is ready to use</td> </tr> <tr> <td>Correlated (09/14/2012)</td> <td>The data for the Inspection List has been organized into the Inspection List</td> </tr> <tr> <td>Loaded (09/14/2012)</td> <td>The data for the Inspection List has been loaded into the database</td> </tr> <tr> <td>Blank (09/14/2012)</td> <td>The Inspection List has been created, but does not have any items</td> </tr> </tbody> </table>	Show History	Version	Current Status	New	<input checked="" type="radio"/>	1	Active	View Requirements Edit	Status	Status Description	Active (09/14/2012)	The Inspection List is ready to use	Correlated (09/14/2012)	The data for the Inspection List has been organized into the Inspection List	Loaded (09/14/2012)	The data for the Inspection List has been loaded into the database	Blank (09/14/2012)	The Inspection List has been created, but does not have any items
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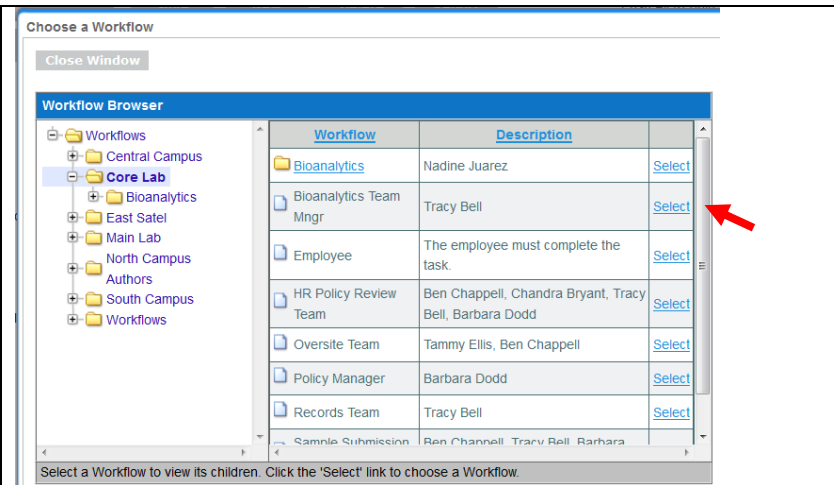
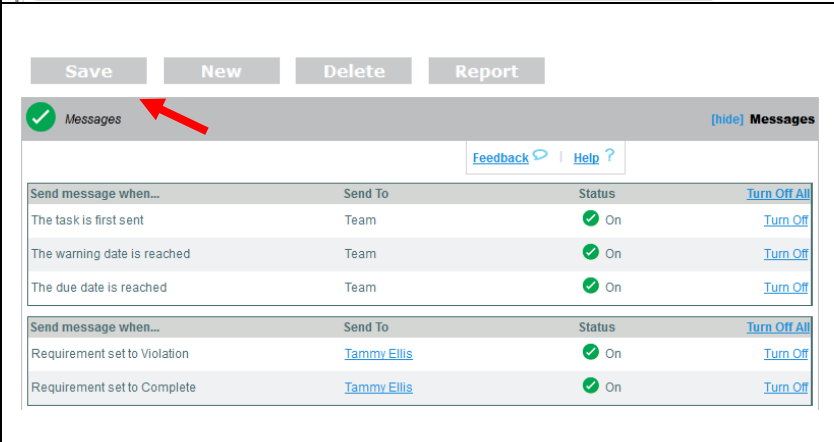
<p>39.</p>	<p>We still need to push the Bioanalytics to Incomplete – so it can then be Published. But before we do that, we will finish the color bars (Security and Messages) for this Inspection List.</p>																													
<p>40.</p>	<p>Click on the Security color bar to expand.</p>																													
<p>41.</p>	<p>This color bar is used to add privileges for users to see the Inspection. Users can be added by clicking New and searching for an employee. Users can be removed by clicking the Remove link. Some users are added automatically by StaffReady.</p> <ul style="list-style-type: none"> • Remove All: You can also remove all of the users at once by clicking Remove All. All users except yourself will be removed. • List Administrator: The names of the administrators who have access to view and edit the list. • Email: The email of the list administrator. • Department: The department of the list administrator. • New: The button allows you to add new list administrators. • Remove: The button removes a list administrator from the list. This removes their ability to view and edit the Inspection. 	 <table border="1" data-bbox="1092 893 1921 1088"> <thead> <tr> <th>List Administrator</th> <th>Email</th> <th>Department</th> <th>New</th> </tr> </thead> <tbody> <tr> <td>Barbara Dodd</td> <td>support@maplewoodssoftware.com</td> <td>Laboratory</td> <td>Remove</td> </tr> <tr> <td>Ben Chappell</td> <td>bchappell@staffready.com</td> <td>General Lab</td> <td>Remove</td> </tr> <tr> <td>Chandra Brvant</td> <td>cbryant@staffready.com</td> <td>Chemistry</td> <td>Remove</td> </tr> <tr> <td>quest</td> <td>[not set]</td> <td>General Lab</td> <td>Remove</td> </tr> <tr> <td>Nadine Juarez</td> <td>[not set]</td> <td>Phlebotomy</td> <td>Remove</td> </tr> <tr> <td>Tracy Bell</td> <td>tbell@staffready.com</td> <td>General Lab</td> <td>Remove</td> </tr> </tbody> </table>	List Administrator	Email	Department	New	Barbara Dodd	support@maplewoodssoftware.com	Laboratory	Remove	Ben Chappell	bchappell@staffready.com	General Lab	Remove	Chandra Brvant	cbryant@staffready.com	Chemistry	Remove	quest	[not set]	General Lab	Remove	Nadine Juarez	[not set]	Phlebotomy	Remove	Tracy Bell	tbell@staffready.com	General Lab	Remove
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<p>42.</p>	<p>For this Inspection List, we will select Remove All – none of the people listed should be seeing the Inspection – except for Barbara Dodd. Since I am logged in as Barbara Dodd, she is not removed from this list.</p> <p>Select Remove All.</p>	 <p>Security [hide] Security</p> <p>Feedback Help ?</p> <p>Remove All</p> <table border="1"> <thead> <tr> <th>List Administrator</th> <th>Email</th> <th>Department</th> <th>New</th> </tr> </thead> <tbody> <tr> <td>Barbara Dodd</td> <td>support@maplewoodsoftware.com</td> <td>Laboratory</td> <td>Remove</td> </tr> <tr> <td>Ben Chappell</td> <td>bchappell@staffready.com</td> <td>General Lab</td> <td>Remove</td> </tr> <tr> <td>Chandra Bryant</td> <td>cbryant@staffready.com</td> <td>Chemistry</td> <td>Remove</td> </tr> <tr> <td>quest</td> <td>[not set]</td> <td>General Lab</td> <td>Remove</td> </tr> <tr> <td>Nadine Juarez</td> <td>[not set]</td> <td>Phlebotomy</td> <td>Remove</td> </tr> <tr> <td>Tracy Bell</td> <td>tbell@staffready.com</td> <td>General Lab</td> <td>Remove</td> </tr> </tbody> </table>	List Administrator	Email	Department	New	Barbara Dodd	support@maplewoodsoftware.com	Laboratory	Remove	Ben Chappell	bchappell@staffready.com	General Lab	Remove	Chandra Bryant	cbryant@staffready.com	Chemistry	Remove	quest	[not set]	General Lab	Remove	Nadine Juarez	[not set]	Phlebotomy	Remove	Tracy Bell	tbell@staffready.com	General Lab	Remove
List Administrator	Email	Department	New																											
Barbara Dodd	support@maplewoodsoftware.com	Laboratory	Remove																											
Ben Chappell	bchappell@staffready.com	General Lab	Remove																											
Chandra Bryant	cbryant@staffready.com	Chemistry	Remove																											
quest	[not set]	General Lab	Remove																											
Nadine Juarez	[not set]	Phlebotomy	Remove																											
Tracy Bell	tbell@staffready.com	General Lab	Remove																											
<p>43.</p>	<p>InspectionReady asks if you are sure you want to do this – Select Yes.</p>	 <p>Are you sure you want to remove all administrators from this list?</p> <p>Yes No</p>																												
<p>44.</p>	<p>Select Save.</p>	 <p>Save New Delete Report</p>																												
<p>45.</p>	<p>Since I am logged in as Barbara Dodd, she is not removed from this list, and she is the List Administrator.</p>	 <p>Security [hide] Security</p> <p>Feedback Help ?</p> <p>Remove All</p> <table border="1"> <thead> <tr> <th>List Administrator</th> <th>Email</th> <th>Department</th> <th>New</th> </tr> </thead> <tbody> <tr> <td>Barbara Dodd</td> <td>support@maplewoodsoftware.com</td> <td>Laboratory</td> <td>Remove</td> </tr> </tbody> </table>	List Administrator	Email	Department	New	Barbara Dodd	support@maplewoodsoftware.com	Laboratory	Remove																				
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Barbara Dodd	support@maplewoodsoftware.com	Laboratory	Remove																											
<p>46.</p>	<p>If you would like to add someone who should see this list, select New.</p>	 <p>Security [hide] Security</p> <p>Feedback Help ?</p> <p>Remove All</p> <table border="1"> <thead> <tr> <th>List Administrator</th> <th>Email</th> <th>Department</th> <th>New</th> </tr> </thead> <tbody> <tr> <td>Barbara Dodd</td> <td>support@maplewoodsoftware.com</td> <td>Laboratory</td> <td>Remove</td> </tr> </tbody> </table>	List Administrator	Email	Department	New	Barbara Dodd	support@maplewoodsoftware.com	Laboratory	Remove																				
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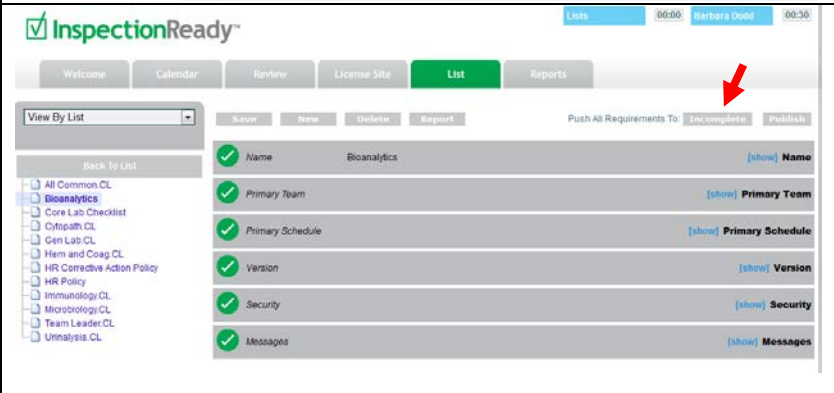
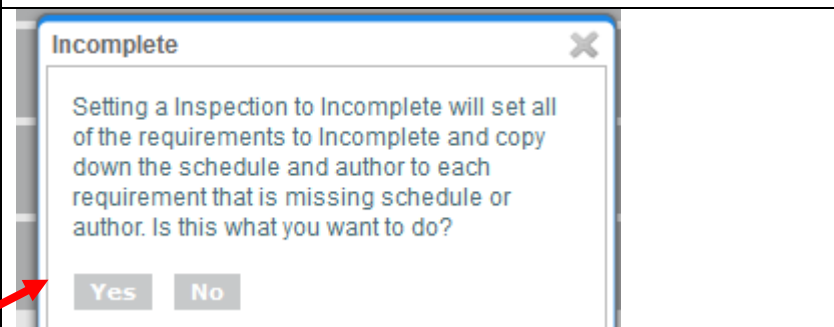
47.	Select the name from the List Manager pull down menu.	
48.	<p>We have selected Ben Chappell.</p> <p>Select Save Changes.</p>	
49.	This shows the 2 people who are the List Administrators for the Bioanalytics Inspection List. They have been given the security privileges to see this list.	

<p>50.</p>	<p>The Inspection Message Color Bar Lists the options for sending an email to the Inspection team and the workflow. Send message to Team when...</p> <ul style="list-style-type: none"> • <u>The task is first sent</u>: Sent out when the task is first sent to the team. • <u>The warning date is reached</u>: Sent out when the warning due date is reached. Sent to the team • <u>The Due date is reached</u>: Sent out when the Due Date is reached. Sent to the team. <p>Send message to list when...</p> <ul style="list-style-type: none"> • <u>Requirement set to Violation</u>: Sent when the Inspection Item is set to Violation. Sent to the workflow. • <u>Requirement set to Complete</u>: Sent when the Inspection Item is set to Complete. Sent to the workflow. • <u>Send To</u>: The employee or the selected workflow. This must be set to turn on the Message Condition. Select Click to set to pick a workflow from the workflow picker. Select a workflow name to change the workflow. 	 <p>The screenshot shows the 'Messages' configuration page. It has a header with a green checkmark, 'Messages', and a '[hide] Messages' link. Below the header are two tables. The first table lists three message conditions: 'The task is first sent', 'The warning date is reached', and 'The due date is reached'. Each row has columns for 'Send To' (Team), 'Status' (Off with a red X icon), and 'Turn On All' (Turn On link). The second table lists two message conditions: 'Requirement set to Violation' and 'Requirement set to Complete'. Each row has columns for 'Send To' (Click to set... link), 'Status' (Off with a red X icon), and 'Turn On All' (Turn On link).</p>
<p>51.</p>	<p>We have chosen to have all 3 emails sent. To do this, Select Turn On All. If you only want 1 or 2 messages sent, select Turn On to only the ones you want sent.</p> <p>Select Turn On All.</p>	 <p>The screenshot shows the 'Messages' configuration page with the same three message conditions as the previous screenshot. In this view, the 'Turn On All' link is highlighted in blue, indicating it is selected. A red arrow points to the 'Turn On All' link for the first condition, 'The task is first sent'.</p>

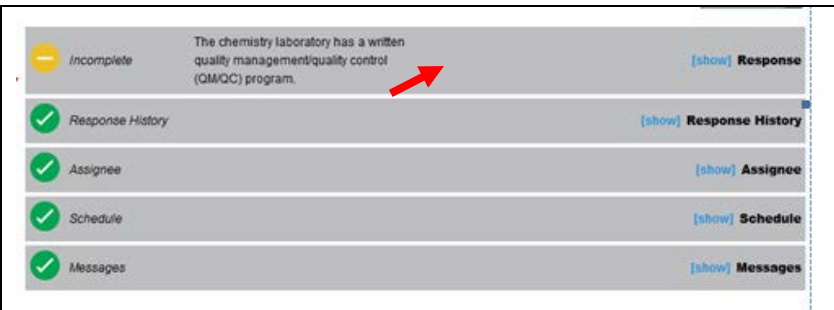
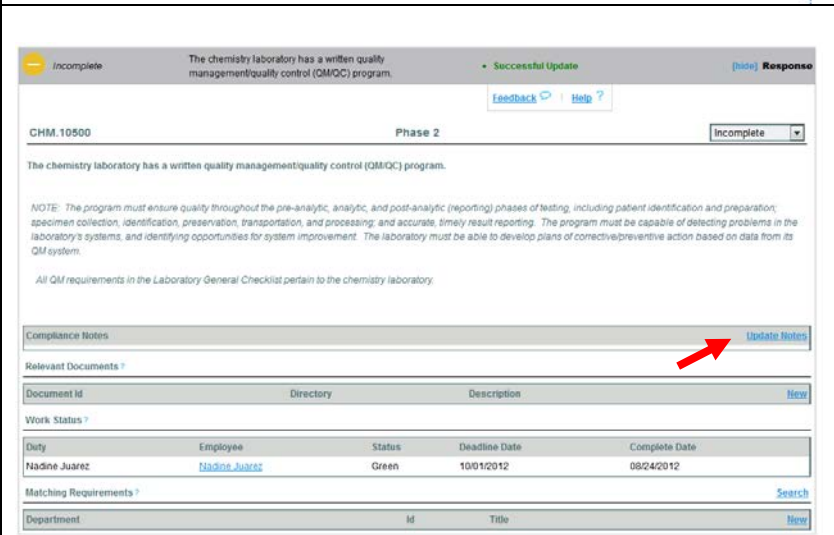
52.	Select Save.	
53.	<p>Now we decide if we want anyone (manager etc) to receive a message when the requirement is set to violation (not completed on time) or when it is completed.</p> <p>Select Click to Set.</p>	
54.	<p>Remember, these teams need to be set up in the License Site tab, Team Builder color bar.</p> <p>We are going to select Tracy Bell, by selecting Select next to her name.</p>	
55.	To select an employee to receive a message when the Requirement is set to Complete, Select Click to Set.	

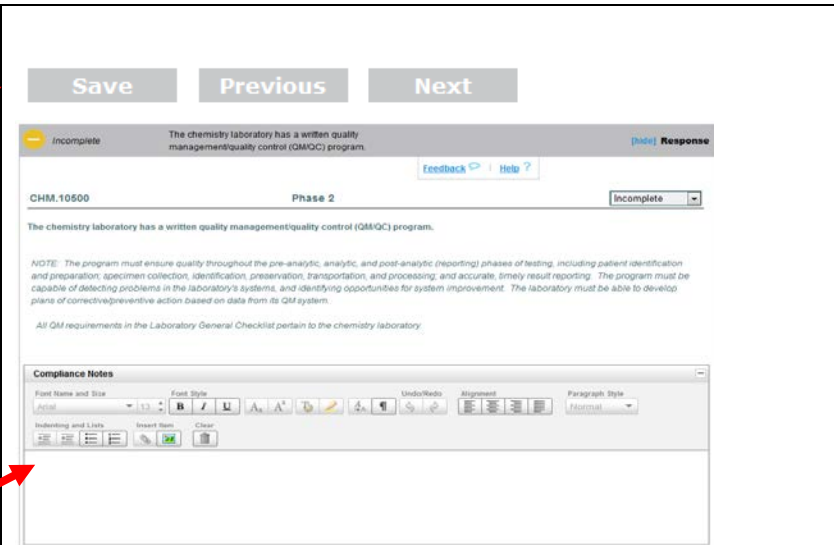
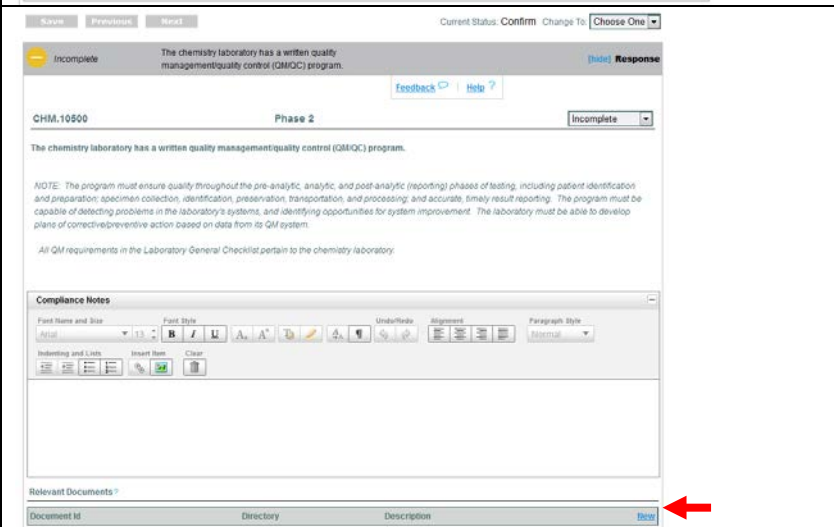
<p>56.</p>	<p>We will select Tracy Bell to receive this message, by selecting Select next to her name.</p>																													
<p>57.</p>	<p>Select Save.</p>	 <table border="1" data-bbox="1113 893 1900 1023"> <thead> <tr> <th>Send message when...</th> <th>Send To</th> <th>Status</th> <th>Turn Off All</th> </tr> </thead> <tbody> <tr> <td>The task is first sent</td> <td>Team</td> <td>On</td> <td>Turn Off</td> </tr> <tr> <td>The warning date is reached</td> <td>Team</td> <td>On</td> <td>Turn Off</td> </tr> <tr> <td>The due date is reached</td> <td>Team</td> <td>On</td> <td>Turn Off</td> </tr> </tbody> </table> <table border="1" data-bbox="1113 1031 1900 1128"> <thead> <tr> <th>Send message when...</th> <th>Send To</th> <th>Status</th> <th>Turn Off All</th> </tr> </thead> <tbody> <tr> <td>Requirement set to Violation</td> <td>Tammy Ellis</td> <td>On</td> <td>Turn Off</td> </tr> <tr> <td>Requirement set to Complete</td> <td>Tammy Ellis</td> <td>On</td> <td>Turn Off</td> </tr> </tbody> </table>	Send message when...	Send To	Status	Turn Off All	The task is first sent	Team	On	Turn Off	The warning date is reached	Team	On	Turn Off	The due date is reached	Team	On	Turn Off	Send message when...	Send To	Status	Turn Off All	Requirement set to Violation	Tammy Ellis	On	Turn Off	Requirement set to Complete	Tammy Ellis	On	Turn Off
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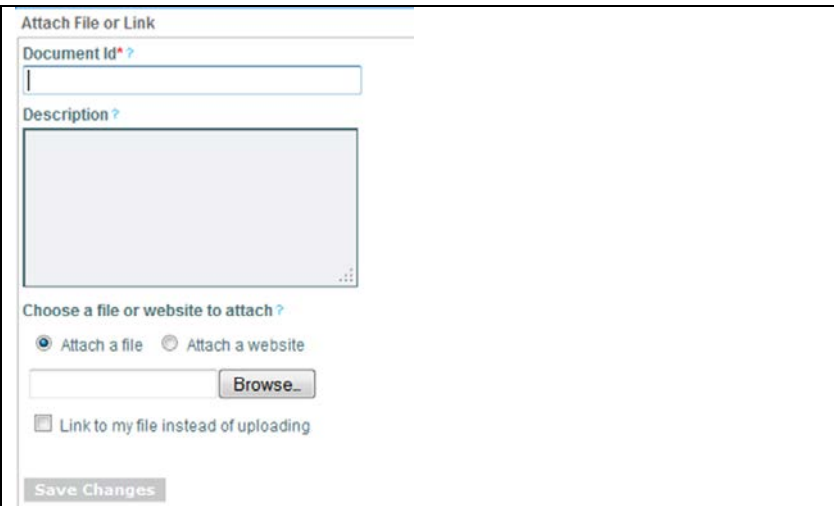
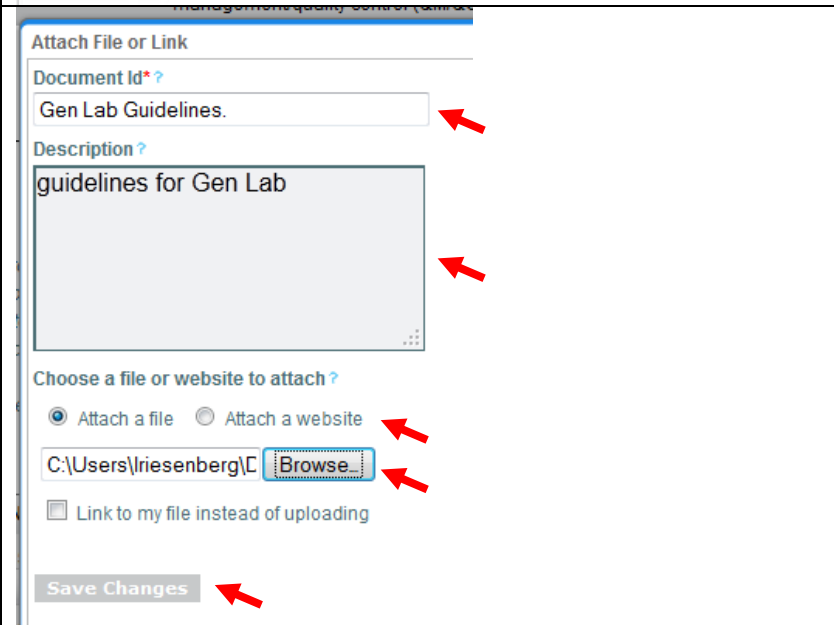
<p>58.</p>	<p>Before we push Bioanalytics Inspection List to Incomplete, let's first look at the Requirements . Select the Version color bar to expand.</p>	
<p>59.</p>	<p>Click on View Inspection List for Version 1 of the Inspection List.</p>	
<p>60.</p>	<p>This is the view <u>before</u> we push the Inspection List to Incomplete. InspectionReady guides you to the next step. Click on Back to List.</p>	

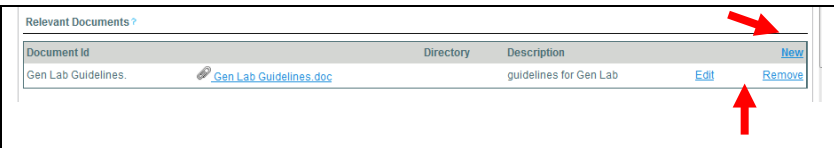
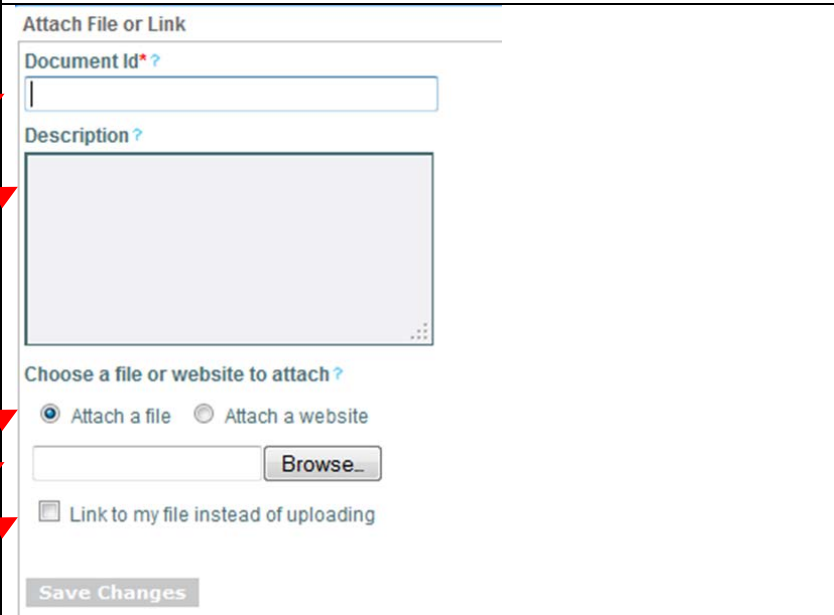
<p>61. Click on Edit for the Bioanalytics Inspection List.</p>	
<p>62. We will now push Bioanalytics Inspection List to Incomplete.</p> <p>After we have completely built the Inspection List, we are ready to push it to Incomplete. Ensure that all the color bars have a green circle – indicating that all the tasks have been completed.</p> <p>Setting an Inspection to Incomplete will set all of the requirements to Incomplete and copy down the schedule and team of each requirement that is missing a schedule or team.</p> <p>Click on Incomplete.</p>	
<p>63. InspectionReady will ask you if you want to do this – Select Yes.</p>	

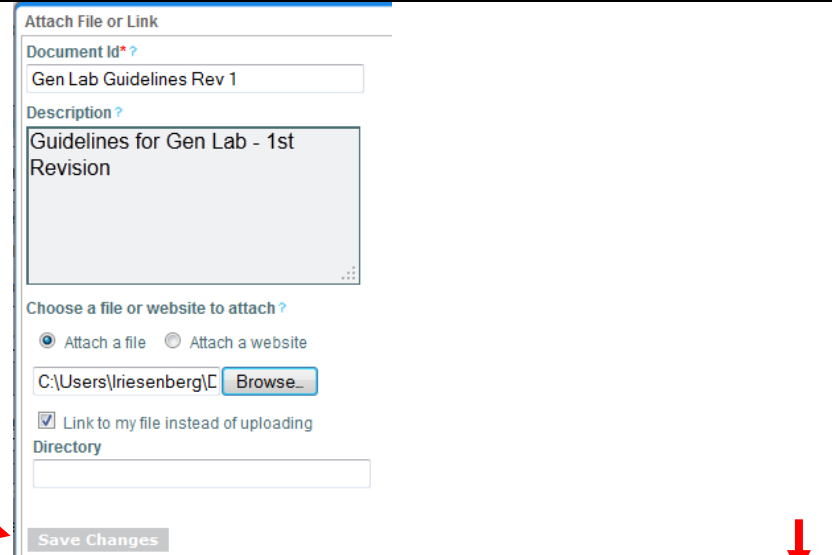
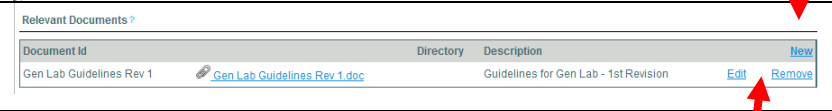
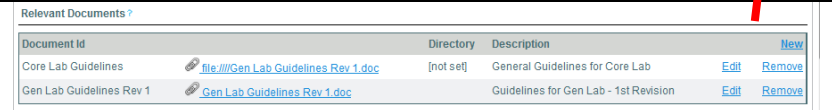
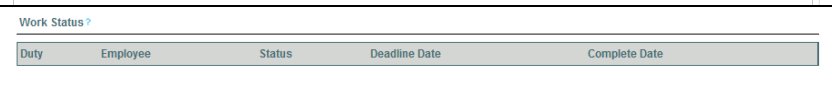
64.	You will see InspectionReady completing this process.																																																																	
65.	<p>You are taken back to the main screen.</p> <p>Select Back To List.</p>																																																																	
66.	Select View Requirements for the Bioanalytics Inspection List.	<table border="1"> <thead> <tr> <th>List ID</th> <th>List Name</th> <th>Type</th> <th>Department</th> </tr> </thead> <tbody> <tr> <td>Search ListID</td> <td>Search ListName</td> <td>Search Type</td> <td>Search Department</td> </tr> <tr> <td>All Common CL</td> <td>All Common CL</td> <td>Inspection</td> <td></td> </tr> <tr> <td>Bioanalytics</td> <td>Bioanalytics</td> <td>Inspection</td> <td>Medical Center</td> </tr> <tr> <td>Core Lab Checklist</td> <td>Core Lab Checklist</td> <td>Inspection</td> <td></td> </tr> <tr> <td>Cytopath CL</td> <td>Cytopath CL</td> <td>Inspection</td> <td></td> </tr> <tr> <td>Gen Lab CL</td> <td>Gen Lab CL</td> <td>Inspection</td> <td></td> </tr> <tr> <td>Hem and Coag CL</td> <td>Hem and Coag CL</td> <td>Inspection</td> <td></td> </tr> <tr> <td>HR Corrective Action Policy</td> <td>HR Corrective Action Policy</td> <td>Policy</td> <td>General Lab</td> </tr> <tr> <td>HR Policy</td> <td>HR Policy</td> <td>Policy</td> <td></td> </tr> <tr> <td>Immunology CL</td> <td>Immunology CL</td> <td>Inspection</td> <td></td> </tr> <tr> <td>Microbiology CL</td> <td>Microbiology CL</td> <td>Inspection</td> <td></td> </tr> <tr> <td>Records - Requisition</td> <td>Records - Requisition</td> <td>Checklist</td> <td>Medical Center</td> </tr> <tr> <td>Sample Submission Policy</td> <td>Sample Submission Policy</td> <td>Policy</td> <td>Medical Center</td> </tr> <tr> <td>Team Leader CL</td> <td>Team Leader CL</td> <td>Inspection</td> <td></td> </tr> <tr> <td>Urinalysis CL</td> <td>Urinalysis CL</td> <td>Inspection</td> <td></td> </tr> </tbody> </table>	List ID	List Name	Type	Department	Search ListID	Search ListName	Search Type	Search Department	All Common CL	All Common CL	Inspection		Bioanalytics	Bioanalytics	Inspection	Medical Center	Core Lab Checklist	Core Lab Checklist	Inspection		Cytopath CL	Cytopath CL	Inspection		Gen Lab CL	Gen Lab CL	Inspection		Hem and Coag CL	Hem and Coag CL	Inspection		HR Corrective Action Policy	HR Corrective Action Policy	Policy	General Lab	HR Policy	HR Policy	Policy		Immunology CL	Immunology CL	Inspection		Microbiology CL	Microbiology CL	Inspection		Records - Requisition	Records - Requisition	Checklist	Medical Center	Sample Submission Policy	Sample Submission Policy	Policy	Medical Center	Team Leader CL	Team Leader CL	Inspection		Urinalysis CL	Urinalysis CL	Inspection	
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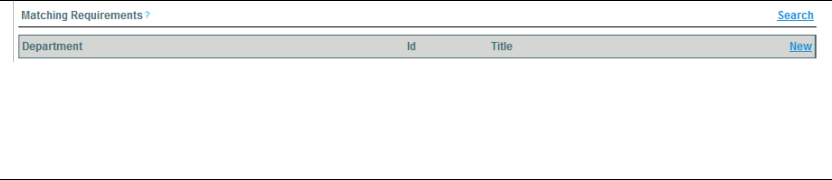

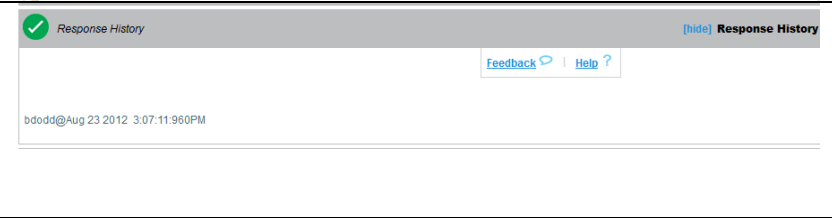
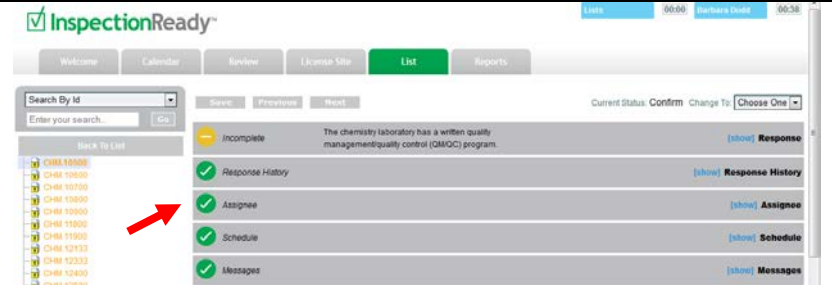
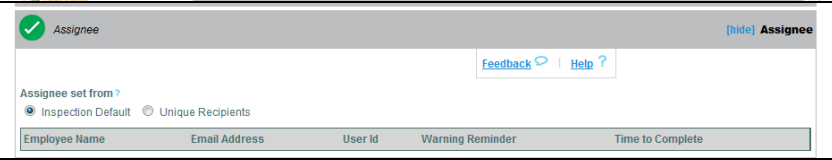
<p>67.</p>	<p>The list now shows all the Requirements. Let's look at the color bars before we Publish this Inspection List.</p> <p>Select the first color bar, Response.</p>	
<p>68.</p>	<p>This view shows us the information on the Requirement selected – CHM.10500.</p> <p>It also allows you to include compliance notes, load or link to documents, and search for matching requirements. Let's look at this one-by-one.</p> <p>Select the Update Notes link.</p>	

<p>69.</p>	<p>Once this Inspection List has been Published, the employee may want to add notes to verify compliance.</p> <p>The employee types in the desired notes and selects Save.</p>	
<p>70.</p>	<p>Relevant Documents: This table allows you to upload/attach documents that are related to the requirement.</p> <p>This should be done before the List is Published, so the employee has the information he or she would need.</p> <p>Select New for the Relevant Documents.</p>	

<p>71.</p>	<p>There are 3 ways you can attach a file: attach it, provide the link to file, or show the website where the information is stored.</p>	
<p>72.</p>	<p>For this example, we are <u>attaching</u> a file.</p> <p>Enter the name or ID of the document.</p> <p>Write a brief description – this is especially helpful when there are many requirements and documents.</p> <p>Select Attach a file.</p> <p>Click on Browse and select the file you want to attach.</p> <p>Select Save Changes.</p>	

<p>73. You may Remove this file by selecting Remove. You may Edit this file, by selecting Edit.</p> <p>Select New.</p>	 <p>Relevant Documents ?</p> <table border="1"> <thead> <tr> <th>Document Id</th> <th>Directory</th> <th>Description</th> <th></th> <th>New</th> </tr> </thead> <tbody> <tr> <td>Gen Lab Guidelines.</td> <td>_Gen Lab Guidelines.doc</td> <td>guidelines for Gen Lab</td> <td>Edit</td> <td>Remove</td> </tr> </tbody> </table>	Document Id	Directory	Description		New	Gen Lab Guidelines.	_Gen Lab Guidelines.doc	guidelines for Gen Lab	Edit	Remove
Document Id	Directory	Description		New							
Gen Lab Guidelines.	_Gen Lab Guidelines.doc	guidelines for Gen Lab	Edit	Remove							
<p>74. We will now add a file <u>via a link</u> instead of an attachment. Type in the name or ID of the document. Add a description of the document. Select Attach a file. Select Link to my file instead of uploading. Select Browse and select the file.</p>	 <p>Attach File or Link</p> <p>Document Id* ?</p> <input type="text"/> <p>Description ?</p> <div style="border: 1px solid gray; height: 100px; width: 100%;"></div> <p>Choose a file or website to attach ?</p> <p><input checked="" type="radio"/> Attach a file <input type="radio"/> Attach a website</p> <input type="text"/> <input type="button" value="Browse_"/> <p><input type="checkbox"/> Link to my file instead of uploading</p> <p><input type="button" value="Save Changes"/></p>										

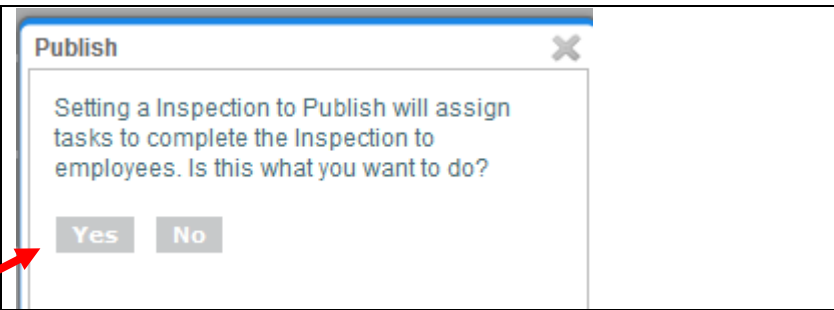
75.	Select Save Changes.	
76.	You may remove the document by selecting Remove. You may edit the document by selecting Edit. You load another document, select New.	
77.	Continue using the same process to add/remove/edit documents.	
78.	The Work Status table displays a list of employees that are assigned work for this requirement. We will review this after the List has been Published.	

79.	<p>Matching Requirements: Some requirements can be similar between inspection lists. This table allows you to track the matches and view the notes on the matching requirements by clicking on the Id. This feature would be used by the employee while completing his or her task.</p>	 <p>A screenshot of the 'Matching Requirements' table in the InspectionReady interface. The table has columns for 'Department', 'Id', and 'Title'. A 'Search' button is located in the top right corner.</p>
80.	<p>Select the Response History color bar.</p>	 <p>A screenshot of the InspectionReady interface showing a list of requirements. A red arrow points to the 'Response History' bar, which is highlighted in green. The bar contains a checklist of items: Incomplete, Response History, Assignee, Schedule, and Messages.</p>
81.	<p>The Response History color bar shows you employee interaction with the selected checklist. Listed on the color bar itself is the ID of the last employee to respond to a requirement and that date that employee replied. Opening the color bar shows you what that employee did with the requirement. We will look at this again after we Publish the Inspection List.</p>	 <p>A screenshot of the expanded 'Response History' bar. It shows a green checkmark icon, the text 'Response History', and a '[hide] Response History' link. Below this, there is a 'Feedback' and 'Help' section, and a log entry: 'bdodd@Aug 23 2012 3:07:11-960PM'.</p>
82.	<p>Select the Assignee color bar to expand.</p>	 <p>A screenshot of the InspectionReady interface showing a list of requirements. A red arrow points to the 'Assignee' bar, which is highlighted in green. The bar contains a checklist of items: Incomplete, Response History, Assignee, Schedule, and Messages.</p>
83.	<p>If you would like to assign someone different to this or any other requirement, this is where to do it.</p>	 <p>A screenshot of the expanded 'Assignee' bar. It shows a green checkmark icon, the text 'Assignee', and a '[hide] Assignee' link. Below this, there is a 'Feedback' and 'Help' section, and a section for 'Assignee set from?' with radio buttons for 'Inspection Default' (selected) and 'Unique Recipients'. At the bottom, there is a table with columns: Employee Name, Email Address, User Id, Warning Reminder, and Time to Complete.</p>

<p>84. To assign someone else to a specific Requirement, select that Requirement.</p> <p>Select Unique Recipients.</p> <p>Select Save.</p>		
<p>85. From the Team drop down menu, Select the Bioanalytics Admin.</p> <p>Select Save.</p>		
<p>86. Now for Requirement, CHM.10500, Terri Sullivan will be given the task to complete this requirement. You may do this for as many requirements as you like.</p>		

<p>87.</p>	<p>Select the Schedule color bar to expand.</p>	
<p>88.</p>	<p>This is the default schedule for the Bioanalytics Inspection List. Remember, this was set up in the License Site Tab, Primary Schedule color bar. (See IR Quick Reference License Site – Primary Schedule for details.) If you would like to adjust the schedule for a specific Requirement, this is where you would do it. Select the Requirement in the tree on the left (Step 87), then Select Change link.</p>	
<p>89.</p>	<p>Select the Message color bar to expand.</p>	
<p>90.</p>	<p>These message settings are the default settings for the Bioanalytics Inspection List. If you would like to adjust the settings for a specific Requirement, this is where you would do it. Select the Requirement in the tree on the left (Step 87) , then refer to Step 51 for specific instructions.</p>	

91.	Select Back to List.																																																																												
92.	Select Edit for the Bioanalytics Inspection List.	<table border="1"> <thead> <tr> <th>List Id</th> <th>List Name</th> <th>Type</th> <th>Department</th> <th>View</th> </tr> </thead> <tbody> <tr> <td>All Common.CL</td> <td>All Common.CL</td> <td>Inspection</td> <td></td> <td>View Requirements Edit</td> </tr> <tr> <td>Bioanalytics</td> <td>Bioanalytics</td> <td>Inspection</td> <td>Medical Center</td> <td>View Requirements Edit</td> </tr> <tr> <td>Core Lab Checklist</td> <td>Core Lab Checklist</td> <td>Inspection</td> <td></td> <td>View Requirements Edit</td> </tr> <tr> <td>Cytopath.CL</td> <td>Cytopath.CL</td> <td>Inspection</td> <td></td> <td>View Requirements Edit</td> </tr> <tr> <td>Gen Lab.CL</td> <td>Gen Lab.CL</td> <td>Inspection</td> <td></td> <td>View Requirements Edit</td> </tr> <tr> <td>Hem and Coag.CL</td> <td>Hem and Coag.CL</td> <td>Inspection</td> <td></td> <td>View Requirements Edit</td> </tr> <tr> <td>HR Corrective Action Policy</td> <td>HR Corrective Action Policy</td> <td>Policy</td> <td>General Lab</td> <td>View Version History Edit</td> </tr> <tr> <td>HR Policy</td> <td>HR Policy</td> <td>Policy</td> <td></td> <td>View Version History Edit</td> </tr> <tr> <td>Immunology.CL</td> <td>Immunology.CL</td> <td>Inspection</td> <td></td> <td>View Requirements Edit</td> </tr> <tr> <td>Microbiology.CL</td> <td>Microbiology.CL</td> <td>Inspection</td> <td></td> <td>View Requirements Edit</td> </tr> <tr> <td>Records: Requisition</td> <td>Records: Requisition</td> <td>Checklist</td> <td>Medical Center</td> <td>View Task Status Edit</td> </tr> <tr> <td>Sample Submission Policy</td> <td>Sample Submission Policy</td> <td>Policy</td> <td>Medical Center</td> <td>View Version History Edit</td> </tr> <tr> <td>Team Leader.CL</td> <td>Team Leader.CL</td> <td>Inspection</td> <td></td> <td>View Requirements Edit</td> </tr> <tr> <td>Urinalysis.CL</td> <td>Urinalysis.CL</td> <td>Inspection</td> <td></td> <td>View Requirements Edit</td> </tr> </tbody> </table>	List Id	List Name	Type	Department	View	All Common.CL	All Common.CL	Inspection		View Requirements Edit	Bioanalytics	Bioanalytics	Inspection	Medical Center	View Requirements Edit	Core Lab Checklist	Core Lab Checklist	Inspection		View Requirements Edit	Cytopath.CL	Cytopath.CL	Inspection		View Requirements Edit	Gen Lab.CL	Gen Lab.CL	Inspection		View Requirements Edit	Hem and Coag.CL	Hem and Coag.CL	Inspection		View Requirements Edit	HR Corrective Action Policy	HR Corrective Action Policy	Policy	General Lab	View Version History Edit	HR Policy	HR Policy	Policy		View Version History Edit	Immunology.CL	Immunology.CL	Inspection		View Requirements Edit	Microbiology.CL	Microbiology.CL	Inspection		View Requirements Edit	Records: Requisition	Records: Requisition	Checklist	Medical Center	View Task Status Edit	Sample Submission Policy	Sample Submission Policy	Policy	Medical Center	View Version History Edit	Team Leader.CL	Team Leader.CL	Inspection		View Requirements Edit	Urinalysis.CL	Urinalysis.CL	Inspection		View Requirements Edit
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94.	Select Yes.	
95.	<p>The Inspection List has now been Published, as seen to the right – Current Status: Publish.</p> <p>The employees will now receive their tasks by email and on their calendars.</p>	