Contents

Overview

Customer and Technical Support

Training

Remote User Log-in

Landing Page

Select a Procedure
  Direct Selection of a Procedure
  Searching
  Browsing Procedures

Working with Procedures
  Reading a Procedure
  Skills Checklists
  Quick Lists
  Images
  Videos
  Assignments
    My Account
    Taking a Test
    Test Results
    Skills Checklist Evaluation
    Skills Checklist Evaluation Results

Administration Tools
  Maintain Users and Groups without User Locations
    Adding Users
    Importing Users
    Exporting Users
    Adding Groups
    Editing User or Group Information
    Deleting a User or Group
  Maintain Users and Groups with User Locations
    Adding User Locations
    Deleting User Locations
    Adding Users
    Importing Users
    Exporting Users
    Adding Groups
    Editing User or Group Information
    Deleting a User or Group
  Disciplines/Categories
    Creating Custom Disciplines
    Editing a Discipline
    Deleting a Discipline
    Reinstating a Standard Discipline
    Creating Custom Categories or Subcategories
    Editing a Category or Subcategory Name
    Deleting a Category or Subcategory
    Reinstating a Standard Category or Subcategory
    Edit Category Mappings
    Reinstate Category Mappings
    Defining Favorite Procedures
  Content Management
    Maintain Procedures
      Creating Custom Procedures
      Edit a Procedure
      Insert or Edit Images
      Insert or Edit Videos
      Insert or Edit Links
      Copy a Procedure
      Delete a Procedure
      Hide a Procedure
      Reinstall Content
      Maintain Skills Checklists
Overview

Lippincott Procedures provides detailed descriptions of procedures in a program that allows users to identify the procedure they need quickly and easily. Users can scroll through an alphabetical list, browse by discipline, category, or subcategory, or perform a search to identify a particular procedure. Each entry provides complete instructions, including the equipment needed, preparation guidelines, implementation steps, special considerations, patient teaching information, documentation, and references. Video clips are included to clarify complex procedures. Each procedure is linked with at least one quick list. Quick lists provide a quick, less-detailed version of a procedure when only an overview is needed. Managers can use the program as an integrated system for assessing and tracking staff competency. Each procedure is linked with at least one skills checklist and a procedure test that allows managers to assess staff performance.

Lippincott Procedures can be used as a reference source for staff and students and as a training management system to track skill competencies.

Customer and Technical Support

Customer and Technical Support are available by contacting Wolters Kluwer Customer Support at 1-844-303-4860 (international 301-223-2454). Customer Support representatives are available Monday through Thursday, 8 AM to Midnight EST; Friday, 8 AM to 7 PM EST; and Sunday, 4 PM to Midnight EST. Emergency after-hours Technical Support is available by calling 1-877-247-6843. You can email us anytime at LNS-Support@wolterskluwer.com. When contacting Customer and Technical Support for assistance, please provide the information from the following site to them: http://procedures.lww.com/lnp/technical.do.
Training

Live Training: WebEx Live Training is offered for administrators and non-administrators.

Training Currently Available:
(By clicking on the link below, you will be redirected to a registration form on our WebEx site.)
Lippincott Procedures - Administrative Training

Lippincott Procedures On Demand Training:
End-user staff training is available 24 hours a day, 7 days a week by simply clicking on the following links:
General User Training
Administrative Level Training
Level 1 Users
Level 1.5 Users
Level 2 Users
Administrators

Remote User Log-in

You can permit users to access Lippincott Procedures from outside your facility. This would be any non-IP-authenticated location, such as from a remote computer, a tablet, or a smartphone. An administrator can assign a username and password to employees to grant them access outside the facility. Remote access to Administration Tools is available if permission is granted to the administrative user in the user profile.

Administrators may also turn on the option for general user self-enrollment in order for authenticated users to create a profile for remote access.

Landing Page

Your session starts on the Lippincott Procedures Landing Page.

From here you can select a discipline to view the selected discipline's procedures, enter a general search for a procedure, directly select a procedure from the search field, or view the Announcements from your institution and from Lippincott.

Select a Procedure

When you select a discipline on the Landing Page, the Procedures Selection Page displays.
From here you can enter a general search for a procedure, browse and select a procedure, or directly select a procedure from the search field.

Direct Selection of a Procedure

To rapidly find the procedure that you need, you can immediately select the procedure name from the Search field. To directly select a procedure, follow these steps.

1. Begin typing the title of the procedure in the search field.
2. Lippincott Procedures displays a drop-down list of all the procedures that have the letters entered in their title.
3. If a discipline is defined in the search filter box, the results will be filtered to only that discipline.
4. Select the required procedure.
5. Lippincott Procedures immediately displays the procedure selected.

Searching

To search for a procedure, skills checklist, or quick list follow these steps.

1. Type a keyword or phrase into the search box.

2. Select a specific discipline or all disciplines (All Content).

3. Click the Search icon.

Lippincott Procedures returns a list of results (that contain your keyword or phrase in the title or full text). Search results are listed by: procedures, skills checklists, quick lists, images, and videos. To see results in one of these categories, click the appropriate link in the left margin.

Lippincott Procedures uses a flexible search engine that includes specific keywords and commands that allow for broad and very narrow search queries. Below is a description of the types of searches that you can perform.

General Search

If a query is entered without any of the specified keywords in the sections below, each word within the query is searched. The results are sorted by entities that contain the most or any of these words.

Example:
- cancer patient care — will search for documents that include cancer, patient, and care

**Wildcard Search**
To search for parts of words, add an asterisk (*) before the first character, after the last character, or at both ends.

**Examples:**
- trach* — will search for words that start with trach
- *vascular — will search for words that end with vascular
- *momano* — will search for words that start with, end with, or contain momano

**Exact Phrase**
To search for an exact phrase, surround the query with quotes.

**Example:**
- “blood pressure” — will search for this phrase only.

**Boolean Search**
To limit or expand a search, you can combine words and phrases using “and,” “or,” “not,” or “w/.”

**Examples:**
- *urine collection* and child — will search for documents that include the phrase urine collection and the word child
- “urine collection” or child — will search for documents that include the phrase urine collection or the word child
- catheter and not child — will search for documents that contain the word catheter but do not contain the word child
- urine w/5 collection — will search for documents that contain the word collection within 5 words of the word urine

**Other Search Features**
**Stemming** — If you search for the word test, the results will include documents that contain the word test and any word that stems from test, such as tests, testing, or tested.

**Fuzzy searching** — When you query a word or phrase in this search engine, it is processed by a spell checker. If there are any flags in that phrase, the search engine suggests in the results page that you may have meant to search for the “spell-checked” phrase instead. For example, if you query the word cancre, the results page will have a note at the top with the question: Did you mean: cancer? If preferred, you can click on this suggestion to perform a new search on the corrected phrase.

**Thesaurus** — The search engine uses a subset of Stedman's Medical Dictionary as a base for its programmable thesaurus. This allows you to query medical terms and their synonyms and return meaningful results. For example, if you search for the word illness, the engine will search for illness and disease.

**Hit Highlighting** — After you submit a search, a results page appears. Within this results page, any occurrence of the searched phrase (and phrases that may have been related as synonyms) are highlighted for easy browsing. If you navigate to a procedure, you will find that each of the tabs related to that procedure also highlights the searched phrases. This allows you to search for a specific term, get quick results, and research this term within the content provided.

You also can find procedures by browsing the disciplines and categories in Lippincott Procedures.

**All Procedures and Advisor Search**
If you are a subscriber to both Lippincott Procedures and Lippincott Advisor. You also have the option to search across all Procedures and Advisor content. To do this, follow these steps.

1. Type a keyword or phrase into the search box.
2. The default search option is “All Procedures and Advisor Content” in the search drop-down selection list.
3. Click the Search icon.
4. The search results screen will first display the results for Lippincott Procedures and then, if desired you may select the Advisor tab to view the Lippincott Advisor results.
Browsing Procedures

To browse for a procedure, follow these steps.

1. Make a Discipline selection on the Landing Page. Lippincott Procedures displays a list of the categories and procedures that relate to the discipline you select.
2. Make a Category selection. Lippincott Procedures displays a list of the subcategories and procedures that relate to the category you select.
3. Make a selection from the subcategory list. Lippincott Procedures displays only those procedures that relate to the subcategory you select.
4. Select a procedure from the procedure selection list.

Lippincott Procedures displays the procedure selected.

You can also filter the procedure list by the first letter of the procedure title. To do this, simply select a letter in the blue bar above the procedure list. If no procedures begin with a given letter, that letter is grayed out.

Working with Procedures

Once you have selected a procedure, Lippincott Procedures gives you several options to proceed.

You can choose one of several tasks related to the procedure.

- Read the full procedure.
- Select and view skills checklists.
- Select and view the quick lists.
- Select and view the images.
- Select and view the videos.

Reading a Procedure

By default, the full procedure displays when the procedure is first selected.
Blood pressure assessment

Objective: To measure a patient’s blood pressure according to the standard of care.

- Gather and prepare the appropriate equipment.
- Perform hand hygiene.
- Confirm the patient’s identity using at least two patient identifiers.
- Ensure that the patient has rested for at least 5 minutes and hasn’t smoked or had caffeine for at least 30 minutes.
- Provide privacy.
- Explain the procedure.
- Position the patient either supine or sitting erect.
- Make sure that the patient is relaxed and comfortable.
- Remain quiet during blood pressure measurement and instruct the patient to do the same.
- Wrap the deflated cuff snugly around the patient’s upper arm; if necessary, use the forearm, calf, or thigh.

A procedure may have more than one skills checklist associated with it. Skills checklists contain steps of the procedure in the order in which they should be performed.

Output Options

While viewing a skills checklist, you can print a hard copy. To do so, click the printer icon. Lippincott Procedures displays a form with additional information.

1. You can print a skills checklist with a date or can leave the date blank. The default option is to print without the date. If you want to print with a date, select the date by clicking the calendar icon.
2. Select an Examinee from the Select an Examinee drop-down list.
3. Select an Evaluator from the Select an Evaluator drop-down list.
4. Click the Print button.

When you click the email envelope icon while viewing a skills checklist, Lippincott Procedures emails the recipient a link to the skills checklist. Email recipients must have network access to Lippincott Procedures and be IP authenticated in order to view the skills checklist.

Quick Lists

When you need to review the steps of a procedure quickly, a quick list provides a helpful overview. To view a procedure's quick list, click the Quick Lists tab.

Output Options

To print a quick list, click the printer icon.

To email a quick list, click the email envelope icon. Lippincott Procedures emails the recipient a link to the quick list. Email recipients must have network access to Lippincott Procedures and be IP authenticated in order to view the quick list.

Images

To view art and photographs that illustrate procedure skills, click the Images tab. Lippincott Procedures displays image captions and thumbnails in the left column.
Click the caption of the image you want to see, and Lippincott Procedures displays the full-sized image and its caption in the right window.

Output Options

To print the image and its caption, click the printer icon.

To email the link to the images screen, click the email envelope icon. Lippincott Procedures emails the recipient a link to the images screen. Email recipients must have network access to Lippincott Procedures and be IP authenticated in order to view the image screen.

Videos

To view a procedure's video resources, click the Videos tab.

Select the video you want to play by clicking on its name in the left column. Lippincott Procedures displays your choice in the right window. Click the Play Now button. Lippincott Procedures launches the video in a separate window.

Closed captioning (English) is available once the video opens. Select the appropriate button on the lower right (differs by browser).

Output Option
Assignments

You can have a procedure's test or skills checklist evaluation assigned to you to assess your knowledge of the procedure. To take a test or skills checklist, you must log in to your account with your username and password. Once logged in, Lippincott Procedures displays the tests and skills checklists assigned to you on your My Account screen. If you are selected as a skills checklist Evaluator, the skills checklist evaluations that you must do are also listed on your My Account screen.

To login from any screen, select Login at the top of the screen. Lippincott Procedures displays the login box.

To login, follow these steps.

1. Type a valid username or email address.
2. Type a valid password.
3. Click the Submit button.

Athens Login
Alternatively, you can select OpenAthens and log in with your Athens authentication. See Athens Authentication later in this Help file.

Other Institution
When your company adopts the SSO authentication, users can access Lippincott Solutions products via the Other Institution login screen instead of the standard login screen. See Other Institution later in this Help file.

Lippincott Procedures Self-enrollment
If you do not have a user account, your facility may choose to provide a self-enrollment option for General users. If your facility has selected self-enrollment, the login screen will have a Self Enroll button to the right of the Submit button.

If you select the Self Enroll option, you must complete the following self-enrollment screen to be enrolled as a General User.
If you have forgotten your username or password, click the **Forgot Username or Password?** link on the login screen. The following screen displays:

**Password Help**

Please enter the email associated with your account. An email will be sent to that address. The email will have your username and instructions for resetting your password.

Don't have an email address or an account? Select that checkbox and fill out the alternate form.

**Email**

[ ] I do not have an email address

Enter your email address and click **Submit** to receive your username and instructions for resetting your password. If you do not have an email address for an account, select that checkbox, enter your username, and fill out the following alternate form.
On your **My Account** screen, Lippincott Procedures displays the procedure tests and skills checklist evaluations assigned to you. If you are selected as a skills checklist Evaluator, the skills checklist evaluations that you must do are also listed.

### My Account

Tests and skills checklists assigned to you are listed on your **My Account** screen. If you are selected as a skills checklist Evaluator, the skills checklist evaluations that you must do are also listed on your **My Account** screen. From the **My Account** screen you can:

- Change your login password by clicking the **Edit** link.
- Review the procedure before taking the assigned test or skills checklist by clicking the **View Procedure** link.
- Take the procedure test by clicking the procedure test name or the **Take Test** link.
- Select a skills checklist Evaluator if a Group was selected when your Evaluator was assigned to you. Your skills checklist will be initiated for you by your Evaluator.
- Select the **Completed Assignments** tab to view your score and your results for all completed tests and skills checklists.
Taking a Test

If you click the procedure name of an assigned test or the Take Test link, Lippincott Procedures displays the procedure test.

12- or 24-hour timed urine collection

When you begin the collection period for a voided urine specimen, what should you do after instructing the patient to void?

- Note the time, and save the urine in case a specimen is accidentally discarded.
- Note the time, and discard the urine collected from the voiding.
- Note the time, and put the urine collected from the voiding in a separate container to send to the laboratory.
- Note the time, and add the urine to the collection container.

Equipment required for a 24-hour urine collection includes:

- a 24-hour urine specimen collection container, gloves, and an ice-filled container or refrigerator.
- a 24-hour urine specimen collection container, gauze pads, and a 20-ml syringe.
- a 24-hour urine specimen collection container, normal saline solution, and povidone-iodine swabs.
- a 24-hour urine specimen collection container, an IV catheter, and a 3-ml syringe.

What should you do if the patient has an indwelling urinary catheter in place at the beginning of the urine specimen collection period?

- Change the catheter before beginning the collection period.
- Discard all urine in the collection bag at the start of the collection period.
- Remove the catheter during the collection period.
- Perform catheter care every hour during the collection period.

A 24-hour urine specimen is used to:

- test for pregnancy.
- provide information about the amount of substances found in urine.
- test for blood in urine.
- provide information about the average rate of excretion of hormones, proteins, and electrolytes.

Test Results

Lippincott Procedures displays your test score when you click the Submit Test button at the end of the test. The test score also will be registered on your My Account screen for you and on the Assignment Records screen for your supervisor.

If you pass the test, the View Results link on the test result screen will display the questions, your answers, the correct answers, and the rationales for the correct and incorrect answers. The correct answer for each question displays in bold. If you answered the question correctly, a green check mark precedes your correct answer. If you answered the question incorrectly, a red slash in a circle precedes your incorrect answer.
Fall prevention
(Correct answers are in **bold**.)
Which type of medication can increase the risk of falls?
- Antibiotics
- Hypertensives
- Anti-inflammatory drugs
- **Diuretics**

**Rationale:** Diuretics can cause orthostatic hypotension and urinary incontinence, which increase the risk of falls.

To prevent falls, make sure that:
- the bed has enough room on both sides for the patient to exit.
- the bed wheels are locked.
- the bed is in its highest position.
- the side rails on the bed are padded.

**Rationale:** Make sure that the wheels on the bed are locked at all times.

If you fail the test, the View Results link on the test result screen will display the questions, your answers, and the rationales for the correct answers. If you answered the question correctly, a green check mark precedes your correct answer. If you answered the question incorrectly, a red slash in a circle precedes your incorrect answer.

12-hour or 24-hour timed urine collection

**Equipment required for a 24-hour urine collection includes:**
- a 24-hour urine specimen collection container, gloves, and an ice-filled container or refrigerator.
- a 24-hour urine specimen collection container, gauze pads, and a 20-ml syringe.
- a 24-hour urine specimen collection container, normal saline solution, and povidone-iodine swabs.
- a 24-hour urine specimen collection container, an IV catheter, and a 3-ml syringe.

**Rationale:** Equipment required for a 24-hour urine collection includes a 24-hour urine specimen collection container; gloves; preservative, if necessary; a bedpan, urinal, or bedside commode if the patient doesn’t have an indwelling urinary catheter; a graduated container if measurement is necessary; an ice-filled container if a refrigerator isn’t available; a label; a laboratory request form; a laboratory biohazard transport container; and patient-care reminders.

How should you intervene if a patient discards a voided urine specimen during the collection period?
- **Collect one additional specimen after the intended step time.**
- Continue specimen collection because the previously collected urine is sufficient for testing.
- Explain that the test is invalid and will need to be started over.
- Extend the collection time an additional hour.

At any time you can click the My Account link on the screen to view the status of your assigned and completed tests. You are also able to download a record of your completed test results, if desired.

**Skills Checklist Evaluation**

Your skills checklist evaluation will be initiated by your Evaluator. If a Group has been assigned to you as an Evaluator, select an Evaluator from the Group and click Save on your My Account screen.

Your Evaluator can add comments, score your evaluation, and check each step of the checklist.
Skills Checklist Evaluation Results

Your Evaluator can check off the steps and then saves the record. The checklist evaluation is not complete until the Evaluator selects "Meets criteria" or "Does not meet criteria" and then clicks Save. Once that is done the checklist evaluation cannot be further revised. When the Evaluator saves the completed checklist evaluation, the entry is sent to Completed Assignments on your My Account screen. Once the evaluation is complete, the record on the Assignment Record tab is also updated.

At any time you can click the My Account link on the screen to view the status of your assigned and completed skills checklists. You are also able to download a record of your completed checklists, if desired.

Administration Tools

Lippincott Procedures has an administrative component that can be accessed from any screen by clicking the Login link.

To login from any screen, select Login at the top of the screen. Lippincott Procedures displays the login box.

To login, follow these steps.

1. Type a valid username or email address.
2. Type a valid password.
3. Click the Submit button.

**Athens Login**

Alternatively, you can select OpenAthens and login with your Athens authentication. See Athens Authentication later in this Help file.

**Other Institution**

When your company adopts the SSO authentication, users can access Lippincott Solutions products via the Other Institution login screen instead of the standard login screen. See Other Institution later in this Help file.
If you have forgotten your username or password, click the Forgot Username or Password? link. The following screen displays:

Lippincott Procedures

Password Help

Please enter the email associated with your account. An email will be sent to that address. The email will have your username and instructions for resetting your password.

Don't have an email address or an account? Select that checkbox and fill out the alternate form.

Email

☐ I do not have an email address

Submit  Cancel

Enter your email address and click Submit Request to receive your username and instructions for resetting your password. If you do not have an email address for an account, select that checkbox, enter your username, and fill out the following alternate form.

Lippincott Procedures

Your password has expired. Please enter a new password below following these guidelines:

Password must be at least 8 characters in length. It must contain at least one each of the following characters:
• upper case alphabetic
• lower case alphabetic
• numeric
• special character

Email Address:

☐ I do not have an email address

Security Question #1:  - Select Security Question -

Security Question #2:  - Select Security Question -

Existing Password:  

New Password:  

Repeat:  

Save  Logout

With Lippincott Procedures Administration Tools, you can view, update, and maintain:

• user information
• user location information (Note: You must contact Wolters Kluwer Customer Support to have User Locations enabled.)
• custom disciplines and categories
• custom procedures, skills checklists, quick lists, tests, notes, and comments
• procedure information including facility review information, procedure assignment to facilities, and search keywords
• assignments
• assignment records
• facility information
• update information
• community information

Maintain Users and Groups without User Locations

To perform user maintenance tasks, click the Users tab. This feature lets you:
Adding Users

To add a user, follow these steps from the Users tab.

1. Click the New User button.
2. Type information into the text boxes, including User Type from the drop-down menu (see Table A).
   - Username must be a minimum of five (5) characters. The username must be unique across all users of the Lippincott Solutions suite of products. As a result, we typically recommend using an email address if available.
   - Password must be a minimum of eight (8) characters and must contain at least one (1) each of the following characters:
     - upper case alphabetic
     - lower case alphabetic
     - numeric
     - special character
3. Click the Save button.

### Table A

<table>
<thead>
<tr>
<th>User Type</th>
<th>Access</th>
</tr>
</thead>
<tbody>
<tr>
<td>General</td>
<td>All general options. No access to Administration Tools.</td>
</tr>
<tr>
<td>Level 1</td>
<td>All general options. Access to Users, Assignments, Assignment Records, Facility (Facility Analytics only), and Community.</td>
</tr>
<tr>
<td>Level 1.5</td>
<td>All general options. Access to Users, Content Management (Comments and Notes Administration only), Assignments, Assignment Records, Facility (Facility Analytics only), and Community.</td>
</tr>
<tr>
<td>Level 2</td>
<td>All general options. Access to Users (Two permission options - &quot;All Permissions&quot; and &quot;Save Drafts Only&quot;). Disciplines/Categories, Content Management, Assignments, Assignment Records, Facility (Facility Analytics only), Updates, and Community.</td>
</tr>
<tr>
<td>Administrator</td>
<td>All general options. Access to Users, Disciplines/Categories, Content Management, Assignments, Assignment Records, Facility, Updates, and Community.</td>
</tr>
</tbody>
</table>

Self enrolled users are displayed in an italic font in the Users and Groups list. Self enrolled users must log-in from within an authenticated site every 90 days to avoid access disruption. Administrators can change self-enrolled General users to standard General users by selecting the username in the list and clicking Validate User. A filter is available to view just these users.
Importing Users

From the Users tab, you can import a list of users for Test and Skills Checklist Evaluation assignments. To do so, start by clicking the Import Users button. Lippincott Procedures refreshes the tab to display import options.

Import only New Users

Administrators and Level 2 users can use this option for importing additional users into Lippincott Procedures by supplying only those additional users in a CSV file.

Import a complete list of Users

Administrators can use this option to import a complete list of users for this facility.

- Usernames in the import file, but not currently on the Users tab, will be added as new users.
- Usernames that are currently on the Users tab, but not in the import file, will be deleted.
- Usernames that are currently on the Users tab, and are also in the import file, will have some, if not all of their attributes updated. These updated user attributes are based on the import file's header specification.

CSV file format

NOTE: It is important that you format the files according to the following instructions. If you do not, the program will not be able to import the file. If the file is formatted incorrectly, the program displays an error message informing you of the problem.
Lippincott Procedures expects each Examinee and Evaluator record within the CSV file to be formatted as shown below.

1. A heading row is required. The first cell in the first row of the CSV file must contain a "#" sign preceding the text header. The "#" sign will designate that the row is a heading row. The heading row will define the column contents and the disposition of the cell contents in that column.

Ordering of column headings can be random. However, it is important that the first column heading begins with a "#"

The headings (case insensitive) are (* denotes required fields):

- Username*
- Password*
- First Name* 
- Middle Initial
- Last Name*
- User Type*
- Employee ID
- Department*
- Job Title
- Email Address
- Group Names (multiple groups must be separated by a pipe character (|))
- Athens Username (for Athens-enabled users)
- User Locations* (required for User Locations enabled facilities; multiple User Locations must be comma delimited)

Click the Download button on the Import screen to download a CSV template file for your facility. The file will have a sample header for your CSV import file.

Example:

<table>
<thead>
<tr>
<th>#Username</th>
<th>Password</th>
<th>First Name</th>
<th>Middle Initial</th>
<th>Last Name</th>
<th>User Type</th>
<th>Employee ID</th>
<th>Department</th>
<th>Job Title</th>
<th>Email Address</th>
<th>Group Names</th>
<th>Athens Username</th>
<th>User Locations</th>
</tr>
</thead>
</table>

2. You can denote a field as relevant for the addition of new users only. The field will be ignored for all existing users. To denote a field as relevant for new users only, the parenthetical suffix (New Only) must be added to that column's heading. Please note: The Username column may not be designated as new only.

Example:

<table>
<thead>
<tr>
<th>#Username</th>
<th>Password (New Only)</th>
<th>First Name</th>
<th>Middle Initial</th>
<th>Last Name</th>
<th>User Type</th>
<th>Employee ID</th>
<th>Department</th>
<th>Job Title</th>
<th>Email Address</th>
<th>Group Names</th>
<th>Athens Username</th>
<th>User Locations</th>
</tr>
</thead>
</table>

3. The "User Type" must be General, Level 1, Level 1.5, Level 2, or Administrator. The "Username" must be a minimum of five (5) characters. The "Password" must be a minimum of eight (8) characters and must contain at least one (1) each of the following characters:

- upper case alphabetic
- lower case alphabetic
- numeric
- special character

4. Examples of CSV records:

a. The Administrator does not want to alter the Password for existing users. The Password is added for new users only (Note: User Locations are enabled for this facility):

Example:

<table>
<thead>
<tr>
<th>#Username</th>
<th>Password</th>
<th>First Name</th>
<th>Middle Initial</th>
<th>Last Name</th>
<th>User Type</th>
<th>Employee ID</th>
<th>Department</th>
<th>Job Title</th>
<th>Email Address</th>
<th>Group Names</th>
<th>Athens Username</th>
<th>User Locations</th>
</tr>
</thead>
</table>

b. The Administrator does not want to alter the User Type for existing users. The User Type is added for new users only:

Example:

<table>
<thead>
<tr>
<th>#Username</th>
<th>Password</th>
<th>First Name</th>
<th>Middle Initial</th>
<th>Last Name</th>
<th>User Type (New Only)</th>
<th>Employee ID</th>
<th>Department</th>
<th>Job Title</th>
<th>Email Address</th>
<th>Group Names</th>
<th>Athens Username</th>
<th>User Locations</th>
</tr>
</thead>
</table>

c. The Administrator in an "Athens-enabled" facility does not want to alter the Athens Username field for existing users. The Athens Username Field is added for new users only:

Example:

<table>
<thead>
<tr>
<th>#Username</th>
<th>Password</th>
<th>First Name</th>
<th>Middle Initial</th>
<th>Last Name</th>
<th>User Type</th>
<th>Employee ID</th>
<th>Department</th>
<th>Job Title</th>
<th>Email Address</th>
<th>Group Names</th>
<th>Athens Username (New Only)</th>
<th>User Locations</th>
</tr>
</thead>
</table>

Please note that you should not enable the General User self-enrollment option if you are managing users centrally and importing a complete list of users regularly. A full user file import deletes any user that is not on the list (which may mean the deletion of recent self-enrolled users accidentally if not on the file).

**Automatic user processing via automated file transfer from your HR System:**

For this method, a formatted full user list can be transmitted electronically from your HR system to the Lippincott Solutions FTP site for processing as often as daily.

To do this, we would need to set your facility up for the processing one time.

- A CSV file needs to be submitted in our standard import format as described above
- This file needs to be a full complete user list. We cannot do "add new only".
- The CSV import needs to be placed in a zip file.
- At any point you can place a new ZIP file containing the user feed CSV file out on the FTP (specific FTP details of which will come once set-up).
- The processor will run once every early morning.
- The processor will determine if you have placed a newer file out there and will automatically process it.
- You can use any filename. Although we'd suggest placing descriptive details such as: "YourFacility-UserFeed-2015-06-30.zip", that way if there are issues we can more easily direct to the problem file.

You will be asked to provide at least one email contact to receive import status reports. These reports will notify you of successful add, edit and delete users as well of any errors. You can then resolve the issue and we'll process that file in the next processor run. As a result, we recommend this feed be only set up with an export from your HR system or similar.

Each load will be processed as follows:

- Usernames that are in the import file, but not currently on the Users tab, will be added as new users.
- Usernames that are currently on the Users tab, but not in the import file, will be deleted.
- Usernames that are currently on the Users tab, and also in the import file, will have some, if not all, of their attributes updated. These updated user attributes are based on the import file's header specification.
- If you do not want certain attributes to be overridden for existing users (like password), you need to specify those columns with the New only option discussed in our import instructions.
- General User self enrollment should not be used with this option as self-enrolled users will be overridden if not on your submitted import file.
Exporting Users

From the Users tab, Administrators can export their facility users in a CSV file. To export the CSV file for your facility click the Export Users button.

When the file is exported, all users' passwords will appear as *****. To update an existing user's password, simply replace the ***** with the new password. If the password is unchanged, simply leave the ***** as is.

Adding Groups

From the Users tab, follow these steps to add a group.

1. Click the New Group button.
2. Enter the Group name.
3. Move users from the Users list box to the Group Members list box using the arrow buttons between the two list boxes.
4. Click the Save button.

Groups may also be added by importing Group Names via the import functionality. If a user belongs to multiple groups, separate each group with a |. For example: ER Admissions|Home Care|The Critical Group|Bariatric|Admin Group

Editing User or Group Information

From the Users tab, you can edit user or group information by following these steps.

1. Select a user or group from the display users and groups list. Lippincott Procedures refreshes the tab with the user's or group's information.
2. Make the changes you want to the user's or group's information.
3. Click the Save button.

Deleting a User or Group

From the Users tab, you can delete a user or group by selecting a name from the display users and groups list and clicking the Delete button.

During an "Import a complete list of Users" import, if all members are removed from a group, it will be deleted.

Maintain Users and Groups with User Locations

Note: You must contact Wolters Kluwer Customer Support to have User Locations enabled.

User Locations provide facility administrators with the ability to separate users into one or more facility or department locations without having separate procedures content sets. Users in all facility or department locations view the same procedures content. Administrators can access all Administration Tools across all locations; they need not be assigned to a specific location to execute Administrator-level functions affecting that specific location.
The purpose of User Locations is so that Level 1, Level 1.5, or Level 2 users defined in a specific user location can only assign procedure tests and skills checklist evaluations for other users that are defined in that specific user location. In the same way, the Level 1, Level 1.5, or Level 2 users can only view assignment records for other users that are defined in that specific user location.

To perform user and user location maintenance tasks, click the Users tab. This feature lets you:

- add, edit, or delete user locations
- add, edit, or delete users or groups
- import users
- export users

Adding User Locations

To add a user location, follow these steps from the Users tab.

1. Select the User Locations subtab.
2. Lippincott Procedures will prompt you to add a user location.
3. To add each location, click the New Location button.
4. If you are a current subscriber to Lippincott Procedures, the Users box will list your facility’s users so that you can add the users to the locations that you define.
5. Add the location name and location members.
6. Click the Save button after adding all appropriate users to the new location.

Deleting User Locations

From the User Locations subtab in the Users tab, you can delete a User Location by selecting a location name from the Locations list and clicking the Delete button. Any users left unassigned to a location due to the deletion should be reassigned to a different location.

Adding Users

To add a user, follow these steps from the Users tab.

1. Select the Users & Groups subtab.
2. Click the New User button.
3. Type information into the text boxes.
   Select User Type (see Table A) and User Location(s) from the drop-down menus.
   Username must be a minimum of five (5) characters.
   Password must be a minimum of eight (8) characters and must contain at least one (1) each of the following characters:
   - upper case alphabetic
   - lower case alphabetic
   - numeric
   - special character
4. Click the Save button.
### Table A

<table>
<thead>
<tr>
<th>User Type</th>
<th>Access</th>
</tr>
</thead>
<tbody>
<tr>
<td>General</td>
<td>All general options. No access to Administration Tools.</td>
</tr>
<tr>
<td>Level 1</td>
<td>All general options. Access to Users, Assignments, Assignment Records, Facility (Facility Analytics only), and Community.</td>
</tr>
<tr>
<td>Level 1.5</td>
<td>All general options. Access to Users, Content Management (Comments and Notes Administration only), Assignments, Assignment Records, Facility (Facility Analytics only), and Community.</td>
</tr>
<tr>
<td>Level 2</td>
<td>All general options. Access to Users (Two permission options - “All Permissions” and “Save Drafts Only”), Disciplines/Categories, Content Management, Assignments, Assignment Records, Facility (Facility Analytics only), Updates, and Community.</td>
</tr>
<tr>
<td>Administrator</td>
<td>All general options. Access to Users, Disciplines/Categories, Content Management, Assignments, Assignment Records, Facility, Updates, and Community.</td>
</tr>
</tbody>
</table>

**Importing Users**

From the Users tab, you can import a list of users for Test and Skills Checklist Evaluation assignments. To do so, start by clicking the Import Users button. Lippincott Procedures refreshes the tab to display import options.

**Import only New Users**

Administrators and Level 2 users can use this option for importing additional users into Lippincott Procedures by supplying only those additional users in a CSV file.

**Import a complete list of Users**

Administrators can use this option to import a complete list of users for this facility.

- Usernames in the import file, but not currently on the Users tab, will be added as new users.
- Usernames that are currently on the Users tab, but not in the import file, will be deleted.
- Usernames that are currently on the Users tab, and are also in the import file, will have some, if not all of their attributes updated. These updated user attributes are based on the import file's header specification.
### CSV File Format

**NOTE:** It is important that you format the files according to the following instructions. If you do not, the program will not be able to import the file. If the file is formatted incorrectly, the program displays an error message informing you of the problem.

Lippincott Procedures expects each Examinee and Evaluator record within the CSV file to be formatted as shown below.

1. A heading row is required. The first cell in the first row of the CSV file must contain a "#" sign preceding the text header. The "#" sign will designate that the row is a heading row. The heading row will define the column contents and the disposition of the cell contents in that column. Ordering of column headings can be random. However, it is important that the first column heading begins with a "#"

The headings (case insensitive) are (* denotes required fields):

- Username*
- Password*
- First Name*
- Middle Initial
- Last Name*
- User Type*
- Employee ID
- Department*
- Job Title
- Email Address
- Group Names (multiple groups must be separated by a pipe character (|).
- Athens Username (for Athens-enabled users)
- User Locations* (required for User Locations enabled facilities; multiple User Locations must be comma delimited)

Click the **Download** button on the Import screen to download a CSV template file for your facility. The file will have a sample header for your CSV import file.

**Example:**

<table>
<thead>
<tr>
<th>#Username</th>
<th>Password (New Only)</th>
<th>First Name</th>
<th>Middle Initial</th>
<th>Last Name</th>
<th>User Type</th>
<th>Employee ID</th>
<th>Department (New Only)</th>
<th>Job Title</th>
<th>Email Address</th>
<th>Group Names</th>
<th>Athens Username</th>
<th>User Locations</th>
</tr>
</thead>
<tbody>
<tr>
<td>js123</td>
<td>new_password1$</td>
<td>Jane</td>
<td>Doe</td>
<td></td>
<td>General</td>
<td>10001</td>
<td>Surgical Staff</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>Location C</td>
</tr>
<tr>
<td>js123</td>
<td>new_password1$</td>
<td>John</td>
<td>Smith</td>
<td>Administrator</td>
<td></td>
<td>30001</td>
<td>Emergency Staff</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>Location C</td>
</tr>
</tbody>
</table>

2. You can denote a field as relevant for the addition of new users only. The field will be ignored for all existing users. To denote a field as relevant for new users only, the parenthetical suffix (New Only) must be added to that column's heading. Please note: The Username column may not be designated as new only.

**Example:**

<table>
<thead>
<tr>
<th>#Username</th>
<th>Password</th>
<th>First Name</th>
<th>Middle Initial</th>
<th>Last Name</th>
<th>User Type</th>
<th>Employee ID</th>
<th>Department</th>
<th>Job Title</th>
<th>Email Address</th>
<th>Group Names</th>
<th>Athens Username</th>
<th>User Locations</th>
</tr>
</thead>
<tbody>
<tr>
<td>js123</td>
<td>new_password1$</td>
<td>John</td>
<td>Smith</td>
<td>Administrator</td>
<td></td>
<td>30001</td>
<td>Surgical Staff</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>Location C</td>
</tr>
<tr>
<td>js123</td>
<td>new_password1$</td>
<td>Jane</td>
<td>Doe</td>
<td>General</td>
<td></td>
<td>10001</td>
<td>Emergency Staff</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>Location C</td>
</tr>
</tbody>
</table>

3. The "User Type" must be General, Level 1, Level 1.5, Level 2, or Administrator. The "Username" must be a minimum of five (5) characters. The "Password" must be a minimum of eight (8) characters and must contain at least one (1) each of the following characters:

- upper case alphabetic
- lower case alphabetic
- numeric
- special character

4. Examples of CSV records:

a. The Administrator does not want to alter the Password for existing users. The Password is added for new users only (Note: User Locations are enabled for this facility):

<table>
<thead>
<tr>
<th>#Username</th>
<th>Password (New Only)</th>
<th>First Name</th>
<th>Middle Initial</th>
<th>Last Name</th>
<th>User Type</th>
<th>Employee ID</th>
<th>Department</th>
<th>Job Title</th>
<th>Email Address</th>
<th>Group Names</th>
<th>Athens Username</th>
<th>User Locations</th>
</tr>
</thead>
<tbody>
<tr>
<td>js123</td>
<td>new_password1$</td>
<td>John</td>
<td>Smith</td>
<td>Administrator</td>
<td></td>
<td>30001</td>
<td>Surgical Staff</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>Location A, Location B</td>
</tr>
</tbody>
</table>

b. The Administrator does not want to alter the User Type for existing users. The User Type is added for new users only:

<table>
<thead>
<tr>
<th>#Username</th>
<th>Password</th>
<th>First Name</th>
<th>Middle Initial</th>
<th>Last Name</th>
<th>User Type (New Only)</th>
<th>Employee ID</th>
<th>Department</th>
<th>Job Title</th>
<th>Email Address</th>
<th>Group Names</th>
<th>Athens Username</th>
<th>User Locations</th>
</tr>
</thead>
<tbody>
<tr>
<td>js123</td>
<td>new_password1$</td>
<td>John</td>
<td>Smith</td>
<td>Administrator</td>
<td></td>
<td>30001</td>
<td>Surgical Staff</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>Location A, Location B</td>
</tr>
<tr>
<td>js123</td>
<td>new_password1$</td>
<td>Jane</td>
<td>Doe</td>
<td>General</td>
<td></td>
<td>10001</td>
<td>Emergency Staff</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>Location C</td>
</tr>
</tbody>
</table>
c. The Administrator in an "Athens-enabled" facility does not want to alter the Athens Username field for existing users. The Athens Username field is added for new users only:

```plaintext
<table>
<thead>
<tr>
<th>#Username</th>
<th>Password</th>
<th>First Name</th>
<th>Middle Initial</th>
<th>Last Name</th>
<th>User Type</th>
<th>Employee ID</th>
<th>Department</th>
<th>Job Title</th>
<th>Email Address</th>
<th>Group Names</th>
<th>Athens Username (New Only)</th>
<th>User Locations</th>
</tr>
</thead>
<tbody>
<tr>
<td>js123</td>
<td>Password1$</td>
<td>John</td>
<td></td>
<td>Smith</td>
<td>Level 2</td>
<td>JS001</td>
<td>Surgical Staff</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>Location A</td>
</tr>
<tr>
<td>jd123</td>
<td>Password1$</td>
<td>Jane</td>
<td>Doe</td>
<td>General</td>
<td>JD001</td>
<td>Emergency Staff</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>Location B</td>
</tr>
</tbody>
</table>
```

Please note that you should not enable the General User self-enrollment option if you are managing users centrally and importing a complete list of users regularly. A full user file import deletes any user that is not on the list (which may mean the deletion of recent self-enrolled users accidentally if not on the file).

**Automatic user processing via automated file transfer from your HR System:**

For this method, a formatted full user list can be transmitted electronically from your HR system to the Lippincott Solutions FTP site for processing as often as daily.

To do this, we would need to set your facility up for the processing one time:

- A CSV file needs to be submitted in our standard import format as described above
- This file needs to be a full complete user list. We cannot do "add new only".
- The CSV import needs to be placed in a zip file.
- At any point you can place a new ZIP file containing the user feed CSV file on the FTP (specific FTP details of which will come once set-up).
- The processor will run once every early morning.
- The processor will determine if you have placed a newer file out there and will automatically process it.
- You can use any filename. Although we'd suggest placing descriptive details such as: "YourFacility-UserFeed-2015-06-30.zip", that way if there are issues we can more easily direct to the problem file.

If there are issues, we will let them know. You can then resolve the issue and we'll process that file in the next processor run. As a result, we recommend this feed be only set up with an export from their HR system or similar.

Each load will be processed as follows:

- Usernames that are in the import file, but not currently on the Users tab, will be added as new users.
- Usernames that are currently on the Users tab, but not in the import file, will be deleted.
- Usernames that are currently on the Users tab, and are also in the import file, will have some, if not all, of their attributes updated. These updated user attributes are based on the import file's header specification.
- If you do not want certain attributes to be overridden for existing users (like password), you need to specify those columns with the New only option discussed in our import instructions.
- General User self enrollment should not be used with this option as self-enrolled users will be overridden if not on your submitted import file.

**Exporting Users**

From the **Users** tab, Administrators can export their facility users in a CSV file. To export the CSV file for your facility click the **Export Users** button.

When the file is exported, all users' passwords will appear as *****. To update an existing user's password, simply replace the ***** with the new password. If the password is unchanged, simply leave the ***** as is.

**Adding Groups**

From the **Users** tab, follow these steps to add a group:

1. Select the **Users & Groups** subtab.
2. Click the **New Group** button.
3. Enter the Group name.
4. Move users from the **Users** list box to the **Group Members** list box using the arrow buttons between the two list boxes.
5. Click the **Save** button.
Groups may also be added by importing Group Names via the import functionality. If a user belongs to multiple groups, separate each group with a |. For example: ER Admissions|Home Care|The Critical Group|Bariatric|Admin Group

Editing User or Group Information

From the Users tab, you can edit user or group information by following these steps.

1. On the User & Groups subtab, select a user or group from the display users and groups list. Lippincott Procedures refreshes the tab with the user's or group's information.
2. Make the changes you want to the user's or group's information.
3. Click the Save button.

Note: Groups appear in a user location if any users assigned to that location is a group member.

Deleting a User or Group

From the Users tab, you can delete a user or group by selecting a name from the display users and groups list and clicking the Delete button.

During an "Import a complete list of Users" import, if all members are removed from a group, it will be deleted.

Disciplines/Categories

From the Disciplines/Categories tab, users with Administrator or Level 2 privileges can create custom disciplines or categories, edit standard disciplines or categories, change disciplines or categories for standard or custom procedures, and define and save a group of favorite procedures. This feature lets you:

- create custom disciplines or categories and subcategories
- rename existing disciplines or categories and subcategories (custom or standard)
- delete disciplines or categories and subcategories (custom or standard)
- reinstate standard disciplines or categories and subcategories.
- edit or delete discipline and category mappings for procedures (custom or standard)
- reinstate disciplines or category mappings for standard procedures
- define a group of favorite procedures

Creating Custom Disciplines

To create a custom discipline, click the Disciplines/Categories tab and select the Organizer tab. Click the Manage Disciplines button. Lippincott Procedures displays a pop-up box so you can add the new custom discipline. Select the New Custom Discipline button. Add the discipline name, optional Landing Page description, and optional Landing Page image. Then, click Save.

NOTE: Lippincott Procedures precedes the new discipline with a "C" to indicate that it is a custom discipline.

The new discipline name is now available so you can add categories and subcategories under the new name. Once categories and subcategories have been assigned to the new discipline, it will be available on the Mappings tab so you can classify custom or standard procedures under the new name.

Editing a Discipline
From the Disciplines/Categories tab, click the Organizer tab. Click the Manage Disciplines button. Select a discipline name from the list and click the Edit Discipline button. Lippincott Procedures displays a pop-up box with the existing discipline name, optional Landing Page description, and optional Landing Page image. Type the new discipline name, add or revise the optional Landing Page description, and revise the optional Landing Page image. Then, click Save.

The revised discipline is now available on the Mappings tab so you can classify custom or standard procedures under the revised discipline.

Deleting a Discipline

From the Disciplines/Categories tab, click the Organizer tab. Click the Manage Disciplines button. Select a discipline name from the list and click the Delete Discipline button.

NOTES:
- When you delete a standard discipline, Lippincott Procedures removes all the procedures assigned to that discipline. To restore a standard discipline, click here.
- Once deleted, custom disciplines cannot be reinstated.

Reinstating a Standard Discipline

When you delete a standard discipline, Lippincott Procedures removes it from display.

To reinstate a deleted standard discipline, follow these steps.

1. From the Disciplines/Categories tab, click the Organizer tab. Click the Manage Disciplines button. Select the Reinstall Disciplines button. Lippincott Procedures displays a list of hidden standard disciplines.
2. Select the discipline name(s) you want to reinstate.
3. Click the Reinstall Disciplines button.

Lippincott Procedures automatically reinstates all procedures, skills checklists, quick lists, and tests associated with the reinstated standard disciplines.

Creating Custom Categories or Subcategories

To create a custom category, click the Disciplines/Categories tab and select the Organizer tab. Select a standard or custom discipline. Click the New Category button. Lippincott Procedures displays a pop-up box so you can add the new custom category and subcategory. Type the category and subcategory names and click Add Category.

To create a new custom subcategory to an existing category, click the Disciplines/Categories tab and select the Organizer tab. Select an existing category then click the New Subcategory button. Lippincott Procedures displays a pop-up box so you can add the new custom subcategory. Type the subcategory name and click Add Category.

NOTE: Lippincott Procedures precedes the new category or subcategory with a "C" to indicate that it is a custom category or subcategory.

The new category or subcategory name is now available on the Mappings tab so you can classify custom or standard procedures under the new name.

Editing a Category or Subcategory Name

From the Disciplines/Categories tab, click the Organizer tab. Select a category or subcategory name from the list and click the Rename Category button. Lippincott Procedures displays a pop-up box with the existing category name. Type the new category name and click Save Change.

The revised category or subcategory name is now available on the Mappings tab so you can classify custom or standard procedures under the revised name.

Deleting a Category or Subcategory

From the Disciplines/Categories tab, click the Organizer tab. Select a category or subcategory name from the list and click the Delete Category button.

NOTES:
- When you delete a standard category, Lippincott Procedures removes all the procedures assigned to that category. To restore a standard category, click here.
- Once deleted, custom categories cannot be reinstated.

Reinstating a Standard Category or Subcategory

When you delete a standard category or subcategory, Lippincott Procedures removes it from display.

To reinstate a deleted standard category or subcategory, follow these steps.

1. From the Disciplines/Categories tab, click the Organizer subtab. Select the Reinstall Categories button. Lippincott Procedures displays a list of removed standard categories and subcategories.
2. Select the category or subcategory name(s) you want to reinstate.
3. Click the Reinstall Categories button.

Lippincott Procedures automatically reinstates all procedures, skills checklists, quick lists, and tests associated with the reinstated standard categories or subcategories.

Edit Mappings

To change the discipline or category mappings for procedures, click the Disciplines/Categories tab and select the Mappings subtab. Select procedure(s) from the list and click the Edit Mappings button. Lippincott Procedures displays a pop-up box with the disciplines and categories defined for the procedure(s). Add or remove discipline and/or category name(s) and click Save.

NOTE: Lippincott Procedures precedes procedure(s) with modified disciplines, categories, or subcategories with an "M" to indicate that the procedure has modified disciplines, categories, or subcategories.
Reinstate Category Mappings

When you revise a standard procedure's discipline, category, or subcategory mappings, Lippincott Procedures saves the standard disciplines, categories, and subcategories defined for the procedure.

To reinstate category mappings, follow these steps.

1. From the Disciplines/Categories tab, click the Mappings subtab. Select the Reinstate Mappings button. Lippincott Procedures displays a list of procedures with modified disciplines, categories, and subcategories.
2. Select the procedure name(s) you want to reinstate.
3. Click the Reinstate Mappings button.

Lippincott Procedures automatically reinstates the disciplines, categories, and subcategories for all the standard procedures selected.

Defining Favorite Procedures

To create, edit, or delete a group of institutional favorite procedures, click the Disciplines/Categories tab and select the Favorites subtab.

New Favorite

To define a new group of favorite procedures, click the New Favorite button. Lippincott Procedures displays a pop-up box so you can add a favorite group name and select procedures to add to the favorite group. Click Save to save the group of favorite procedures.

NOTE: When a group of favorite procedures is defined Lippincott Procedures adds a Favorites option to the top of every screen so that users can select the group of favorite procedures to select and view.

Edit Favorite

To edit a group of favorite procedures, select a favorite group and click the Edit Favorite button. Lippincott Procedures displays a pop-up box so you can add additional procedures to the favorite group or remove procedures from the favorite group. Click Save to save the revised group of favorite procedures.

Delete Favorite

To delete a group of favorite procedures, select a favorite group and click the Delete Favorite button.

Content Management

The Administrator and Level 2 users can manage content for procedures, checklists, quick lists, procedure tests, notes, comments, and procedure information. Level 1.5 users can manage comments and notes for procedures, checklists, or quick lists. To gain access to these tasks, click the Content Management tab. Now you can:

- create custom procedures, checklists, quick lists, procedure tests, notes, and comments.
- edit or delete existing standard or custom procedures, checklists, quick lists, procedure tests, notes, and comments.
- maintain facility review and approval information
- assign procedures to a specific facility or facilities within your organization
- enter keywords to help your institution's users locate the procedure when performing searches
- reinstate the original text of standard procedures, checklists, quick lists, and procedure tests.

Maintain Procedures

Creating Custom Procedures

On the Content Management tab, click the New Procedure button. Lippincott Procedures refreshes the tab with options.

Follow these steps to create a custom procedure.

1. On the Procedure subtab, type a procedure name.
2. Assign the new procedure to disciplines, categories, and subcategories.
3. Customize the new procedure. See options in Table B. Optionally add skills checklists, quick lists, or a test which can be published at the same time as the procedure if desired.
   - Notes and search keywords cannot be added until the procedure is published.
4. Click the Publish or Save Draft button.
   - Click the Publish button when you complete your custom changes and want the procedure available to all users in your facility.
   - Click the Save Draft button if you have not completed the custom changes for your procedure (as well as the checklist and quick list if created). Draft procedures will not be available to users in your facility.
   - Click the Preview button when you would like to preview the appearance of the procedure or email a PDF version of that procedure for external review.
Table B

<table>
<thead>
<tr>
<th>Option</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Add/Edit/Remove Section Heads</td>
<td>Select section headers you want to use in your procedure. Uncheck any that you want to delete. Create a custom section header by clicking on Create Custom.</td>
</tr>
<tr>
<td>Reorder Section Heads</td>
<td>Change the order in which section headers display.</td>
</tr>
<tr>
<td>Edit Text</td>
<td>Change the order in which section headers display.</td>
</tr>
<tr>
<td>Insert or Edit Images</td>
<td>Add, replace, or delete images for a procedure.</td>
</tr>
<tr>
<td>Insert or Edit Videos</td>
<td>Add, replace, or delete videos for a procedure.</td>
</tr>
<tr>
<td>Insert or Edit Links</td>
<td>Add or edit hypertext links.</td>
</tr>
<tr>
<td>Insert PDF Document</td>
<td>Upload an Adobe PDF document into your custom procedure.</td>
</tr>
<tr>
<td>Editorial Comments</td>
<td>View all users who have updated a procedure; includes date and time that the procedure was updated and any comments that were made.</td>
</tr>
</tbody>
</table>

NOTE: Lippincott Procedures precedes the new procedure with a “C” to indicate that it is a published custom procedure or “D” to indicate that it is a draft procedure. Published custom procedures can be immediately viewed by all users in your facility. Draft procedures are hidden from user view until published.

**Edit a Procedure**

From the Content Management tab, select a procedure from the list and click the Edit Content button.

To edit a procedure, follow these steps.

1. Select the Procedure subtab. On the Procedures subtab, edit the procedure name, if required.
2. Customize the procedure. See options in Table B.
3. Click the Publish, Save Draft, or Revert to Saved button.
   - Click the Publish button when you complete your custom changes and want the procedure available to all users in your facility.
   - Click the Save Draft button if you have not completed the custom changes for your procedure. Draft procedures will not be available to users in your facility.
   - Click the Revert to Saved button if you choose to discard all of your custom changes during your editing session.
   - Click the Preview button when you would like to preview the appearance of the procedure or email a PDF version of that procedure for external review.

Please note that any revisions to disciplines or categories of existing procedures must be made from the Disciplines/Categories tab under the Mappings subtab.

https://procedures.lww.com/fnp/help/fnp_help.jsp
TO INSERT OR EDIT IMAGES

1. To insert or edit images for a procedure, select the Content Management tab.
2. If adding an image to an existing procedure, select the procedure and click on Edit Content; if creating a new procedure, click on New Procedure.
3. Add an image to a procedure
   a. On the Procedure subtab, place your cursor at the position where you want to add the image.
   b. Select the "Insert or Edit Image" option under the Insert option on the Menu.
   c. The Upload Image screen will display.
      - If the procedure being customized is a standard procedure or a customized standard procedure, the Insert Image screen will display the standard images for the procedures plus any custom images previously uploaded by your facility.

- If the procedure being customized is a custom procedure, the Insert Image screen will display the custom images previously uploaded by your facility.
d. If you need to upload custom images, select the **Upload Image** button, browse to the file, and click the **Upload** button. Only JPG or GIF images can be uploaded.

Images remain on the **Upload Image** screen unless you delete them. To delete an image, select the image and click the **Delete Selected Image** button. Then select **Insert Image** and the selected image will be placed in the text of the procedure.

e. When the inserted image is added on the **Procedures** subtab, the same image is added to the procedure’s **Images** subtab. The image caption must be added on the **Images** subtab.

f. Save your work by selecting the **Procedure** subtab. Click the **Publish** button or the **Save Draft** button at the bottom of the screen.

4. **Replace an image**

a. On the **Procedure** subtab, select the image that you want to replace.

b. Select the "Insert or Edit Images" option on the Menu.

c. The **Upload Image** screen will display.

   • If the procedure being customized is a standard procedure or a customized standard procedure, the **Upload Image** screen will display the standard images for the procedures plus any custom images previously uploaded by your facility.

   • If the procedure being customized is a custom procedure, the **Upload Image** screen will display the custom images previously uploaded by your facility.

d. Select **Upload Image** to import a new image. Only JPG or GIF images can be uploaded.

e. For standard procedures, you can select a standard image or a previously uploaded image. For custom procedures, you can select a previously uploaded image. Then select **Insert Image** and the selected image will replace the image in the text of the procedure.

f. When the image is replaced on the **Procedure** subtab, the same image is replaced on the procedure’s **Images** subtab. The image caption must be added on the **Images** subtab.

5. **Delete an image**

a. On the **Procedure** subtab, select the image that you want to delete and press the **Delete** key.

b. When the image is deleted on the **Procedure** subtab, the same image is deleted on the procedure’s **Images** subtab.

c. You can hide an image on the procedure’s **Images** subtab by clearing the checkbox preceding the image on the **Images** subtab.

d. Save your work by selecting the **Procedure** subtab. Click the **Publish** button or the **Save Draft** button at the bottom of the screen.

Resizing an image that was inserted into a procedure

It is recommended that you resize your image with a graphics program before inserting it into a procedure in Lippincott Procedures. Graphics programs offer much more resize control. However, if you want to resize the image within Lippincott Procedures, you can:

   • Click on the image.
   
   • Squares will appear at each corner of the image and on each side.
   
   • Click and drag the squares to resize the image as appropriate.

---

**Insert or Edit Videos**

1. To insert or edit videos for a procedure, select the **Content Management** tab.

2. If adding a video to an existing procedure, select the procedure and click on **Edit Content**; if creating a new procedure, click on **New Procedure**.

3. **Add a video to a procedure**

   a. On the **Procedure** subtab, place your cursor at the position where you want to add the video.

   b. Select the "Insert or Edit Video" option under the Insert option on the Menu.

   c. The **Insert Video** screen will display.

      • If the procedure being customized is a standard procedure or a customized standard procedure, the **Insert Video** screen will display a still image of the standard videos for the procedure plus a still image of all custom videos previously uploaded by your facility.
d. If you need to upload custom videos, select the Upload Video button, browse to the file, and click the Upload button. MP4 and FLV videos can be uploaded. FLV files will be converted to MP4 files. The maximum video size accepted before compression is 15 MB. The maximum post compression video size that you can upload is 10 MB. You will not be able to load a video that has a post compression video size greater than 10 MB. Videos remain on the Insert Video screen unless you delete them. To delete a video, select the video and click Delete Selected Video.

e. For standard procedures or customized standard procedures, you can select a standard video or a previously uploaded video. For custom procedures, you can select a previously uploaded video. Then select Insert Video and a video icon for the selected video will be placed in the text of the procedure. If having difficulty locating a previously uploaded video, you can search for the video by portions of the video caption title.

f. When the inserted video icon is added on the Procedure subtab, a still for the same video is added to the procedure's Videos subtab. The video caption must be added on the Videos subtab.

g. Save your work by selecting the Procedure subtab. Click the Publish button or the Save Draft button at the bottom of the screen.

4. Replace a video

a. On the Procedure subtab, select the video icon that you want to replace.

b. Select the "Insert or Edit Video" option on the Menu.

c. The Insert Video screen will display.

- If the procedure being customized is a standard procedure or a customized standard procedure, the Insert Video screen will display a still image of the standard videos for the procedure plus a still image of all custom videos previously uploaded by your facility.
• If the procedure being customized is a custom procedure, the Insert Video screen will display a still image of all custom videos previously uploaded by your facility.

d. Select Upload Video to import a new image. MP4 and FLV videos can be uploaded.

e. For standard procedures or customized standard procedures, you can select a standard video or a previously uploaded video. For custom procedures, you can select a previously uploaded video. Then select Insert Video and the selected video will replace the video in the text of the procedure.

f. When the video is replaced on the Procedure subtab, the same video is replaced on the procedure's Videos subtab. The video caption must be added on the Videos subtab.

g. Save your work by selecting the Procedure subtab. Click the Publish button or the Save Draft button at the bottom of the screen.

5. Delete a video

a. On the Procedure subtab, select the icon for the video that you want to delete and press the Delete key.

b. When the video icon is deleted on the Procedure subtab, the same video is deleted on the procedure's Videos subtab.

You can hide a video on the procedure's Videos subtab by clearing the checkbox preceding the image on the Videos subtab.

c. Save your work by selecting the Procedure subtab. Click the Publish button or the Save Draft button at the bottom of the screen.

Insert or Edit Links

1. To insert or edit links for a procedure, select the Content Management tab.

2. If adding a link to an existing procedure, select the procedure and click on Edit Content; if creating a new procedure, click on New Procedure.

3. Select the word or phrase within the body of the procedure that you want the link to be associated with.

4. Select the "Insert/edit link" icon.

5. A box will pop up that will allow you to add the URL to the "Url" field. Select the "Target" option and then click Ok.

6. Save your work by selecting the Publish button or the Save Draft button at the bottom of the screen.

Add a link to a procedure

To add a hypertext link in the text of one procedure so that it links to another, follow these steps:

- Select and view the destination procedure.
- Locate the destination procedure's URL by selecting Email Page. Within the body of the email will be the URL for the destination procedure. The destination procedure's URL is also available in the web address field.
  (You are also able to download a full list of procedure, checklist, and quick list URLs by visiting the Facility tab within the administrative section and clicking Download URLs from the Procedures, Checklists, and Quick Lists URLs section.)
- Select the URL and copy it.
- Select the originating procedure.
- Follow the steps above for Insert or Edit Links.
- In the pop up box, paste the copied URL for the destination procedure into the "Url" field.

Copy a Procedure

From the Content Management tab, select a procedure from the list and click the Copy Procedure button.

NOTES:

- Lippincott Procedures automatically copies the skills checklists, quick lists, images, videos, and text associated with the procedure you copy.
- You will be asked to name the procedure. The procedure name may not be the same as any other existing procedure.
- When you copy a procedure, Lippincott Procedures "hides" it from display to general users while keeping it visible for editing for administrative users.
- When ready to display, simply select the procedure and click Show Procedure.

Delete a Procedure

From the Content Management tab, select a procedure from the list and click the Delete Procedure button.

NOTES:

- Lippincott Procedures automatically deletes the skills checklists, quick lists, images, videos, and text associated with the procedure you delete.
- When you delete a standard procedure, Lippincott Procedures removes it from all general and administrative content management and update management views. To restore a standard procedure, see the instructions under Reinstate a Procedure.
- Once deleted, custom procedures cannot be reinstated.

Hide a Procedure

When you hide a procedure, Lippincott Procedures "hides" it from display to general users while keeping it visible for editing for administrative users. From the Content Management tab, select a procedure from the list and click the Hide Procedure button.
### Notes:
- Lippincott Procedures automatically hides the skills checklists, quick lists, images, videos, and test associated with the procedure you hide.
- When you hide a procedure, Lippincott Procedures changes the display of the procedure to italic in the procedure list and the Hide Procedure button changes to a Show Procedure button when the hidden procedure is selected.

### Reinstall Content

When you delete a standard procedure, Lippincott Procedures removes it from all general and administrative content management and update management views.

To reinstall a deleted standard procedure, follow these steps.

1. From the Content Management tab, click the Reinstate Content button. Lippincott Procedures displays a list of removed standard procedures. Checklists, quick lists, and tests can also be reinstated from the Reinstate Content screen.
2. Select the procedure(s) you want to reinstall. You can preview a standard procedure before you reinstall it. Click the standard procedure name to preview it.
3. Click the Reinstate button.

Now the standard procedure displays in the procedure list. Lippincott Procedures automatically reinstates the skills checklists, quick lists, images, videos, and test associated with the reinstated procedure.

### Maintain Skills Checklists

#### Creating Custom Skills Checklists for a New Procedure

To create a custom skills checklist for a new procedure, click the New Procedure button on the Content Management screen. Create the procedure as previously described. Select the Skills Checklists subtab. Lippincott Procedures displays a new skills checklist form.

Follow these steps to create a custom skills checklist.

1. Type a skills checklist name.
2. Type the skills checklist objective.
3. Type skills checklist items. Optionally, item headings can be added. Select the plus sign to add new checklist items.
4. Select the up or down arrows to change the sequence of checklist items.
5. Select the minus sign in the red circle to delete checklist items.
6. Steedman's Medical Dictionary is referenced for the spell checker.
7. Add Editorial Comments if needed.
8. Return to the Procedure subtab. The procedure must be saved in order to save the custom checklist. On the Procedure subtab, click the Publish or Save Draft button.
   - Click the Publish button when you complete your custom changes and want the procedure and checklist available to all users in your facility.
   - Click the Save Draft button if you have not completed the custom changes for your procedure or checklist. Draft procedures and checklists will not be available to users in your facility.
Creating Custom Skills Checklists for an Existing Procedure

To create a new custom skills checklist for an existing procedure, select a procedure on the Content Management screen. Click the Edit Content button. Select the Skills Checklist subtab for the procedure.

If the procedure already has a skills checklist, Lippincott Procedures displays the following screen.

To add a custom skills checklist to a procedure, do the following:

1. Click New Checklist to display the new skills checklist form.
2. Type a skills checklist name.
3. Type skills checklist items. Stedman's Medical Dictionary is referenced for the spell checker.
4. Click the Publish button when you complete your custom changes and want the checklist available to all users in your facility. Click the Save Draft button if you have not completed the custom changes for your checklist. Draft checklists will not be available to general users in your facility.

NOTE: Lippincott Procedures precedes the new skills checklist with a "C" to indicate that it is a published custom skills checklist or "D" to indicate that it is a draft checklist.

Edit a Skills Checklist

To edit a skills checklist for an existing procedure, select a procedure on the Content Management screen. Click the Edit Content button and follow these steps.

1. Select the Skills Checklist subtab for the procedure.
2. Select a skills checklist to edit.
3. Click the Edit Checklist button.
4. Lippincott Procedures opens the skills checklist edit form.
5. Edit the skills checklist name, if required.
6. Edit and format skills checklist details and comments.
7. Click the Publish or Save Draft button.
   - Click the Publish button when you complete your custom changes and want the checklist available to all users in your facility.
   - Click the Save Draft button if you have not completed the custom changes for your checklist. Draft checklists will not be available to general users in your facility.

The View Audit Trail button lets you see all users who have updated a checklist. It contains the date and time that a checklist was updated and comments included by the user.

Delete a Skills Checklist

From the Skills Checklist subtab, select a skills checklist and click the Delete Checklist button.

NOTES:

- When you delete a standard skills checklist for a procedure, Lippincott Procedures removes it from displaying. To see how to restore a standard skills checklist for a procedure, see Reinstate a Skills Checklist.
- Once deleted, custom skills checklists cannot be reinstated.

Reinstate a Skills Checklist

When you delete a standard skills checklist for a procedure, Lippincott Procedures removes it from display.

To reinstate a deleted standard skills checklist for a procedure, follow these steps.

1. From the Skills Checklist subtab, click the Reinstate Checklists button. Lippincott Procedures presents you with a list of the removed standard skills checklists for the procedure.
2. Select the skills checklist(s) you want to reinstate. You can preview a standard checklist before you reinstate it. Click the standard checklist name to preview it.
3. Click the Reinstate button.

Maintain Quick Lists

Creating Custom Quick Lists for a New Procedure

To create a custom quick list for a new procedure, click the New Procedure button on the Content Management screen. Create the procedure as previously described. Select the Quick Lists subtab. Lippincott Procedures displays a new quick list form.

Follow these steps to create a custom quick list.

1. Type a quick list name.
2. Type and format quick list details and comments. Stedman's Medical Dictionary is referenced for the spell checker.
3. Return to the Procedure subtab. The procedure must be saved in order to save the custom quick list. On the Procedure subtab, click the Publish or Save Draft button.
   - Click the Publish button when you complete your custom changes and want the procedure and quick list available to all users in your facility.
   - Click the Save Draft button if you have not completed the custom changes for your procedure or quick list. Draft procedures and quick lists will not be available to users in your facility.
Creating Custom Quick Lists for an Existing Procedure

To create a new custom quick list for an existing procedure, select a procedure on the Content Management screen. Click the Edit Content button. Select the Quick List subtab for the procedure.

If the procedure already has a quick list, Lippincott Procedures displays the following screen.

<table>
<thead>
<tr>
<th>Quick List</th>
<th>Date</th>
</tr>
</thead>
<tbody>
<tr>
<td>S Blood pressure assessment</td>
<td>03/11/2013</td>
</tr>
</tbody>
</table>

To add a custom quick list to a procedure, do the following:

1. Click New Quick List to display the new quick list form.
2. Type a quick list name.
3. Type and format quick list details and comments. Stedman's Medical Dictionary is referenced for the spell checker.
4. Click the Publish button when you complete your custom changes and want the quick list available to all users in your facility. Click the Save Draft button if you have not completed the custom changes for your quick list. Draft quick lists will not be available to general users in your facility.

NOTE: Lippincott Procedures precedes the new quick list with a "C" to indicate that it is a published custom quick list or "D" to indicate that it is a draft quick list.

Edit a Quick List

To edit a quick list for an existing procedure, select a procedure on the Content Management screen. Click the Edit Content button and follow these steps.

1. Select the Quick List subtab for the procedure.
2. Select a quick list to edit.
3. Click the Edit Quick List button.
4. Lippincott Procedures opens the quick list edit form.
5. Edit the quick list name, if required.
6. Edit and format quick list details and comments.
7. Click the Publish or Save Draft button.
   - Click the Publish button when you complete your custom changes and want the quick list available to all users in your facility.
   - Click the Save Draft button if you have not completed the custom changes for your quick list. Draft quick lists will not be available to general users in your facility.

The View Audit Trail button lets you see all users who have updated a quick list. It contains the date and time that a quick list was updated and comments included by the user.

Delete a Quick List

From the Quick List subtab, select a quick list and click the Delete Quick List button.

NOTES:

- When you delete a standard quick list for a procedure, Lippincott Procedures removes it from displaying. To see how to restore a standard quick list for a procedure, see Reinstate a Quick List.
- Once deleted, custom quick lists cannot be reinstated.

Reinstate a Quick List

When you delete a standard quick list for a procedure, Lippincott Procedures removes it from display.

To reinstate a deleted standard quick list for a procedure, follow these steps.

1. From the Quick List subtab, click the Reinstate Quick Lists button. Lippincott Procedures presents you with a list of removed standard quick lists for a procedure.
2. Select the quick list(s) you want to reinstate. You can preview a standard quick list before you reinstate it. Click the standard quick list name to preview it.
3. Click the Reinstate button.

Maintain Tests

Creating a Custom Test for a New Custom Procedure
To create a custom test for a new custom procedure, click the **New Procedure** button on the **Content Management** screen. Create the procedure as previously described. Select the **Test** subtab. Lippincott Procedures displays a new test form.

1. Click the **Add Question** button to begin adding custom test questions.

2. Select the question type. Enter the question, answer options, correct answer, and rationale. Customize the new test by using icons located on the toolbar. Images may be added. Stedman’s Medical Dictionary is referenced for the spell checker.

3. Click the **Save** button to save each test question. Continue to add and save test questions until the test is completed.

4. When all the test questions are added, return to the **Procedure** subtab. The procedure must be saved in order to save the custom test. On the **Procedure** subtab, click the **Publish** or **Save Draft** button.
   – Click the **Publish** button when you complete your custom changes and want the procedure and test available to all users in your facility.
   – Click the **Save Draft** button if you have not completed the custom changes for your procedure or test. Draft procedures and tests will not be available to users in your facility.

**Creating a Custom Test for an Existing Custom Procedure**

To create a new custom test for an existing custom procedure, select the procedure on the **Content Management** screen. Click the **Edit Content** button. Select the **Test** subtab for the procedure. Lippincott Procedures displays a new test form.

1. Click the **Add Question** button to begin adding custom test questions.
2. Select question type and add questions as described previously.
3. When all the test questions are added, click the **Publish** or **Save Draft** button.
   – Click the **Publish** button when you complete your custom changes and want the test available to all users in your facility.
   – Click the **Save Draft** button if you have not completed the custom changes for your test. You will not be able to assign a draft procedure test.

**Edit a Test**

To edit a test for an existing procedure, select a procedure on the **Content Management** screen. Click the **Edit Content** button and follow these steps.

1. Select the **Test** subtab for the procedure.
2. On the edit question screen, click the **Edit** link to the right of the question.
3. Change the question, answer options, correct answer, or rationale as required.
4. OPTIONAL: Customize the question by using icons located on the toolbar.
5. If you choose to delete a question, click the Delete link to the right of the question.
6. Click the Save button when your changes to the question are complete.
7. Click the Publish, Save Draft, or Close button.
   - Click the Publish button when you complete your custom changes and want the test available to all users in your facility.
   - Click the Save Draft button if you have not completed the custom changes for your test. You will not be able to assign draft procedure tests.
   - Click the Close button if you choose to discard all of your custom changes during your editing session.

---

Delete a Test

From the Test subtab, select a test from the list and click the Delete Test button.

NOTES:
- When you delete a standard test, Lippincott Procedures removes it from display. To restore a standard test for a procedure, see Reinstate a Test.
- Once deleted, custom tests cannot be reinstated.

---

Reinstate a Test

When you delete a standard test, Lippincott Procedures removes it from display.

To reinstate a deleted standard test, click the Reinstate button on the Test subtab. Now the standard test displays in the procedure test assignment list.

---

Maintain Notes

**Add, Edit, or Delete Procedure Notes**

Lippincott Procedures lets you add, edit, or delete procedure-specific notes.

1. To add notes to a procedure:
   - If you are an Administrator or a Level 2 user, select a procedure on the Content Management screen. Click the Edit Content button.
   - If you are a Level 1.5 user, select a procedure on the Content Management screen. Click the Notes button.
2. Select the Notes subtab for the procedure and then select the Procedure subtab under the Notes subtab.
3. Type and format notes details and comments. Images may also be added. Stedman's Medical Dictionary is referenced for the spell checker.
4. OPTIONAL: Tag the note as critical and/or publish the note for all checklists and quick lists for the procedure.

---

5. Click the Publish or Save Draft button.
   - Click the Publish button when you complete your custom notes and want the procedure notes available to all users in your facility.
   - Click the Save Draft button if you have not completed the custom changes for your procedure notes. Draft procedure notes will not be available to users in your facility.

The View Audit Trail button lets you see all users who have updated a procedure note. It contains the date and time that a procedure note was updated and comments included by the user.

Every user who displays the procedure will see a Notes or Critical Notes section link.

The default position for Critical Notes is at the end of the procedure. Administrators can move Critical Notes to the top of the procedure by selecting that option under Default Settings on the Facility tab.

To delete notes from a procedure,

1. Select a procedure from the list on the Content Management screen.
2. Select the Procedure subtab under the Notes subtab.
3. Click the Delete Notes button.
Add, Edit, or Delete Skills Checklist Notes
Lippincott Procedures lets you add, edit, or delete skills checklist specific notes.

1. To add notes to a skills checklist:
   – If you are an Administrator or a Level 2 user, select a procedure on the Content Management screen. Click the Edit Content button.
   – If you are a Level 1.5 user, select a procedure on the Content Management screen. Click the Notes button.
2. Select the Notes subtab for the procedure and then select the Skills Checklists subtab under the Notes subtab.
3. Select the procedure's skills checklist from the drop-down selection.
4. Type and format notes details and comments. Stedman's Medical Dictionary is referenced for the spell checker.
5. OPTIONAL: Tag the notes as critical.
6. Click the Publish or Save Draft button.
   – Click the Publish button when you complete your custom notes and want the skills checklist notes available to all users in your facility.
   – Click the Save Draft button if you have not completed the custom changes for your skills checklist notes. Draft skills checklist notes will not be available to users in your facility.

The View Audit Trail button lets you see all users who have updated the skills checklist note. It contains the date and time that a skills checklist note was updated and comments included by the user.

Every user who displays the skills checklist will see a Notes or Critical Notes section link.

To delete notes from a skills checklist,

1. Select a procedure from the list on the Content Management screen.
2. Select the Skills Checklists subtab under the Notes subtab.
3. Select the procedure's skills checklist from the drop-down selection.
4. Click the Delete Notes button.

Add, Edit, or Delete Quick List Notes
Lippincott Procedures lets you add, edit, or delete quick list specific notes.

1. To add notes to a quick list:
   – If you are an Administrator or a Level 2 user, select a procedure on the Content Management screen. Click the Edit Content button.
   – If you are a Level 1.5 user, select a procedure on the Content Management screen. Click the Notes button.
2. Select the Notes subtab for the procedure and then select the Quick Lists subtab under the Notes subtab.
3. Select the procedure's quick list from the drop-down selection.
4. Type and format notes details and comments. Stedman's Medical Dictionary is referenced for the spell checker.
5. OPTIONAL: Tag the notes as critical.
6. Click the Publish or Save Draft button.
   – Click the Publish button when you complete your custom notes and want the quick list notes available to all users in your facility.
   – Click the Save Draft button if you have not completed the custom changes for your quick list notes. Draft quick list notes will not be available to users in your facility.

The View Audit Trail button lets you see all users who have updated a quick list note. It contains the date and time that a quick list note was updated and comments included by the user.

Every user who displays the quick list will see a Notes or Critical Notes section link.

To delete notes from a quick list,

1. Select a procedure from the list on the Content Management screen.
2. Select the Quick Lists subtab under the Notes subtab.
3. Select the procedure's quick list from the drop-down selection.
4. Click the Delete Notes button.

Add the Same Note to All Procedures
Lippincott Procedures lets you add, edit, or delete the same note to all procedures if you are an Administrator or a Level 2 user.

1. To add the same note to all procedures, select Add the Same Note to All Procedures on the Content Management screen.
2. Type and format notes details and comments. Stedman's Medical Dictionary is referenced for the spell checker.
3. OPTIONAL: Tag the note as critical.
4. Click the Publish button when you complete your custom note for all procedures.

The View Audit Trail button lets you see all users who have updated the procedure note. It contains the date and time that the procedure note was updated and comments included by the user.

Every user who displays the procedure will see a Notes or Critical Notes section link.

The default position for Critical Notes is at the end of the procedure. Administrators can move Critical Notes to the top of the procedure by selecting that option under Default Settings on the Facility tab.

To delete the same note for all procedures,

1. Select Add the Same Note to All Procedures on the Content Management screen
2. Click the Delete Notes button.

Maintain Comments
Add, Edit, or Delete Procedure Comments
Lippincott Procedures lets you add, edit, or delete procedure-specific comments.

1. To add comments to a procedure:
   – If you are an Administrator or a Level 2 user, select a procedure on the Content Management screen. Click the Edit Content button.
   – If you are a Level 1.5 user, select a procedure on the Content Management screen. Click the Comments button.
2. Select the Comments subtab for the procedure and then select the Procedure subtab under the Comments subtab.
3. Type and format comments details. Stedman's Medical Dictionary is referenced for the spell checker.
4. **OPTIONAL:** Publish the comment for all checklists and quick lists for the procedure.

5. Click the **Publish** or **Save Draft** button.
   - Click the **Publish** button when you complete your custom comments and want the procedure comments available to all users in your facility.
   - Click the **Save Draft** button if you have not completed the custom changes for your procedure comments. Draft procedure comments will not be available to users in your facility.

The **View Audit Trail** button lets you see all users who have updated a procedure comment. It contains the date and time that a procedure comment was updated by the user.

Every user who displays the procedure will see a Comments section link at the end of the procedure.

To delete comments from a procedure,

1. Select a procedure from the list on the **Content Management** screen.
2. Select the **Comments** subtab under the **Comments** subtab.
3. Click the **Delete Comments** button.

**Add, Edit, or Delete Skills Checklist Comments**

Lippincott Procedures lets you add, edit, or delete skills checklist specific comments.

1. To add comments to a skills checklist:
   - If you are an Administrator or a Level 2 user, select a procedure on the **Content Management** screen. Click the **Edit Content** button.
   - If you are a Level 1.5 user, select a procedure on the **Content Management** screen. Click the **Comments** button.
2. Select the **Comments** subtab for the procedure and then select the **Skills Checklists** subtab under the **Comments** subtab.
3. Select the procedure's skills checklist from the drop-down selection.
4. Type and format comments details. Stedman's Medical Dictionary is referenced for the spell checker.
5. Click the **Publish** or **Save Draft** button.
   - Click the **Publish** button if you have completed your custom comments and want the skills checklist comments available to all users in your facility.
   - Click the **Save Draft** button if you have not completed the custom changes for your skills checklist comments. Draft skills checklist comments will not be available to users in your facility.

The **View Audit Trail** button lets you see all users who have updated a skills checklist comment. It contains the date and time that a skills checklist comment was updated by the user.

Every user who displays the skills checklist will see a Comments section link.

To delete comments from a skills checklist,

1. Select a procedure from the list on the **Content Management** screen.
2. Select the **Skills Checklists** subtab under the **Comments** subtab.
3. Select the procedure's skills checklist from the drop-down selection.
4. Click the **Delete Comments** button.

**Add, Edit, or Delete Quick List Comments**

Lippincott Procedures lets you add, edit, or delete quick list specific comments.

1. To add comments to a quick list:
   - If you are an Administrator or a Level 2 user, select a procedure on the **Content Management** screen. Click the **Edit Content** button.
   - If you are a Level 1.5 user, select a procedure on the **Content Management** screen. Click the **Comments** button.
2. Select the **Comments** subtab for the procedure and then select the **Quick Lists** subtab under the **Comments** subtab.
3. Select the procedure's quick list from the drop-down selection.
4. Type and format comments details. Stedman's Medical Dictionary is referenced for the spell checker.
5. Click the **Publish** or **Save Draft** button.
   - Click the **Publish** button when you complete your custom comments and want the quick list comments available to all users in your facility.
   - Click the **Save Draft** button if you have not completed the custom changes for your quick list comments. Draft quick list comments will not be available to users in your facility.
The **View Audit Trail** button lets you see all users who have updated a quick list comment. It contains the date and time that a quick list comment was updated by the user. Every user who displays the quick list will see a Comments section link.

To delete comments from a quick list,

1. Select a procedure from the list on the **Content Management** screen.
2. Select the **Quick Lists** subtab under the **Comments** subtab.
3. Select the procedure’s quick list from the drop-down selection.
4. Click the **Delete Comments** button.

### Maintain Procedure Information

Lippincott Procedures lets you add, edit, or delete procedure information that includes facility review information, procedure assignments to facilities, and keywords.

1. To add procedure information to a procedure:
   - If you are an Administrator or a Level 2 user, select a procedure on the **Content Management** screen. Click the **Edit Content** button.
2. Select the **Procedure Information** subtab for the procedure.

#### Add or Delete Procedure Facility Review Information

1. To add facility review information to a procedure:
   - If you are an Administrator or a Level 2 user, select a procedure on the **Content Management** screen. Click the **Edit Content** button.
2. Select the **Procedure Information** subtab for the procedure.
3. Select **Facility Review Information** for the procedure.
4. The **Created by:** field will be automatically populated by the user entering the Facility Review Information.
5. All other fields are optional.

The last entered “Approved by” names and Reviewed Date will appear in a Facility Review section at the end of the procedure visible to all users.

The **Procedure Review Comments** field and **Next Review Date** fields are for administrative view only.

To delete facility review information from a procedure,

1. Select a procedure from the list on the **Content Management** screen.
2. Select **Facility Review Information** for the procedure.
3. Click the **X** for the facility review information that needs to be deleted.

### Assign Procedure to Facilities
If your healthcare system is required by regulatory or accreditation standards or system policy to indicate that a specific procedure applies to a specific facility or facilities within your organization, Lippincott Procedures provides this functionality. The following notation will appear in the left border of the selected procedure:

Your institution name applies this procedure for:
- Facility A
- Facility B
- etc.

To manage your facility names, select the Assign Procedures to Facilities link on the Content Management tab.

Now you can add, change, delete, or assign facility names to procedures for your institution. You can also generate a facility names report that lists the procedures and their facility assignments.

To assign facility names to multiple procedures, select the required facilities and click Assign Facility Names.

After the facilities are assigned to the procedures, the following notation will appear in the left border of each procedure:

Your institution name applies this procedure for:
- Facility A
- Facility B
- etc.

You can also assign facility names when editing a specific procedure.

1. To assign facility names to a procedure:
   - If you are an Administrator or a Level 2 user, select a procedure on the Content Management screen. Click the Edit Content button.
   - Select the Procedure Information subtab for the procedure.
   - Select Assign Procedure to Facilities for the procedure.
Every user who displays the procedure will see the facility assignment in the left border of the procedure.

**Keywords**

1. To add search keywords to a procedure:
   - If you are an Administrator or a Level 2 user, select a procedure on the Content Management screen. Click the Edit Content button.
2. Select the Procedure Information subtab for the procedure.
3. Select Keywords for the procedure.
4. Enter keywords to help your institution's users locate the procedure when performing searches.

**Assignments**

The Administrator, Level 2, Level 1.5, and Level 1 users can assign Tests and Skills Checklists. To gain access, click the Assignments tab. Now you can assign Tests and/or Skills Checklists.

**Assigning Tests**

To assign tests, click the Assignments tab and follow these steps.

1. Check the box preceding the tests to be assigned. Then, click the Assign button.
Lippincott Procedures displays the Select Examinees screen.

2. Move Examinees from the **Users and Groups** list box to the **Examinees** list box using the arrow buttons between the two list boxes or select the **All Users** button. Select the "All Groups" drop-down option if you just want to see the groups.

If you wish to filter users by user type, department or title, select "All Users" from the drop down filter. This will then provide the User Type, Department, and Job Title filters that you may use as desired. If you filter the Users list, the **All Users** button will change to the **All Filtered Users** button.
After selecting your users or group Examinees, click the **Confirm Assignments** button. Lippincott Procedures displays the Confirm Assignments screen.

3. Select the **View Assignment Options** button if you need to review or change assignment options. Click the **Finish** button to assign the tests to the Examinees. Lippincott Procedures will add the test assignments to the **Assignment Records** screen and to each Examinee's **My Account** screen.

### Assigning Skills Checklists

To assign skills checklists, click the **Assignments** tab and follow these steps.

1. Check the box preceding the skills checklists to be assigned. Then, click the **Assign** button.
Lippincott Procedures displays the Select Examinees screen.

2. Move Examinees from the Users and Groups list box to the Examinees list box using the arrow buttons between the two list boxes or select the All Users button. Select the "All Groups" drop-down option if you just want to see the groups.

3. There are three drop-down options for selecting an Evaluator:
   - You can select a single Evaluator from the list
   - You can have the Examinee select an Evaluator from a Group
   - You can have the Evaluator claim an evaluation

Move the Evaluator from the Administrators or Groups list box to the Skills Checklist Evaluator list box using the arrow buttons between the two list boxes. After selecting your Examinee or group Examinees and the Evaluator option, click the Confirm Assignments button.
Assigning Tests and Skills Checklists

To assign tests and skills checklists, click the Assignments tab and follow these steps.

1. Check the box preceding the tests and skills checklists to be assigned. Then, click the Assign button.
Lippincott Procedures displays the Select Examinees screen.

2. Move Examinees from the Users and Groups list box to the Examinees list box using the arrow buttons between the two list boxes or select the All Users button. If you wish to filter users by user type, department or title, select “All Users” from the drop down filter. This will then provide the User Type, Department, and Job Title filters that you may use as desired. If you filter the Users list, the All Users button will change to the All Filtered Users button. Select the “All Groups” drop-down option if you just want to see the groups. After selecting your users or group Examinees, click the Select Evaluator button.

Lippincott Procedures will display the Select Evaluator screen.

3. There are three drop-down options for selecting an Evaluator:
   - You can select a single Evaluator from the list
   - You can have the Examinee select an Evaluator from a Group
   - You can have the Evaluator claim an evaluation

Move the Evaluator from the Administrators or Groups list box to the Skills Checklist Evaluator list box using the arrow buttons between the two list boxes. After selecting your Examinee or group Examinees and the Evaluator option, click the Confirm Assignments button.
4. Select the **View Assignment Options** button if you need to review or change assignment options. Click the **Finish** button to assign the skills checklist evaluation to the Examinees and to the Evaluator. Lippincott Procedures will add the skills checklist assignments to the **Assignment Records** screen and to each Examinee’s and Evaluator’s **My Account** screen.

### Manage Curriculums

Select **Manage Curriculums** to add, edit, or delete curriculums for your staff.

<table>
<thead>
<tr>
<th>Date</th>
<th>Curriculum</th>
</tr>
</thead>
<tbody>
<tr>
<td>03/13/2017</td>
<td>CHA Training</td>
</tr>
<tr>
<td>03/12/2017</td>
<td>New Hire Nurse Week 1</td>
</tr>
<tr>
<td>02/04/2017</td>
<td>Orientation for New Nurses</td>
</tr>
</tbody>
</table>

[https://procedures.lww.com/fnp/help/fnp_help.jsp](https://procedures.lww.com/fnp/help/fnp_help.jsp)
To create a new curriculum, select New Curriculum and follow these steps:

1. Enter a Curriculum Name.
2. Select Skills Checklists and/or Tests and then click Add to Curriculum
3. When you have finished adding the Skills Checklists and/or Tests, click the Save button.

To edit an existing curriculum, select a curriculum name on the Manage Curriculums screen, select Edit Curriculum and follow these steps:

1. Revise the Curriculum Name, if needed.
2. To add additional Skills Checklists and/or Tests, select the required Skills Checklists and/or Tests and then click Add to Curriculum
3. To remove Skills Checklists and/or Tests, select the Skills Checklists and/or Tests in the top Curriculum box and select Remove from Curriculum.
4. When you have finished your edits, click the Save button.

To delete an existing curriculum, select a curriculum name on the Manage Curriculums screen and then select Delete Curriculum.

### Assign Curriculum

Select Assign Curriculum to assign a curriculum to your staff. Select Preview Curriculum to preview the curriculum.

### Assignment Records

The Administrator, Level 2, Level 1.5, and Level 1 users can maintain all parts of an assignment record. To gain access, click the Assignment Records tab. Now you can:

- view active and completed assignment records
- delete assignment records
- print assignment records
- export assignment records.
You can filter a search for an assignment record by searching in any of the following fields:

- Examinee
- Group
- Department
- Test/Skills Checklist Name
- Discipline
- Evaluator
- Assigner
- Start Date and End Date

Or, you can leave the fields blank to display all records.

You can also sort any column by clicking on the column header.

### Printing Assignment Records

To print assignment records on the Assignment Records tab, check the boxes of records you want to print and click the Print Selected button.

### Exporting Assignment Records

To export assignment records on the Assignment Records tab, check the boxes of records you want to export and click the Export Selected as CSV button. To export all the assignment records, click the Export All as CSV button. This sends you a link to where you are able to download the records when the file is ready. You can save the exported file to your local computer. Note that the Export All records export file will not be available immediately.

### Deleting Assignment Records

To delete assignment records, check the boxes of records you want to delete and click the Delete Selected button.

### Maintain Facility

To access facility maintenance tasks, click the Facility tab. Lippincott Procedures displays the main facility maintenance screen.

**NOTE:** Only users with Administrator privileges can edit facility information.

From the Facility tab, you can:

- edit the name of the facility that displays on the upper left corner of the Lippincott Procedures interface
- post a facility logo to appear in the upper right of your site and to print with procedures, skills checklists, and quick lists
- manage your facility’s announcements
- view your facility’s subscription information
- manage an OpenURL Link Resolver for viewing full text references within procedures
- view your facility's analytics information
- download your facility's custom procedures, skills checklists, quick lists, and notes.
- export URLs for procedures, checklists and quick lists
- export details for all procedures from the Content Management tab.
- choose the default settings for the facility.
Adding and Editing Facility Name and Facility Logo

From the Facility tab, follow these steps.

1. Type your facility’s name.
2. Enter a file location for the logo.
3. Click the Save Changes button.

NOTE: The facility name and logo displays in the upper right corner of application pages and prints at the top of each page for all procedure previews. The logo prints at the top of the first page for all procedures, skills checklists, and quick lists.

- You can remove a logo at any time by clicking the Clear Image button (4).
- You can hide the text name in the upper right corner by selecting the “Hide the Facility name at the top of the screen” option (5) on this screen.
- Please note: The institution name is a required field for technical support purposes, however, so it cannot be blank on the facility screen.
- We strongly recommend your logo is able to differentiate sites if you hide your facility name (if you have multiple institutions within your Health System each with separate Lippincott Procedures sites).

Facility Announcements Information

The Announcements option provides you with the ability to inform your staff of important information. When there are active announcements, a red star will be added to the House icon at the top of the screen.

Creating Custom Announcements

To create a custom announcement, click the New Announcement button on the Manage Announcements pop-up. Lippincott Procedures displays a pop-up box so you can add the new custom announcement. Add the new announcement subject, descriptive text, and the from-to dates that the announcement will display. Then, click Save. The new announcement will be added to the Manage Announcements pop-up.

Editing a Custom Announcement

On the Manage Announcements pop-up, select a custom announcement name from the list and click the Edit Announcement button. Lippincott Procedures displays a pop-up box with the existing Announcement subject, descriptive text, and the from-to dates. Add or revise the necessary announcement information. Then, click Save.

Deleting a Custom Announcement

On the Manage Announcements pop-up, select a custom announcement name from the list and click the Delete Announcement button.
Facility Subscription Information

The Facility Subscription Information box displays the expiration date for your subscription and the Internet Protocol (IP) address ranges that are authenticated for your facility. IP addresses that are not in the range will not have access to your version of Lippincott Procedures.

Facility OpenURL Link Resolver Information

OpenURL is a standardized format of URL intended to enable Lippincott Procedures users to link to a resource that they are allowed to access. The linking is mediated by a link resolver, which parses the elements of an OpenURL and provides links to appropriate targets available through a library by the use of an OpenURL knowledge base.

To add your Link Resolver information, click the Link Resolver button. Add your Link Resolver URL in the URL field below. You can also optionally upload your Link Resolver image. The Link Resolver will be placed on the same line with the reference Abstract and Complete Reference in the References section of the procedure. If an image is imported, the image will be the link to your Link Resolver. If an image is not imported, the link will be the text link, Full Text (via OpenURL).

Facility Analytics

Facility Analytics provides you with Lippincott Procedures usage data information for your facility. Utilization, customization, and remote user access data updates immediately. All other usage data is available one day after the usage occurs.

Usage data reports are available for desktop as well as app views. To select a particular view, choose from the drop down on the upper left of the analytics screen.

Page views

The page names reflect the actual pages that were viewed by your facility during the time period selected. This may be useful for you in determining procedures that your staff may be unfamiliar with for education purposes or simply monitoring top viewed content. You are able to view all pages viewed or filter by procedure, checklist, quick list, test, image, or video by selecting the filter from the drop down box.

Page view totals

Provides a view of the total number of pages that have been viewed on the site during the specified time period. This information may be helpful in your evaluating usage/adoptive of the site by your staff and determining site training needs based on shift schedules.

– Page view totals configured by hour are limited to two weeks per report.
– Page view totals configured by day are limited to one month per report.

Search terms

The search terms reflect the search terms entered by your users during the specified time period. This may be useful for you in determining topics that your staff may be unfamiliar with for education purposes or simply monitoring usage.
Search totals

Provides a view of the total number of searches that have been entered on the site during the specified time period. This information may be helpful in your evaluating peak and non-peak periods of usage of the site, evaluating adoption of the site by your staff, and determining site training needs.

– Search totals configured by hour are limited to two weeks per report.
– Search totals configured by day are limited to one month per report.

Utilization report

Provides information on the number of users as well as test and checklist records currently in place on your site.

Customization report

Provides information on the customizations that are currently in place on your site.

Remote user access

Allows you to monitor who is accessing your site remotely.

Data within the Page view totals and Search totals reports will configure based on the date range you provide and then sort according to how you want to view the data (by hour, day, week, month, year).

If you wish to view all page views for the months of July, August, and September and you wish to view the traffic by month:

1. Select the Page view totals report.
2. Select configure by Month.
3. Select the full date range for those months.

NOTE: If you were to select a subset date range, the data will reflect those restricted dates and configure to month view but not reflect a full month’s data.

Reports can be printed or exported as a CSV file.

Below is an example of a facility’s Page views report for the period January 1, 2012 through January 22, 2012.

Digital Downloads

If your facility subscribes to the digital download option, you will also view the Digital Download configuration screen from the Facility tab. Access this screen for a detailed help information on this feature as well as to download your content.

Other Facility Options

Custom Procedures, Checklists, Quick Lists, and Notes Download

To export a zip file of all of your facility’s custom procedures, checklists, quick lists, and notes click the Download Customizations button on the Facility screen.

Procedures, Checklists, and Quick Lists URLs

To export the URLs for the procedures, checklists and quick lists for your facility click the Download URLs button on the Facility screen.
Procedure Details

To export a spreadsheet of details of all live procedures on your site from the Content Management tab, click the Download Procedures Details button on the Facility screen.

LMS AICC Packages

Export AICC course packages for LMS integration. Note: an LMS integration key is necessary to implement the AICC packages. Contact Wolters Kluwer Technical Support to request an LMS integration key.

Default Settings

To view or change the default settings for your facility, click the Settings button on the Facility screen. Now you can view or change the following:

- Default Discipline – Choose the default discipline for your facility. Each time a user accesses Lippincott Procedures, the procedures for the selected discipline will immediately display. Individual users may overwrite the facility default discipline on their particular devices. If their preferred default is removed, it will again default to the setting chosen here.
- User Options –
  - Allow user self-enroll – Select this option to activate user self-enroll if your facility has selected the user self-enroll option. Please note that you should not enable the General User self-enrollment option if you are managing users centrally and importing a complete list of users regularly. A full user file import deletes any user that is not on the list (which may mean the deletion of recent self-enrolled users accidentally if not on the file).
  - Welcome emails – Send newly imported users a custom welcome email. This option only applies to users imported via the User tab import functionality. Administrators may modify the template email if desired.
- Standard Procedures Update Preferences –
  - Choose the “Add standard procedures updates to my facility automatically” for the automatic addition of quarterly updates to your facility. This is the default setting.
  - Choose “Download standard procedure updates, but let me choose when to add them to my facility” to be able to add the quarterly updates to your facility when you desire.
- Critical Notes Position – Choose the “Position critical notes at the end of the procedure” or “Position critical notes at the beginning of the procedure.” The default setting is “Position critical notes at the beginning of the procedure.”
- Community tab and Social Media Icons – Select the checkbox to hide the Community tab and the social media icons.
- Facility Time Zone – Select your time zone. Certain dates and times in the application will be set for your time zone. The introduced, revised, or reviewed dates for standard procedures are not affected by this option.
- Facility Analytics Tracking – If you would like to track usage by a Facility/Unit within your particular institution’s site, you have the option to set-up these options and have staff select one upon accessing the site. To set-up the units/facilities, please contact Customer Service to “Enable Facility/Units Analytics Tracking.” Once turned on for your site, you are able to create Facility/Unit names via the Default Settings - Facility Analytics Tracking option. If you have populated your Assign Procedures to Facilities feature, these facilities’ names will populate this feature at initial set-up. This list can be modified without affecting that feature. If you have already set-up this feature in a corresponding Lippincott Advisor subscription, the list from that site will be mirrored in Lippincott Procedures.
- Digital Download – Note: You must contact Wolters Kluwer Customer Support to have Digital Downloads enabled. If your Facility has been activated for Digital Downloads of the current Lippincott Procedures files for your facility, administrators can use this option to download a permanent version of the most current procedures files for your facility. Follow the instructions in the Digital Download help file on the Digital Download Configuration screen.
- Automated FTP User Import Status Email List – Add email addresses for institution users that will receive FTP user update emails. Note: a Wolters Kluwer supplied secure FTP site is required for this option. Contact Wolters Kluwer Technical Support to request a Wolters Kluwer supplied secure FTP site for FTP user imports.
- Assignment Preferences – Choose the Tests and Skills Checklists due dates, the Test score to pass, and the number of times a Test and Skills Checklist can be automatically reassigned.
- Store record assignments option – Choose how you would like to store records on the Assignment Records tab.
- Email Notifications for Tests and Skills Checklists – Choose how you would like to send email reminders to Assignment Examinees and Evaluators.

Click the Save button to save your default settings.
Updates

Lippincott Procedures sends email updates to Administrators who opt-in to our Lippincott Procedures Update Notices. These updates include information about content and new functionality updates. To sign up, select “Yes” to the “I would like to receive Lippincott Procedures Update Notices” option in your Administrator user profile in the Users Tab. We recommend at least one Administrator, per institution, receives these updates.

Cumulative Update Information

The Administrator and Level 2 users can view cumulative update information for standard procedures, checklists, and quick lists. To gain access to this information, click the Updates tab. Now you can:

- view cumulative standard procedures update information by month and year
- select a standard procedure from the alphabetical index list to view the changes completed for each version
- select an active date link to download a PDF for an archived procedure.

Manage Quarterly Updates

The Administrator and Level 2 users can manage quarterly updates for standard procedures. This option must first be selected by the Administrator on the Facility tab (under Default Settings).

To gain access to this option, click Manage Quarterly Updates on the Updates tab.
Now you can:

- view the live version and the available version of standard procedures.
  - The "Live Version" is the version of the standard procedure that is currently live in your account. Note: Live standard procedures are not necessarily active. They may be hidden on your content management tab.
  - The "Available Version" is the most recent version of the standard procedure from Wolters Kluwer. You can preview a live or available version of the procedure. Click on the date of the specified procedure version to open a procedure preview window.

- preview update information for each specific procedure
  - Click the View button in the Preview Update column

- deploy standard procedures to your facility when you desire.
  - To deploy a live available procedure to your site, click the checkbox next to the desired procedure and click Save. The procedure will replace your existing live version and be visible for all staff immediately to view. If the existing live procedure is a custom standard procedure, the deployed procedure will not overwrite the custom procedure. You will need to reinstate it if you wish it to be live.

- edit standard procedures before you deploy them to your facility.
  - If you would like to edit an available procedure before publishing live to your site, click the checkbox next to the desired procedure and click Save. The updated procedure will appear within your Content Management tab and be available for editing. The live version will remain active until the new procedure is published.

**Community**

Coming soon!

**Athens Authentication**

Lippincott Procedures supports Eduserv's Athens Authentication System. To login to Lippincott Procedures with your Athens authentication, click the Athens login link.
Lippincott Procedures redirects you to the Athens Authentication Point page. If necessary, confirm site membership with Athens by clicking the Alternative login link.

From the Athens Authentication Point page, follow these steps:

1. Type your Athens username.
2. Type your Athens password. Username and password fields are case-sensitive.
3. Click the Login button.

Athens authenticates your access and begins your Lippincott Procedures session with access to the general procedure reference view.

If you would like to access your administrative or My Account area using your Athens username and password, visit your My Account screen and add your Athens username credentials. In the future you will be able to authenticate to the reference, administrative, and My Account areas (depending on your username permission level) with your Athens username and password.

---

**Other Institution**

If your facility adopts the SSO authentication, users can access the Lippincott Solutions products via the Other Institution login screen instead of the standard login screen. The user will be prompted for an email address. As part of this process, the authentication system checks the email address associated with that user.

- If the email address matches the email employed by the user prior to federation, the user is recognized, authenticated, and directed to the requested Lippincott Site. Therein the user will find their assignments and assignment records in place before federation.
- If the email address has no matching pre-federated email in Wolters Kluwer, then the user is assumed new to Wolters Kluwer and a new federated general user profile is generated in our system. Subsequently, the user is authenticated and directed to the requested Lippincott site.

Alternately, if someone wants to log into the Lippincott Procedures product using the platform's user repository, they must do so using the standard Lippincott Procedures login option.

---

**Ovid and UpToDate Integration**

For customers of Ovid and/or UpToDate, you may request the Lippincott Procedures Integration with those programs.

**UpToDate** – This provides a link to UpToDate on the Lippincott Procedures menu as well as enables the search to pass terms and references to UpToDate for additional searching. An UpToDate subscription with IP authenticated or username/password access is required for the integration.

**Ovid** – This provides a link to Ovid on the Lippincott Procedures menu as well as enables the search to pass terms to Ovid for a deeper dive search. Links from the reference lists to content in Ovid is also enabled. An Ovid subscription with IP authenticated or username/password access is required for the integration. If you subscribe to the Cochrane Database of Systematic Reviews via Ovid, please notify customer service that you would like these reference links enabled as well.

---

**Ausmed Integration**

For customers whose staff use Ausmed, you may request the Lippincott Procedures integration with that program. This provides a link to Ausmed on the right menu by the print and email icons. It reads “Document CPD”. It enables the user to pass information about specific procedures to Ausmed in order to record their continuing professional development.
**HL7 Infobutton API**

Lippincott Procedures provides an Infobutton API consistent with the HL7 Infobutton standard. These instructions describe the syntax for invoking this API.

An Infobutton is envisaged as an icon placed adjacent to data elements in an electronic medical record system. Behind the icon there would be code that opens a browser window and then directs the browser instance to a specific URL for a monograph in Lippincott Procedures. For example, you might place an Infobutton in an electronic medical record next to a problem list entry. When selected, this Infobutton could be constructed to retrieve Lippincott Procedures information about that particular problem.

**Infobutton API functionality**

The functionality provided by Lippincott Procedures’s HL7 Infobutton API provides your electronic medical record system with the ability to request procedure information by SNOMED CT code.

**How to Use the Infobutton API**

You can create Infobuttons for your end users using the same HTML authoring tools that you use to create intranet or other web pages for your site. You can even type Infobutton requests directly into a browser’s location bar for testing purposes.

The Infobutton API code looks similar to web page URLs, but contains more information. To create Infobuttons for your end users, use the HTML authoring environment of your choice. From there:

1. type procedures.lww.com/lnp/hl7
2. add session parameters, and
3. define parameter values, and
4. link the URL to an information button icon in your HTML authoring environment.

**URL Formatting**

The following criteria must be observed when creating the URLs for your Infobuttons.

- The URL procedures.lww.com/lnp/hl7 is case sensitive.
- The `<PARAMETER_STRINGS>` are not case-sensitive.
- procedures.lww.com/lnp/hl7 must end with the question mark (?) character. To this, you append the first parameter.
- For all parameters after the initial parameter, use the ampersand (&) sign to connect each of the parameters to the URL string.
- HL7 Infobutton URLs are typically very long and in these instructions we will sometimes display them spread over several lines by inserting line breaks after “?” or “&” characters. These line breaks should not be put into actual HL7 URLs.
- Do not type spaces into an Infobutton URL string. Type %20 or + for values that contain spaces, as in the following:
  
  . . . &mainSearchCriteria.c.dn=blood%20pressure
  
  . . . &mainSearchCriteria.c.dn=blood+pressure

**Main Search Criterion**

All HL7 Infobutton requests must contain a main search criterion.

- https://procedures.lww.com/lnp/hl7

  
  mainSearchCriteria.c.cs=<CODE_SYSTEM>
  
  mainSearchCriteria.c.c=<CODE>
  
  mainSearchCriteria.c.dn=<DESCRIPTION>

Requests for information by main search criterion must include either:

- `<DESCRIPTION>`, or
- `<CODE_SYSTEM>` and a `<CODE>`, or
- `<DESCRIPTION>`, a `<CODE_SYSTEM>` and a `<CODE>`.

<table>
<thead>
<tr>
<th>Parameter</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>mainSearchCriteria.c.cs=&lt;CODE_SYSTEM&gt;</td>
<td>Specifies the code system. Only SNOMED CT is currently supported in Lippincott Procedures</td>
</tr>
<tr>
<td>mainSearchCriteria.c.c=&lt;CODE&gt;</td>
<td>Specifies the code for the concept for which information is requested</td>
</tr>
<tr>
<td>mainSearchCriteria.c.dn=&lt;DESCRIPTION&gt;</td>
<td>Specifies a textual description of the concept</td>
</tr>
</tbody>
</table>

For the main search criteria, the values for the code systems and their identifiers supported by Lippincott Procedures are shown in the following table. In the Infobutton URL, these identifiers are provided as the values of the mainSearchCriteria.c.cs parameter (i.e., `<CODE_SYSTEM>`).

**Example:**

```
mainSearchCriteria.c.cs=2.16.840.1.113883.6.96
```

<table>
<thead>
<tr>
<th>Code System</th>
<th>Identifier</th>
</tr>
</thead>
<tbody>
<tr>
<td>SNOMED CT</td>
<td>2.16.840.1.113883.6.96</td>
</tr>
</tbody>
</table>

If Lippincott Procedures recognizes a specified code system, it then conducts a code-specific search. If there is no recognized code or there are no code-specific search results, then the supplied textual description (if any) is used for a search.

**Examples:**

- Search all resources for “Blood Pressure” after providing just a search string:

  https://procedures.lww.com/lnp/hl7?mainSearchCriteria.c.dn=Blood+Pressure

- Search for information associated with a SNOMED CT code. This example displays Lippincott Procedures monograph for 12-Lead ECG Interpretation:

Lippincott Procedures offers free apps for all users associated with a subscribing Lippincott Procedures institutional account.

- They must have at least a general username and password assigned to them in order to access the app, or be able to access the product from within your facility's IP range at least once a month.
- Username and passwords are required to access the testing and checklist evaluation functions available in the app.

**HOW DO I GET ACCESS?**

### Apple Devices

1. Via your iPad or iPhone, go to the Apple Appstore and search for Lippincott Procedures. The download from the Appstore is free.
2. Once you download the app, it will ask you to enter your Lippincott Procedures username and password. Alternately, you can choose the option to authenticate via IP authentication. When you authenticate, it will download your facility's unique version of Lippincott Procedures - customizations and all. NOTE: If you wish to access the app when offline, remember to switch the "Keep me logged in" button to "On".

### Android Devices

1. Via your Android phone or tablet, go to the Google store and search for Lippincott Procedures. The download from the store is free.
2. Once you download the app, it will ask you to enter your Lippincott Procedures username and password. Alternately, you can choose the option to authenticate via IP authentication. When you authenticate, it will download your facility's unique version of Lippincott Procedures - customizations and all. NOTE: If you wish to access the app when offline, remember to switch the "Keep me logged in" button to "On".

### Kindle Fire

1. Via your Kindle Fire tablet, go to the Kindle store and search for Lippincott Procedures. The download from the store is free.
2. Once you download the app, it will ask you to enter your Lippincott Procedures username and password. Alternately, you can choose the option to authenticate via IP authentication. When you authenticate, it will download your facility's unique version of Lippincott Procedures - customizations and all. NOTE: If you wish to access the app when offline, remember to switch the "Keep me logged in" button to "On".

**WHAT IS INCLUDED?**

- You are able to access your facility's procedures and their associated quick lists, checklists, images, and videos. All of your standard Lippincott content and your customizations (notes and custom procedures) are visible.
- If logged in with a username and password, you are also able to access your "My Account" area which enables you to take Skills competency tests and complete Skills checklist evaluations from your app.
- The images and videos (due to their size) will be saved to your device once you view that video clip or image and in doing so, making the image or video available later if you are offline. As a result, only video clips and images you have viewed previously will be available when offline. If you are online, you should be able to see all images and standard Lippincott videos without problem.

### Staff

**Chief Nurse**
Anne Dabrow Woods, DNP, RN, CRNP, ANP-BC, AGACNP-BC

**Product Director**
Claudia Vaughn

**Senior Digital Product Manager**
Carolyn Dalton

**Editor-in-Chief, Lippincott Solutions, Point of Care**
Colette Bishop Hendier, RN, MS, MA, CIC

**Clinical Project Manager**
Robin Coyne MSN, RN, AGACNP-BC

**Clinical Editors**
Debra Bakerjian, PhD, APN, FAAN, FAAN, FAANP; Joanne M. Bartelmo, RN, MSN; Pamela Kovach, RN, BSN; Anita Lockhart, RN, MSN; Katie Manoy MSN, RN, CPNP; Colleen Nicholson-Toebe MSN RN CWCN RAC-MTA RAC-N, Janet Rader, RN, BSN; Joan M. Robinson, MSN, RN; Kristen Szymonik, BS, RRT, AE-C

**Senior Project & Program Manager**
John Macalino

**Senior Managing Editor**
Jeff Wallover

**Associate Managing Editor**
Katherine Bortz

**Editors**
Jaime Buss, Julie Catagnus, Tracy Diehl, Margaret Eckman, Brenna Mayer, Nancy Priff, Liz Schaeffer, Debra Share, Susan Williams

**Copy Editors**
Jerry Altobelli, Heather Ditch

**Art Director**
Elaine Kasmer

**Illustrators**
Joseph John Clark, Jacalyn Facciolo, Judy Newhouse

**Editorial Assistants**
Linda Ruhf

**Lippincott Procedures Australia**
Publishing Director - Asia Pacific
Vaughn Curtis

**Project Manager - Publishing**
Helena Klijn

### Footnote