

Instrument Manager™

Foundations of Rule Writing

Blended Course

Course Description

Foundations of Rule Writing is an immersive learning journey. This blended course introduces the techniques of rule writing while focusing on the fundamentals needed to successfully incorporate rules into a lab workflow. The curriculum includes writing, testing, and managing rules within a virtual lab environment.

Course Overview

- Blended learning course
- Six virtual Instructor-Led Training (ILT) sessions
- One to two hours of self-paced eLearning Prep Work prior to class start
- One to two hours of self-paced eLearning between virtual ILT sessions

Course length: One week of Prep Work and three weeks ILT

Course Objectives

- Demonstrate how to design, create, test, and document rules
- Explain how rule placement impacts order and result messages
- Describe the major components of the rules application
- Apply concepts of performing calculations, adding indices, using value lists, and parent/child associations
- Identify request and result rules

Prerequisites

No prerequisite courses are required. Participants should have a basic knowledge of Instrument Manager, internal laboratory workflows, and an understanding of their Laboratory Information System (LIS).

Technology Requirements

- A dual extended monitor set up is required with at least one large monitor (i.e. 22 in)
- A microphone is required
- Access to AWS WorkSpaces (may require your IT security access)

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Course Agenda - Prep Work

Complete the required eLearnings prior to the first day of class. Prep Work is self-paced. Access granted one week prior to first instructor led session.

- Data Flow & Rule Locations
- Drivers, Configurations, & Connections
- Data Elements and the Specimen Event Log (SEL)
- Rule Writing 101
- Rule Writing Techniques

Course Agenda - Week One

Day One ILT

- Welcome and Introductions
- Practicing Add and Hold Test Actions
- Working with Panes and the Toolbox
- Applying the Is Numeric Operator

Day Two ILT

- Working with Operators: NOT, NULL, Any, and That
- Hold Test Results with Error Codes
- Remove Tests Using the Cancel Test Action

Course Agenda - Week Two

Day Three ILT

- Writing Rules for a Workflow using the SM Workspace
- Modify Results with the Set Action
- Differentiate Operators: Extract Section of vs Extract Component of

Day Four ILT

- Evaluating Ranges with OR Operator
- Ordering Tests utilizing Actions Add Test and Set
- Using the Else Statement
- Errors Demonstration

Course Agenda - Week Three

Day Five ILT

- Converting Rules with Value List
- Understanding User Fields by Parking Data
- Setting up Language Locale
- Applying Round Action to Calculation Rules

Day Six ILT

- Value Lists Maintenance for Parent/Child Rules
- Importing and Exporting Rules
- Common Errors When Writing and Testing Rules

Topics Covered in Self Paced Sessions

- Rule Writing Techniques
- Data Elements, Operators, and User-defined Values
- Differentiate Actions: Add vs. Set
- Rules Testing
- Comparing Actions Add Test vs Order Test
- Rule Management Options
- Streamlining Rules Using Value Lists
- Parent/Child Rules

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Course Agenda - Week One

Day One ILT

Welcome and Introductions
Add Test to Order
Hold a Critical Result
Hold a Critical Result with STAT Priority

Day Two ILT

Hold a Specific Non-Numeric Result
Hold Any Non-Numeric Result
Hold Any Result with Any Error Code
Remove Tests from an Order

Day One Homework

Rule Writing Techniques: Drag and Drop Method
Rule Writing Techniques: Free-Text Method
Data Elements, Operators, and User-Defined Values

Day Two Homework

Rule Testing
Rules for Writing Rules
Comparing Actions: Add vs Set

Course Agenda - Week Two

Day Three ILT

Hold a Critical High Result
Modify Result Based on Hemolysis
Determine Result with Extract Section of

Day Four ILT

Hold Critical Results Based on Range
Setting Test Results
Ordering Tests
The Else Statement
Errors Demonstration

Day Three Homework

Add Test Based on Ordering Physician
Testing Activity
Comparing Actions: Add Test vs Order Test
Rule Management Options

Day Four Homework

Streamlining Rules: Using Value Lists
Result Translation Rule Using a Value List
Parking Data with User Fields

Course Agenda - Week Three

Day Five ILT

Critical Results Value List
Parking Data
Language Locale
Calculation Rules

Day Six ILT

Setting Test Results
Value Lists Details - For Parent/Child Rules
Setting Test Results
Importing and Exporting Rules
Common Errors When Writing and Testing Rules

Day Five Homework

Streamlining Rules: Parent/Child Nesting

