



Sharesource Connectivity Platform User Guide

for Use with the **Homechoice Claria** APD System





**Connectivity Platform User Guide
for Use with the**



APD System

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Contents

1 Glossary

1.1	List of Common Terms	1-1
-----	----------------------------	-----

2 Symbols

2.1	Overview	2-1
2.2	Symbols Used in the Sharesource Portal	2-1
2.3	Symbols Used in This Guide	2-4

3 Warnings

3.1	Definition	3-1
3.1.1	General Warnings	3-1
3.1.2	General Cautions	3-2

4 Introduction to the **Sharesource** Platform

4.1	Sharesource Platform Overview	4-1
4.2	Indications for Use	4-1
4.3	Browser Compatibility	4-2
4.4	Description and Features	4-2
4.5	Navigation	4-3
4.6	Baxter Technical Support	4-6
4.7	Baxter Clinical Support	4-6

5 Logging In and Logging Out

5.1	Overview	5-1
5.2	Logging In	5-1
5.2.1	Initial Login	5-2
5.2.2	Returning User Login	5-3
5.2.3	If You Forget Your Password	5-3
5.3	Logging Out	5-5
5.4	Updating Your Account Settings	5-6
5.4.1	Changing Your Name	5-8
5.4.2	Changing Your Password	5-9
5.4.3	Changing Your Email Address (Username)	5-10
5.4.4	Changing Your Security Question	5-11
5.4.5	Changing Your Language, Primary Clinic, or Email Preferences ..	5-11
5.5	Resetting a User's Password	5-13
5.6	To Log In After Password Is Reset	5-14

6 Treatment Dashboard

6.1	Overview	6-1
6.2	Treatment Dashboard Function	6-1
6.3	Viewing the Treatment Dashboard	6-2
6.3.1	Patient List Filters	6-3
6.4	Viewing the Patient Snapshot	6-4
6.4.1	Total UF Description	6-5
6.5	Viewing the Treatment Summary	6-7
6.6	Patient Search	6-11

7 Device Settings and Templates

7.1	Overview	7-1
7.2	Device Programs, Patient Settings, and System Settings for the Homechoice Claria APD System	7-1
7.2.1	Device Program, Patient, and System Settings Parameters	7-2
7.2.2	Locking or Unlocking Settings	7-2
7.2.3	Designating an Active Device Program	7-2
7.3	Therapy Types	7-3
7.3.1	Continuous Cycling Peritoneal Dialysis/Intermittent Peritoneal Dialysis	7-4
7.3.2	Hi-Dose* CCPD	7-4
7.3.3	Tidal APD	7-5
7.3.4	Hi-Dose* Tidal	7-5
7.4	Device Program Settings	7-6
7.5	Patient Settings	7-11
7.6	System Settings	7-14
7.7	Creating and Editing Device Programs, Patient Settings, and System Settings ...	7-15
7.7.1	Creating or Editing a Device Program	7-15
7.7.2	Viewing or Editing Patient Settings	7-23
7.7.3	Viewing or Editing System Settings	7-28
7.8	Applying a Clinic Template	7-33
7.8.1	Applying a Template to a Device Program	7-33
7.8.2	Applying a Template to Patient Settings	7-35
7.8.3	Applying a Template to System Settings	7-36
7.9	Deleting a Device Program	7-38

8 Reports

8.1	Overview	8-1
8.2	Generating Reports	8-1

8.3	Report Names	8-4
8.3.1	Patient Clinical Data Report	8-5
8.3.2	Patient Treatment History Report	8-6
8.3.3	Prescribed Versus Actual Report	8-6
8.3.4	Treatment Flag and Events Report	8-7
8.3.5	Treatment Summary Report	8-7
8.3.6	Clinic Treatment History Report	8-8
9	Clinic Settings	
9.1	Overview	9-1
9.2	Using Templates	9-1
9.2.1	Creating a Template for a Device Program	9-2
9.2.2	Viewing a Template for a Device Program	9-4
9.2.3	Modifying a Template for a Device Program	9-5
9.2.4	Viewing or Modifying a Template for Patient Settings	9-6
9.2.5	Viewing or Modifying a Template for System Settings	9-9
9.2.6	Deleting a Device Program Template	9-11
9.3	Flag Rule Settings	9-13
9.3.1	Viewing or Modifying Flag Rule Settings	9-15
10	Patient Administration	
10.1	Overview	10-1
10.2	Searching for a Patient	10-2
10.3	Adding a Patient	10-3
10.4	Editing a Patient’s Information	10-5
11	User Management – Setting Up the Dialysis Center	
11.1	Overview	11-1
11.2	Assigning Users	11-1
11.2.1	Adding a New User	11-2
11.2.2	Roles and Permissions	11-6
11.2.3	Searching for a User	11-7
11.2.4	Updating a User’s Information or Site Access	11-8
11.3	Removing and Managing Users	11-10
11.3.1	Removing a User from the Dialysis Center	11-10
11.3.2	Resetting a User’s Password	11-11
11.3.3	Roles and Responsibilities	11-12

12 Frequently Asked Questions

12.1	Getting Help	12-1
12.2	Accessing the Sharesource Portal	12-1
12.3	Treatment Dashboard Questions	12-3
12.4	Data Capture Questions	12-4

Index

Glossary

1.1 List of Common Terms

Abdominal Fullness	A patient's feeling of fullness, sometimes referred to as "overfill" or "overfull." This feeling can come from increased intraperitoneal volume (IIPV), or can come from eating a large meal, constipation, or abdominal masses. See also Increased Intraperitoneal Volume (IIPV) , Intraperitoneal Volume (IPV) , and Overfill .
Active Device Program	The designated default Device Program used for a patient's treatment. There must always be an Active Device Program set up in the portal and, while a Device Program is designated as the Active Device Program, it cannot be deleted. Even if the user changes the program for one treatment, the default will reset to the Active Device Program when the user prepares for the next treatment.
Automated Peritoneal Dialysis (APD)	Automated PD is any form of peritoneal dialysis that is performed by a mechanical device known as a cycler. Once settings are entered, treatment is performed automatically, generally while the patient is asleep. The Homechoice Claria APD system that the Sharesource platform connects to performs APD therapy.
Blood Pressure, Diastolic	The bottom number of a blood pressure (mmHg) reading. It measures when the patient's heart relaxes.
Blood Pressure, Systolic	The top number of a blood pressure (mmHg) reading. It measures when the patient's heart pumps blood.
Continuous Ambulatory Peritoneal Dialysis (CAPD)	A manual type of peritoneal dialysis that does not use a cycler and cleans the blood continuously, both day and night. If a patient performs CAPD, no treatment data will transmit to the Sharesource platform.
Continuous Cycling Peritoneal Dialysis (CCPD)	CCPD is a form of APD. It is a continuous therapy in which a cycler performs exchanges while the patient sleeps. To set a patient's treatment to a CCPD treatment, select No on the Tidal Mode drop-down menu in the Sharesource portal.

1. Glossary

Cycle	In peritoneal dialysis, a cycle consists of three phases: a Fill phase, a Dwell phase, and a Drain phase. Every APD therapy contains one or more cycles. and the Sharesource platform records information about cycles that occurred during a patient's treatment. See also Exchange and Phase .
Cycler	A medical device that performs peritoneal dialysis solution exchanges in regular cycles. The Homechoice Claria APD system device is a cycler. The Sharesource platform communicates with this cycler to transmit and receive a patient's treatment data.
Day Therapy	Determines whether a patient will have a 24-hour therapy with additional daytime exchanges, which can help improve the adequacy of the dialysis treatment. If this option is selected, settings for Day Fill Volume and the Number of Day Cycles will also need to be programmed in the portal.
Day Fill Volume	The volume of solution to be delivered to the patient's peritoneal cavity during each day cycle. This setting will only appear in the Sharesource portal when Day Therapy is set to Yes, and the volume's range will change depending on if Low-Fill or Standard is selected for the Therapy Mode.
Dextrose	<p>A form of sugar that is an ingredient in most of the solutions used for peritoneal dialysis. The dextrose draws extra fluid from the body into the dialysis solution. Depending on your region, the word, "glucose" may be used instead.</p> <p>In the Sharesource portal, "Same Dextrose" indicates to the device that the Last Fill solution bag should use the either the same or a different concentration from the rest of the night therapy. This setting will only appear if Last Fill is set to Yes.</p>
Dialysis	The process of removing waste from the blood artificially using special equipment. The two major forms of dialysis are hemodialysis and peritoneal dialysis. See also Peritoneal Dialysis (PD) .
Dialysis Solution	Solution used to remove wastes from the blood. Hemodialysis and peritoneal dialysis use different forms of dialysis solution. Both solutions have compounds found in the body.
Drain / Full Drain	<p>The removal of fluid from the peritoneal cavity. Depending on the time of day and type of therapy, the amount of fluid drained may be a complete Drain or a partial Drain (a partial Drain is used in Tidal therapy).</p> <p>The volume of fluid is measured in milliliters (mL). One liter is equal to 1000 milliliters.</p>
Drain Volume	The volume of a Drain after a Dwell cycle.

Dwell	The phase when fluid remains in the body during each cycle. Dwell is part of the therapy cycle.
Dwell Time	The amount of time the fluid remains in a patient's body during each cycle. Clinicians can decide if a patient's Dwell Times are automatically adjusted and if an actual Dwell Time that is less than a programmed Dwell Time should be considered a flag event using the Sharesource portal.
Exchange	The process of draining used solution from the abdomen and filling the abdomen with new solution. See also Cycle and Phase .
Fill Volume	The volume of solution to be delivered to the peritoneal cavity during each cycle. The daytime Fill Volume and nighttime Fill Volume can be set using the Sharesource portal.
First Fill	The first Fill cycle of a patient's therapy following an Initial Drain.
Fluid Overload	Too much fluid in the body. This is caused by more fluid going into the body than is coming out. Fluid overload can be dangerous to the heart.
Flush Before Fill	A System Setting in the portal that determines if a patient's cyclor pumps dialysis solution from the supply bags to drain lines after supply line connections have been made. This helps reduce potential contamination before Fill.
Glucose	Another term for dextrose. See also Dextrose .
Hi-Dose* CCPD / Hi-Dose* Tidal	<p>The goal of Hi-Dose therapy is to provide a 24-hour therapy that combines conventional nighttime therapies, such as CCPD or Tidal, with more than one daytime exchange. This may help improve the adequacy of the patient's dialysis treatment.</p> <p>During the Dwell phase of each daytime Hi-Dose exchange, the patient can disconnect from the cyclor and have the freedom to conduct their normal daytime activities.</p> <p>➤ NOTE: *Depending on your location, the term OptiChoice (OCPD) may be used as an alternate to the term Hi-Dose. "Hi-Dose" is used throughout this guide to represent this type of 24-hour therapy.</p>
High Drain	A flag rule in the portal that is triggered if the Drain Volume for Day Fill Volume exchange, Night Fill Volume exchange, and Last Fill Volume exchange is more than a specific threshold percentage for Standard Mode or Low-Fill Mode.

1. Glossary

Increased Intraperitoneal Volume (IIPV)	A condition when there is more fluid in the abdomen than was prescribed. This condition is sometimes called “overflow.” IIPV could result in a feeling of abdominal discomfort, serious injury, or death.
Initial Drain	The Drain phase that occurs at the beginning of each therapy, before the first regular cycler Fill.
Initial Drain Bypass	<p>On the Device Program screen, a Device Program Setting that indicates if Initial Drain Bypass option is enabled for the patient.</p> <p>This setting only appears in the Sharesource portal when the Therapy Mode is set to Standard.</p> <p>On the Treatment Summary, a Device Program detail value that indicates if Initial Drain Bypass option was enabled during a patient’s treatment.</p>
Initial Drain Volume	<p>On the Device Program screen, a Device Program setting that determines the minimum amount of Drain volume expected during Initial Drain.</p> <p>On the Treatment Summary, a Device Program detail value calculated during a patient's treatment.</p>
Initial Drain Time	The amount of time that must be spent in Initial Drain before transitioning to the next therapy phase pending an empty detection condition. This setting only appears in the Sharesource portal when the Therapy Mode is set to Low-Fill.
I-Drain Volume	The amount of fluid drained from the peritoneal cavity during Initial Drain. See also Initial Drain Volume .
Intermittent Peritoneal Dialysis (IPD)	A form of peritoneal dialysis in which dialysis sessions take place two to four times a week, 12 to 20 hours per session. The dialysis solution is drained completely at the end of the session and the peritoneal cavity remains empty between the sessions.
Intraperitoneal Volume (IPV)	The amount of fluid in the peritoneal cavity at a given point in time.
Last Fill	The last Fill phase before the end of a treatment where the last Fill dialysis solution stays in the peritoneal cavity during the day. This is also the name of a Device Program setting in the Sharesource portal. If set to Yes in the portal, values for Same Dextrose and Last Fill Volume must be entered.

Last Fill Concentration	<p>The strength or type of dialysis solution used for the last Fill, as well as the name of a Patient Setting in the portal. The concentration options may vary by geographic location.</p> <p>Additional settings and lists that specify solution types will appear if the Last Fill Concentration is set to Pre in the Patient Settings screen.</p>
Last Fill Manual Drain Alarm	<p>A Device Program setting that only appears if Last Fill Manual Drain is set to Yes. The Last Fill Manual Drain Alarm beeps if the Night Cycle UF Target is not achieved.</p>
Last Fill Manual Drain UF Target	<p>See also Ultrafiltration (UF).</p>
Last Fill Volume	<p>The amount of dialysis solution delivered to the peritoneal cavity during the last Fill at the end of a treatment. In the Sharesource portal, this is the name of a Device Program setting that will only appear if the Last Fill setting is set to Yes.</p>
Last Fill Manual Drain	<p>A Device Program setting in the Sharesource portal that allows for fuller Drains if there is insufficient UF volume during a treatment. If the Last Fill Manual Drain is set to Yes, two additional settings must be programmed: Last Fill Manual Drain Alarm and Last Fill Manual Drain UF Target.</p>
Low-Fill Mode	<p>This mode is available only to patients whose Fill volumes are less than 1000 mL. These patients typically weigh less than 20 kg (44 lbs).</p> <p>If Low-Fill is the selected Therapy Mode in the portal, ranges for certain settings will adjust accordingly to fit the Low-Fill Mode range criteria and additional settings will need to be programmed.</p>
Low Recirculation Volume APD Set with Cassette (Low Recirculation Volume Set)	<p>A disposable set with a 2.3-meter (7.5-foot) patient line made with a smaller inside diameter tubing than the other lines in the set. This reduces the fluid flow to patients using Low-Fill Mode. The internal recirculation volume of this set is 17 mL.</p>
Manual Exchange	<p>An exchange done without a cycler. See also Continuous Ambulatory Peritoneal Dialysis (CAPD).</p>
Minimum Drain Volume (mL)	<p>A calculated value used to determine the minimum amount of Drain Volume expected during each Day Drain or Night Drain. It is the Minimum Drain Volume percentage multiplied by the Fill Volume.</p>
Minimum Drain Volume Percentage (Min Drain Volume %)	<p>A Device Program setting that determines what minimum percent of the Fill Volume is expected to be drained.</p>

1. Glossary

Modem	An electronic device supplied by Baxter that enables the transmission of data between the Homechoice Claria APD system and the Sharesource connectivity platform. An Ethernet cable connects the modem to the Homechoice Claria APD system.
Night Concentration 1	This is the concentration of the primary solution bag placed on the cyclor's heating pan. This will be in the portal as a part of certain reports and as part of the Treatment Summary.
Night Concentration 2	This concentration is for the supply solutions that may be different from the Night Concentration 1 heater bag solution. This will be in the portal as a part of certain reports and as part of the Treatment Summary.
Night Therapy Time	A Device Program setting in the portal. This is the length of time (in hours and minutes) a treatment takes to complete.
Night Cycle UF	See also Ultrafiltration (UF) .
No Flow	This occurs when there is no measurable flow rate of solution. No Flow can reduce the Dwell Time and decrease the amount of effective dialysis time. This can be caused by a kink or closed clamp on one or more of the lines or by an empty bag.
Number of Day Cycles	Number of daytime exchanges. In the portal, this will only appear if Day Therapy is set to Yes.
Number of Manual Exchanges	A treatment detail found on some Sharesource platform reports that indicates how many times in a treatment that a patient performed an exchange without using a cyclor.
Overfill	A feeling of fullness in the abdomen. This feeling can come from IIPV or can come from eating a large meal, constipation, or abdominal masses. See also Abdominal Fullness, Increased Intraoperative Volume (IIPV), and Intraoperative Volume (IPV) .
Patient Activation Code	<p>The Patient Activation Code (PAC) is a unique ten-digit code that is used to identify a patient by name and date of birth and to transmit the prescribed therapy settings to the device. It is also used by patients to connect their device to the Sharesource platform.</p> <p>The clinician can obtain the PAC from the device settings screen and will need to communicate the PAC to the patient.</p> <p>When the patient enters their PAC in the Homechoice Claria APD system, the patient's name and date of birth are automatically linked to the Homechoice Claria APD system.</p>
Patient Snapshot	A feature in the portal that provides an overview of the patient's treatment.

Peritoneal Dialysis (PD)	<p>A form of dialysis that uses the lining of the abdomen, called the peritoneal membrane, as a filter to remove waste products from the body.</p> <p>Peritoneal dialysis can be performed with or without a cycler. Patients who use the Homechoice Claria APD system that is connected to the Sharesource platform use peritoneal dialysis for their therapy. See also Automated Peritoneal Dialysis (APD) or Continuous Ambulatory Peritoneal Dialysis (CAPD).</p>
Phase	<p>Part of a cycle or exchange in peritoneal dialysis. Each cycle has three phases: a Fill phase, a Dwell phase, and a Drain phase. See also Cycle and Exchange.</p>
Pre-Blood Pressure	<p>A patient's blood pressure measured before the start of a treatment. The Sharesource portal allows the clinician to determine whether a pre-treatment blood pressure reading is taken or not.</p>
Pre-Weight	<p>A patient's weight taken before the start of a treatment. When Weight is set to Pre in the Patient Settings screen in the Sharesource portal, the patient inputs this information on their cycler before they begin their treatment</p>
Priming	<p>The process the system uses to fill all tubing lines with solution. Priming removes air from the lines in preparation for therapy.</p>
Pushback	<p>The process by which a small amount of fluid is pushed back from the cycler to the patient. This verifies that the patient line is not occluded when a Drain ends due to No Flow. This small amount of fluid is accounted for in the patient's next Fill Volume.</p>
Sharesource Connectivity Platform	<p>A web-based connectivity platform that allows authorized users, including nephrologists, clinicians, and nurses in the dialysis center, to remotely view and manage treatment information sent from the Homechoice Claria APD system.</p> <p>Data about a patient's treatment is available to authorized users for viewing, programming, or editing from the Sharesource web portal. Settings and Device Program information can be managed remotely and various summary reports can be generated.</p> <p>The patient's dialysis center determines whether they can use the Sharesource platform with their Homechoice Claria APD system. The patient must accept the Sharesource Patient Consent in order to use the Sharesource platform with their cycler. If the patient does not accept this consent, you will not see their data in the Sharesource portal.</p>

1. Glossary

Slow Flow	This occurs when the flow rate of solution is very slow. Slow Flow can reduce the Dwell Time and decrease the amount of effective dialysis therapy. This can be caused by a partial kink or closed clamp on one or more of the lines or by an empty bag.
Solution Bags	Bags that contain the prescribed dialysis solution for the patient's therapy.
Standard Fill Mode (Standard Mode)	The Standard Fill operating mode is typically prescribed for patients with Fill volumes over 1000 mL. These patients typically weigh more than 20 kg (44 lbs). If Standard is the selected Therapy Mode in the portal, ranges for certain settings will adjust accordingly to fit the Standard Mode range criteria.
Tidal Drain Volume	The Tidal Drain Volume is the expected night cycle drain volume based on Tidal therapy settings. The target Tidal Drain Volume equals the volume filled plus the UF Per Cycle volume.
Tidal Peritoneal Dialysis (TPD)	Tidal peritoneal dialysis (in this guide shortened to "Tidal") is a form of APD where only a portion of the solution in the peritoneal cavity is drained and filled each cycle. In the Sharesource portal, additional settings must be programmed if the Tidal setting is set to Yes.
Tidal Fill Volume	The volume of solution set to fill the peritoneal cavity during each Tidal cycle. The Tidal Fill Volume is calculated rather than manually programmed in the portal.
Tidal Volume Percent	The Tidal Volume expressed as a percent (%) of the Fill Volume. This is programmed when Tidal is set to Yes in the Device Program screen.
Total Night UF	See also Ultrafiltration (UF) .
Total Therapy Volume	The volume of all the dialysis solution used for a patient's therapy, including the total Fill Volume and the Last Fill Volume. It does not include the volume used for priming or volume used if Flush Before Fill is set to Yes.
UF Per Cycle	See also Ultrafiltration (UF) .

Ultrafiltration (UF)	<p>UF is the fluid removed from the body as a part of dialysis therapy. It usually represents the difference between the total amount of fluid filled and the amount of fluid drained.</p> <ul style="list-style-type: none">■ Night Cycle UF: Represents the actual night ultrafiltration for each cycle as calculated by the cyclor during therapy.■ Total Cycle UF: Represents the actual total ultrafiltration as calculated by the cyclor during therapy. This would include all night, day, and manual exchange cycles.■ UF per Cycle: This is a calculated value. It is the Total Night UF divided by the number of night cycles.■ Last Fill Manual Drain UF Target: This Device Program setting estimates the minimum amount of UF drained before allowing the last fill cycle. See also Last Fill Manual Drain.■ Total Night UF: The total expected Night UF. Used only during Tidal therapy in order to correctly estimate the volume remaining in the peritoneal cavity after a drain phase.
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1. Glossary

2

Symbols

2.1 Overview

This section defines the symbols used in the **Sharesource** portal as well as in this guide.

2.2 Symbols Used in the *Sharesource* Portal

- **NOTE:**
- Some days may have two or more icons. When you hover over the day, you will see a text box with the description of each icon separated by a line.
 - Two icons in one day usually indicates that two treatments were completed that day

Table 2-1. Symbols Used in the *Sharesource* Portal

SYMBOL	DEFINITION
	The Help button symbol is a link that, when clicked, displays a screen listing available user manuals for your particular region.
	The Add To My Patients List symbol is a button, that when clicked, adds the selected patient to the authorized user's list of patients.
	The Remove From My Patients List symbol is a button, that when clicked, removes the selected patient from the authorized user's list of patients.
	The Treatment Completed symbol appears when the patient has completed the programmed treatment and no flags occurred.
► NOTE: While there may be no dialysis center-determined events present after a patient has completed the programmed treatment, there may still be events, just not dialysis center-configured events.	

2. Symbols

Table 2-1. Symbols Used in the Sharesource Portal (continued)

SYMBOL	DEFINITION
	<p>A high priority flag symbol calls attention to a particular event. Clinicians can determine what events to consider a high priority in the Flag Rules screen. See Table 9-2 for more information on flag rules.</p> <p>If more than one flag occurred during a treatment, a number next to the flag, as well as layered flags indicating the number of occurrences, will appear.</p>
	<p>A priority flag symbol calls attention to a particular event. Clinicians can determine what events to consider a priority in the Flag Rules screen. See Table 9-2 for more information on flag rules.</p> <p>If more than one flag occurred during a treatment, a number next to the flag, as well as layered flags indicating the number of occurrences, will appear.</p>
	<p>The No Treatment Data symbol appears when there is no treatment data for that day.</p>
	<p>The No Communication symbol appears when there is no communication between the cyclor and the dialysis center.</p>
<p>► NOTE: Clicking the No Treatment Data and No Communication symbols will not display additional information.</p>	
	<p>The Multiple (3+) Treatments symbol appears if a patient completes more than 2 treatments in one day. Hover over the Multiple (3+) Treatments icon to display the status for each of a patient's treatments for that day.</p>
<p>► NOTE: Clicking on the Multiple (3+) Treatment symbol opens a pop-up window that displays a box for each of the treatments. Click on a treatment's box to display a Treatment Summary for that treatment.</p>	
	<p>After clicking Submit, the Error Message symbol appears if required information is missing or invalid when creating a setting or template. You must supply the necessary information to save your updates.</p>

Table 2-1. Symbols Used in the *Sharesource* Portal (continued)

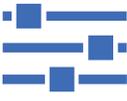
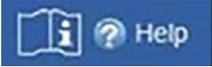
SYMBOL	DEFINITION
	After clicking Submit, the Success Message symbol appears if all required information has been successfully entered into a setting or template or if no treatment data is found for a given timeframe.
	The Treatment Reviewed symbol indicates that a specific treatment has been reviewed by an authorized user in the dialysis center.
	Click the Patient Snapshot icon on the Dashboard and the Patient Snapshot will appear.
	Click the Device Settings icon on the Dashboard and the Device Settings will appear.
	The Additional Information symbol appears to tell you when there is additional information in the portal, such as when a selected Device Program is the Active Device Program.
► NOTE: The Additional Information symbol is only found in the Legend in the Patient Snapshot and only displays for a patient who uses multiple dialysis systems.	
	The Initial Drain Bypass Enabled symbol indicates that the Initial Drain Bypass option was enabled on the device when the therapy was performed.

Table 2-2. Additional Symbols Used in the *Sharesource* Portal

Symbol Graphic and Ref Number	Symbol Title	Symbol Description (Explanatory Text)	Title and Number of Standard
5.4.3 	Consult instructions for use, eIFU indicator	Indicates the need for the user to consult the instructions for use and the instructions for use are available in an electronic format.	ISO 15223-1 ¹

¹ISO 15223-1:2016 Medical Devices - Symbols to be used with medical device labels, labeling and information to be supplied Part 1:General Requirements.

2.3 Symbols Used in This Guide

Table 2-3. Symbols Used in this Guide

Symbol Graphic and Ref Number	Symbol Title	Symbol Description (Explanatory Text)	Title and Number of Standard
 0123	CE Conformity Marking	This device meets the requirements of Council Directive 93/43/EEC.	N/A
5.1.1 	Manufacturer	Indicates the medical device manufacturer, i.e., the natural or legal person with responsibility for the design, manufacture, packaging, and labeling of a device before it is placed on the market under his own name.	ISO 15223-1 ¹
	General Caution Symbol	CAUTION. Refer to Table 3-2 for the definition of a caution.	N/A
	General Warning Symbol	WARNING. Refer to Table 3-1 for the definition of a warning.	N/A

¹ISO 15223-1:2016 Medical Devices - Symbols to be used with medical device labels, labeling and information to be supplied Part 1:General Requirements.

3

Warnings

3.1 Definition

Table 3-1. WARNING - DEFINITION

WARNING	
	Warnings are related to things that can cause harm. They will be identified by a WARNING header and an icon throughout this guide. Read all warnings, cautions, and instructions carefully before use. Improper use of the <i>Homechoice Claria</i> APD system or Sharesource connectivity platform can result in serious injury or death.

Pay special attention to the specific, point-of-use warnings located throughout this guide, as well as the general warnings listed below.

3.1.1 General Warnings

WARNING	
	Do NOT operate the Homechoice Claria APD system or Sharesource connectivity platform until you receive thorough training from a qualified medical professional on its safe and effective use, and read the entire contents of the <i>Homechoice Claria APD System Patient At-Home Guide</i> , the <i>Homechoice Claria APD System Clinician Guide</i> , and this guide. Improper use of these devices can result in serious injury or death.
	Never use a dialysis system without an individual patient program developed by the supervising physician. Serious injury or death can occur if the dialysis system is not used as prescribed and without the guidance of the physician.

3. Warnings

3.1.2 General Cautions

Table 3-2. WARNING - CAUTION

CAUTIONS
CAUTION indicates a hazard with a low level of risk which, if not avoided, could result in minor or moderate injury.

4

Introduction to the *Sharesource* Platform

4.1 *Sharesource* Platform Overview

CAUTION: Federal (U.S.A.) Law restricts this device to sale by or on order of a physician.

► **NOTE:** This law is only applicable to devices sold in the United States of America.

Sharesource is a web-based connectivity platform that allows authorized users, including nephrologists, clinicians, and nurses in the dialysis center, to remotely view and manage treatment information sent from the **Homechoice Claria** Automated Peritoneal Dialysis (APD) system.

Data about a patient's treatment is available to authorized users for viewing, programming, or editing from the **Sharesource** web portal. Settings and Device Program information can be managed remotely and various summary reports can be generated.

For help, click the **Help** button  at any time. When clicked, a screen listing available user manuals for your particular region will appear.

► **NOTE:** Please refer to the *Homechoice Claria APD System Patient At-Home Guide* and the *Homechoice Claria APD System Clinician Guide* for further instructions regarding proper use of the **Homechoice Claria** APD system. You should never use the **Homechoice Claria** APD system until you have read the entire contents of these guides and have been properly trained.

4.2 Indications for Use

The **Sharesource** portal is intended for use by healthcare professionals to remotely communicate with compatible dialysis instruments and transfer data to a central database to aid in the review, analysis, and evaluation of patients' historical treatment results. This system is not intended to be a substitute for good clinical management practices nor does its operation create decisions or treatment pathways.

4.3 Browser Compatibility

Most current browsers will work well with the Sharesource platform. If you experience problems with your browser, see “Q: Why am I having trouble viewing certain web pages?” on the Sharesource Help & FAQs screen.

If you need assistance accessing the **Sharesource** portal, see [Accessing the Sharesource Portal](#).

4.4 Description and Features

The **Sharesource** platform provides a connection between clinicians and their patients. It includes a web portal for accessing treatment information that:

- Is password-protected and tracked
- Allows users to view and manage treatment information
- Remotely communicates with compatible dialysis instruments
- Transfers data to a central database
- Aids in the review, analysis, and evaluation of a patient's historical treatment results

Access the **Sharesource** portal to:

- Update your account information
- Search for other users at your dialysis center
- View patient information, Device Programs, and patient treatment data
- Work with templates
- Generate reports

The **Sharesource** portal:

- Is not intended to be a substitute for clinical practice
- Does not create decisions or treatment pathways

4.5 Navigation

The **Sharesource** portal utilizes website navigational features that help you navigate around the website. These features include:

Table 4-1. Navigation Features

FEATURE	EXAMPLE	DEFINITION
Link	Legend	A link is a word, phrase, or graphic within a computer or Internet screen that, when clicked with the mouse cursor, will transfer the user to another location within the Sharesource portal or to another site.
Web browser navigation buttons		The Web browser navigation buttons on a web page return a user to the previously visited web page. This feature should NOT be used to navigate within the Sharesource portal. Tabs and links should be used for navigation.
Field	* First Name <input type="text"/>	A field is a place where information can be typed.
Drop-down menu	Adjust Loudness <input type="text" value="Maximum"/> Low Medium High Maximum	A drop-down menu is sometimes referred to as a drop-down list, drop-down box, or a pull-down menu. A drop-down menu appears with a downward-facing arrow and, when the arrow is clicked, a menu or list of items will appear. From this menu or list users can select an option.

4. Introduction to the Sharesource Platform

Table 4-1. Navigation Features (continued)

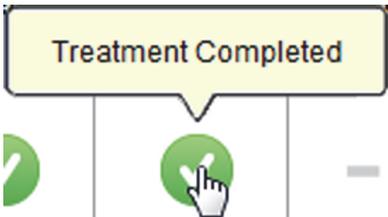
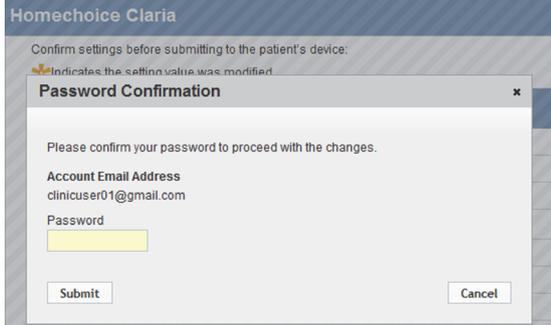
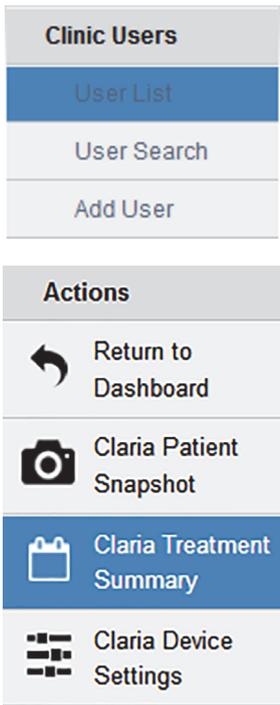
FEATURE	EXAMPLE	DEFINITION
Tabs		<p>Tabs allow the user to move from one web page to another.</p> <p>When clicked with the mouse cursor, the user will be transferred to another location within the Sharesource portal.</p>
Radio button	<p>Same Dextrose</p> <p><input checked="" type="radio"/> Same <input type="radio"/> Different</p>	<p>A radio button is a small circle displayed next to text that lets the user select only one choice from a list of options. The selected radio button contains a black dot and the others that are not chosen are white.</p>
Check box		<p>A check box is a small box that the user can check or uncheck by clicking the mouse cursor over the box. When selected, the box will display an “X” or check mark. When not selected, the box is blank.</p>
Hover		<p>Hover is a term that refers to leaving the mouse cursor on a particular location or object without clicking on it. For example, in the Sharesource portal, leaving the mouse cursor hovering over treatment symbols in certain areas will display a text box that provides more information.</p>
Scroll bar		<p>A scroll bar is a vertical bar on the right side or a horizontal bar at the bottom of a screen that is used to move the screen’s content up and down or left and right.</p>

Table 4-1. Navigation Features (continued)

FEATURE	EXAMPLE	DEFINITION
Icon		An icon is an image or symbol that can represent a file or function.
Pop-up window		A pop-up window is a small window that appears on top of the existing screen or window when the user clicks on a link or button. Pop-up windows are used to display information or links. One method to close a pop-up window is to click on the X in the upper right corner of the pop-up window.
Secondary navigation menu		A secondary navigation menu is a menu that contains options relevant to the selected tab or screen.

4. Introduction to the Sharesource Platform

Table 4-1. Navigation Features (continued)

FEATURE	EXAMPLE	DEFINITION
Fly-out calendar		<p>When you hover over the Treatment Summary option in the secondary navigation menu, a calendar appears.</p> <p>With the calendar, you can:</p> <ul style="list-style-type: none"> ■ Click a flag or Treatment Completed icon on a day to view a patient's Treatment Summary for the selected day ■ Use the arrows on the top of the calendar to navigate up to 3 months before the current month

4.6 Baxter Technical Support

For technical support regarding the **Sharesource** platform, contact your local Baxter representative. Contact details are located in the Contact Us link in the footer of the website.

Support for your computer should be directed to your IT administrator.

4.7 Baxter Clinical Support

For clinical support, contact your local clinical consultant.

5

Logging In and Logging Out

5.1 Overview

This section describes how to log in and out of the **Sharesource** portal, reset a password, and update account settings.

5.2 Logging In

To log into the **Sharesource** portal, you must first have an account set-up by a Clinic or Company Administrator. Once the account has been set-up, you will receive an automatically generated email from the **Sharesource** portal with an activation link. Click this link to activate your account.

The activation link will route you to the **Sharesource** portal where you can setup your password, setup your secondary authentication (if applicable), accept Terms and Conditions and the Privacy Policy, and set-up a security question. Setting up security question will allow you to use the Forgot Password link on the login page for verification to reset your password. When you successfully complete these steps, you will be logged into the **Sharesource** portal.

- **NOTE:** Each user should have a unique email address and password. Never share usernames or passwords or leave them where they can be seen by others. Lock them in a safe place or keep them in a password-protected document.
- **NOTE:** Use only a single browser window to access the **Sharesource** portal. Do not log in from multiple computers at the same time.
- **NOTE:** For security reasons, the user should always completely log out of the **Sharesource** portal after they're finished using it.

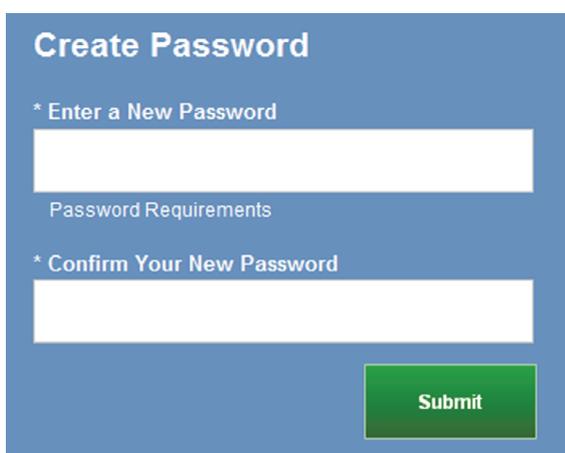
5. Logging In and Logging Out

5.2.1 Initial Login

To log in for the first time and create a new password:

1. Access your account activation email and click on the account activation link. The Create Password screen will appear.

➤ **NOTE:** The activation link is only active for 10 days, be sure to complete your account set-up during this time. The activation link is unique to you and should not be forwarded to other users.



2. Enter a new password.
Passwords must:
 - Have a minimum of 8 alphanumeric characters
 - Have at least 1 numeric character, 1 lower case alphabet character and 1 upper case alphabet character
 - Cannot contain first name, last name or a part of the user name
 - Cannot be the same as the last 4 passwords
3. Confirm the password and click **Submit**.
4. The Terms and Conditions will appear. Please read the site's Terms and Conditions.
5. Check the box and click **Submit**.
6. Select security question and enter the answer.
7. Click **Submit**.
The user's home page will appear.

➤ **NOTE:** Users must change their passwords every 365 days.

5.2.2 Returning User Login

To log in as a returning user:

1. Depending on your region, go to the **Sharesource** portal login screen. Refer to [Table 5-1](#) to see the website for your dialysis center's region.

Table 5-1. Regions and Websites

REGION	Website
Asia Pacific	https://apac.sharesource.com (South Korea) https://kr.sharesource.com
Canada	https://ca.sharesource.com
China	https://sharesource.cn
Europe	https://eu.sharesource.com
Latin America	https://la.sharesource.com
North America (United States)	https://na.sharesource.com

2. Enter your email address.
3. Enter your password.
4. Click **Login**.

5.2.3 If You Forget Your Password

To establish a new password:

1. Click **Forgot Password** on the Login screen.

5. Logging In and Logging Out



The Forgot Password screen will appear.

2. Enter your email address.
3. Click **Submit**.
4. Check your registered email account inbox for a password reset link.
5. Click on the password reset link in the email.

A message will appear asking you to enter response to the security question you established for your account.

6. Answer the security question and click **Submit**.
7. Enter a new password.
8. Enter the new password again to confirm.
9. Click **Submit**.

A message will appear stating that the new password has been saved.

The **Sharesource** portal will send a message to your email address on file to inform you that your account password was changed.

5.3 Logging Out

For security reasons, it is important to completely log out of the **Sharesource** portal after you are finished using it.

➤ **NOTE:** The **Sharesource** portal will automatically log out after 30 minutes of inactivity.

To log out of the portal:

1. Find your name at the upper right corner of the screen.
2. Click **Logout**.



5.4 Updating Your Account Settings

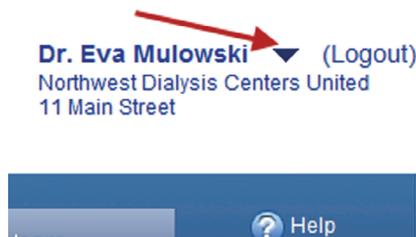
The **Sharesource** portal lets users update the following account settings:

- Name
- Password
- Email address
- Security question
- Language
- Primary clinic
- Email preferences

All these changes are made at the Account Settings screen.

To access your Account Settings:

1. Click the drop-down arrow near your name:



2. When the drop-down menu opens, click **Account Settings**.



The Account Settings screen will appear.

Account Information

Name: Dr. Mulowski, Eva
[Change Name](#)

Password: [Change Password](#)

Email Address: clinicuser01@gmail.com
[Change Email Address](#)

Security Questions: [Change Security Questions](#)

Account Preferences

Language: English (American) - English (American)

Primary Clinic:

Email Preferences: [Edit Preferences](#)

Site Access

Clinic Name	Clinic ID	Address	Role
Northwest Dialysis Centers United	08503-NDCU-0010	11 Main Street Philadelphia IL - Illinois 60000 United States	Basic Clinical Access Homechoice Claria Clinical Settings Manager Homechoice Claria Device Manager Patient Manager Clinic User Manager

Record 1-1 of 1

- At the Account Settings screen, click a link to change a setting for your account.

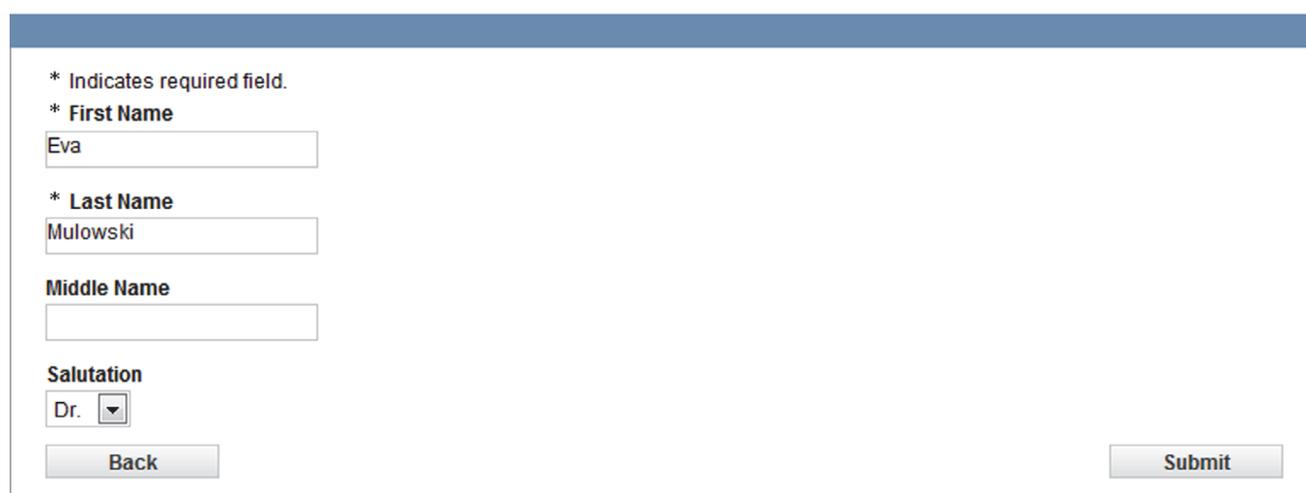
5. Logging In and Logging Out

5.4.1 Changing Your Name

To change your name:

1. Open the drop-down menu by clicking the arrow near your name in the upper right corner of the screen.
2. Click **Account Settings**.
The Account Settings screen will appear.
3. At the Account Settings screen, click **Change Name**.
The Change Name screen will appear.

Change Name



The screenshot shows a web form titled "Change Name". At the top left, there is a note: "* Indicates required field." Below this, there are four input fields: "First Name" with the value "Eva", "Last Name" with the value "Mulowski", "Middle Name" (empty), and "Salutation" with a dropdown menu showing "Dr.". At the bottom left is a "Back" button and at the bottom right is a "Submit" button.

4. Type in the new first and last names. These are required fields.
5. Enter a middle name if you choose. This step is optional.
6. From the Salutation drop-down list, you can select an optional salutation.
7. Click **Submit**.
A message will appear stating that the update was successfully submitted.

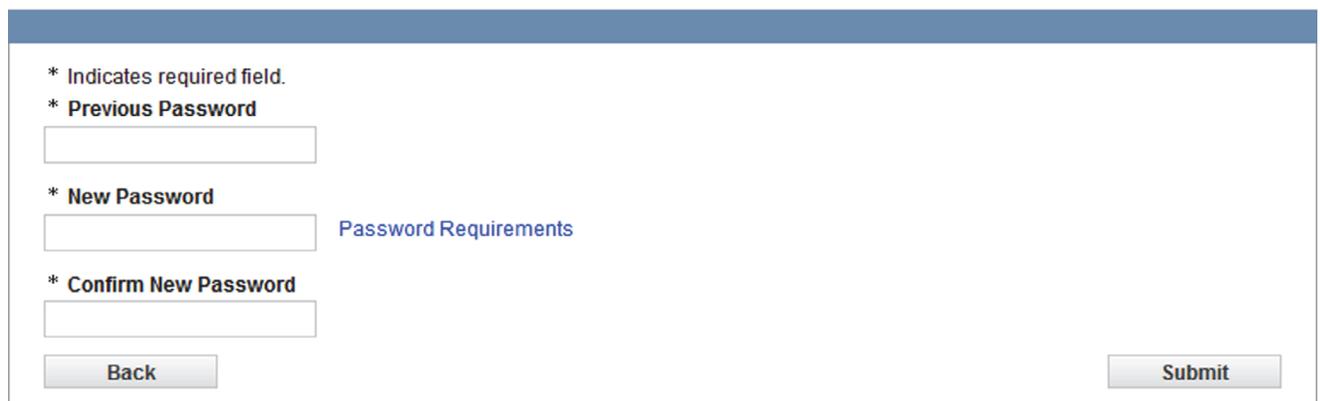
5.4.2 Changing Your Password

For security reasons, it is a good idea to periodically change your password.

To change your password:

1. Open the drop-down menu by clicking the arrow near your name in the upper right corner of the screen.
2. Click **Account Settings**.
The Account Settings screen will appear.
3. At the Account Settings screen, click **Change Password**.
The Change Password screen appears.

Change Password



* Indicates required field.

* **Previous Password**

* **New Password** [Password Requirements](#)

* **Confirm New Password**

4. Enter your old password.
5. Enter a new password.
6. Retype the new password to confirm.
7. Click **Submit**.

A message will appear stating that the new password has been saved.

The **Sharesource** portal will send a message to your email address on file to inform you that your account password was changed.

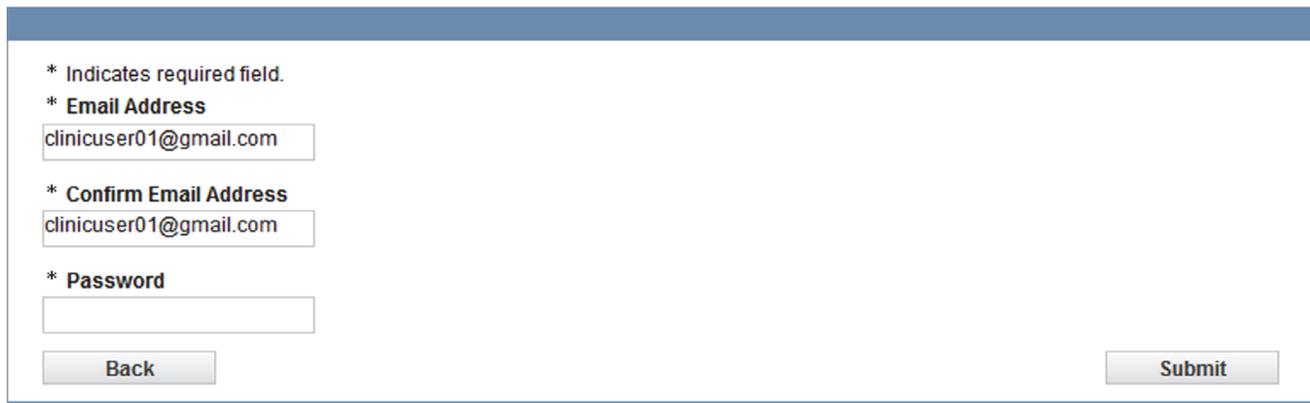
5. Logging In and Logging Out

5.4.3 Changing Your Email Address (Username)

To change your email address (username):

1. Open the drop-down menu by clicking the arrow near your name in the upper right corner of the screen.
2. Click **Account Settings**.
The Account Settings screen will appear.
3. At the Account Settings screen, click **Change Email Address**.
The Change Email Address (Username) screen will appear.

Change Email Address (Username)



The screenshot shows a web form titled "Change Email Address (Username)". At the top left, there is a note: "* Indicates required field." Below this, there are three input fields, each with an asterisk and a label: "* Email Address", "* Confirm Email Address", and "* Password". The "Email Address" and "Confirm Email Address" fields both contain the text "clinicuser01@gmail.com". The "Password" field is empty. At the bottom left of the form is a "Back" button, and at the bottom right is a "Submit" button.

4. Type in the new email address.
5. Confirm the email address.
6. Enter your password.
7. Click **Submit**.

A message will appear stating that the update was successfully submitted.

The **Sharesource** portal will send a message to your email address on file to inform you that your email address was changed.

5.4.4 Changing Your Security Question

To change your security question:

1. Open the drop-down menu by clicking the arrow near your name in the upper right corner of the screen.
2. Click **Account Settings**.
The Account Settings screen will appear.
3. At the Account Settings screen, click **Change Security Question**.
The Edit Security Question screen will appear.
4. Select a question and provide an answer in the Answer to your Security Question field.
5. Enter your password in the Password field.
6. Click **Submit**.
A message will appear stating that the update was successfully submitted.

5.4.5 Changing Your Language, Primary Clinic, or Email Preferences

To change your language, primary clinic, or email preferences:

1. Open the drop-down menu by clicking the arrow near your name in the upper right corner of the screen.
2. Click **Account Settings**.
The Account Settings screen will appear.
3. At the Account Settings screen, click **Edit Preferences**.
The Edit Preferences screen will appear.

5. Logging In and Logging Out

Edit Preferences

* Indicates required field.

* **Language**

English (American) - English (American) ▼

* **Primary Clinic**

Northwest Dialysis Centers United ▼

* **Email Preferences**

Daily Digest ▼

4. Do any of the following:
 - If you are changing your language, select your preferred language from the drop-down list
 - If you are changing your primary clinic, select your primary clinic from the drop-down list
 - If you are changing your email preference, select your email preference from the drop-down list
5. Click **Submit**.

A message will appear stating that the update was successfully submitted.

5.5 Resetting a User's Password

After 5 unsuccessful attempts to log in, a user's account locks and the user can no longer log in using their existing password. A Clinic Administrator with Clinic User Manager access permissions must unlock the user's account which will generate an email to the user with a link to set-up a new password.

To reset a user's password:

1. Click the **Users** tab on the **Sharesource** portal home page.

The Clinic Users secondary navigation menu will open.

Clinical	Reports	Clinic Settings	Patient Administration	Users	Help
Clinic Users					
User List					
User Search					
Add User					
Email Address (Username)	Name	Role	Status	Actions	
clinicuser01@gmail.com	Mulowski, Eva	Basic Clinical Access Homechoice Claria Device Manager Homechoice Claria Clinical Settings Manager Clinic User Manager Patient Manager	Active	Edit Reset Password	
clinicuser02@gmail.com	Rivera, Noah	Basic Clinical Access Homechoice Claria Clinical Settings Manager	Active	Edit Reset Password	
clinicuser03@gmail.com	Nylund, Sophie	Basic Clinical Access Clinic User Manager	Active	Edit Reset Password	
clinicuser04@gmail.com	Davis, Adam	Clinic User Manager Patient Manager	Active	Edit Reset Password	
clinicuser05@gmail.com	Watson, Sarah	Basic Clinical Access Homechoice Claria Device Manager Homechoice Claria Clinical Settings Manager	Active	Edit Reset Password	
Records 1-5 of 5					

2. Click **User List**.
3. Locate the user who has the locked account.

Status will be given as "Locked."

4. Click **Reset Password** in the Actions column.

A message will appear stating that the user's password will be reset.

5. Accept the message to reset the user's password.

You will receive an email containing a link to reset the password. Click on the link and follow the instructions to set-up a new password.

5.6 To Log In After Password Is Reset

After an administrator who has Clinic User Manager access resets your password, you will receive a password reset link on the registered email ID. Click on the link and follow the instruction to set a new password.

To log in after password is reset:

1. Check your registered email account inbox for a temporary password reset link.
2. Click on the password reset link in the email and the new password screen will appear.
3. Enter a new password.
4. Confirm the new password.
5. Click **Submit**.

A message will appear stating that the new password has been saved.

The **Sharesource** portal will send a message to your email address on file to inform you that your account password was changed.

6

Treatment Dashboard

6.1 Overview

This section describes the Treatment Dashboard (“the Dashboard”) as well as:

- The information the Patient Event icons provide
- How to access a Patient Snapshot
- How to access Device Settings
- How to view the Treatment Summary

6.2 Treatment Dashboard Function

The Treatment Dashboard provides an overview of patients’ treatment history at a high level for the selected dialysis center. At the Treatment Dashboard, users can filter which patients will appear. However, they will only be able to see the patients that they are authorized to view.

By default, the Treatment Dashboard displays Patient Event icons for the previous seven days. Only patients treated in the last 28 days from a device connected to the **Sharesource** platform will appear on the Dashboard. View additional days (for a total of 28) by clicking the arrows to the right or left of the date range.

Patient Event icons appear on the Treatment Dashboard to notify you of treatment information and events that occurred during a patient’s treatment. You can click on the Legend link, located at the top of the list of patients, to see the names of each icon. See [Table 2-1](#) in this guide for an explanation of the Patient Event icons.

The Patient Event icons show the following information:

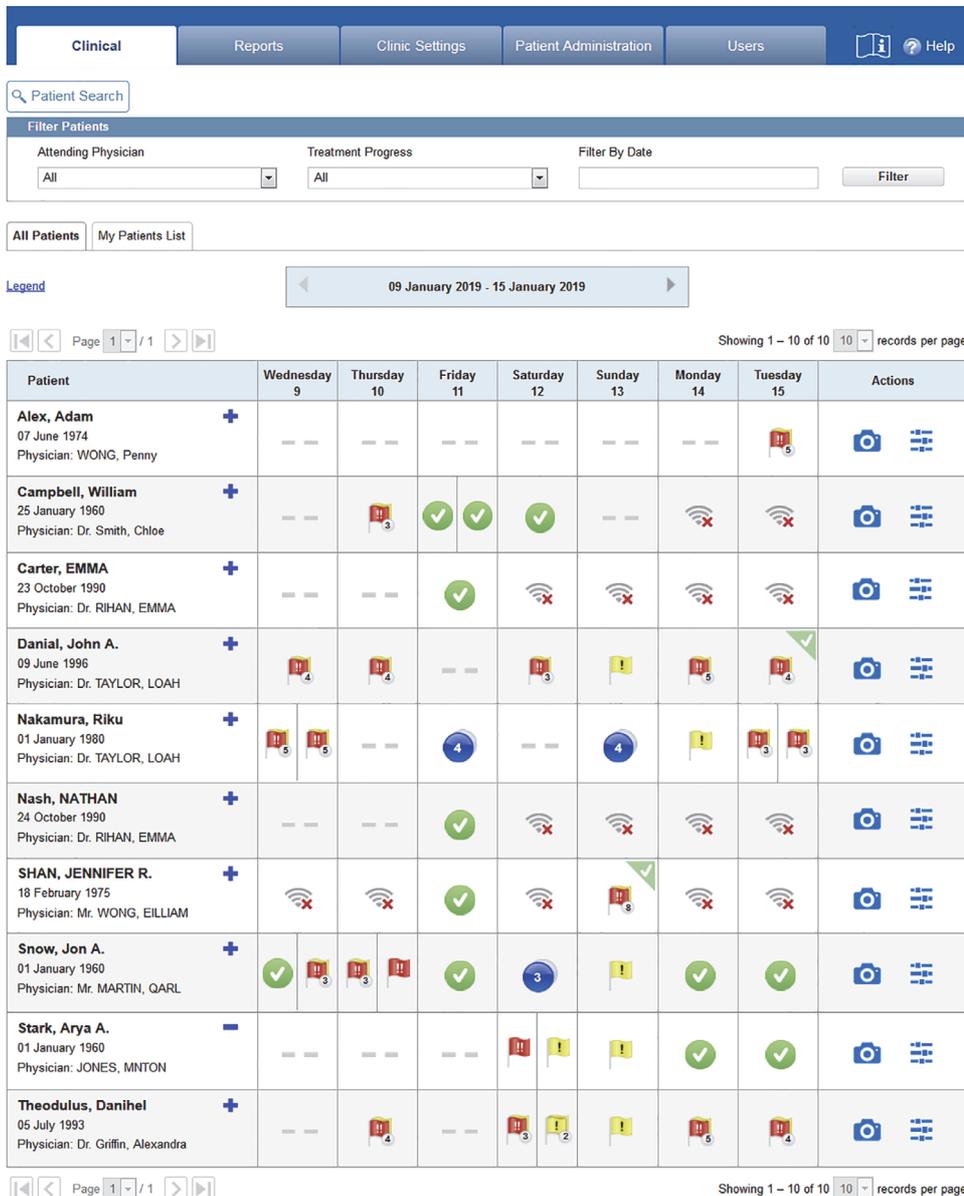
- Treatment was completed without any flag events occurring
- Treatment had at least one high priority flag occur
- Treatment had at least one priority flag occur
- No treatment data was received
- No communication occurred between the cyclor and the dialysis center
- Three or more treatments occurred on the same day
- Treatment was reviewed by an authorized user

6.3 Viewing the Treatment Dashboard

The Treatment Dashboard, shown below, is the first screen you see after logging into the **Sharesource** portal. To return to the Treatment Dashboard from any screen, click the **Clinical** tab located at the top of the display or Return to Dashboard in the secondary navigation menu.

The Treatment Dashboard will only show the patients that you are authorized to view. You can view descriptions of the Patient Event icons by hovering over the icon with your mouse. To view detailed information about a specific patient's treatment on a specific day, click the flag or Treatment Completed icon on that day to view that patient's Treatment Summary.

In addition, you can quickly access a patient's Patient Snapshot and Device Settings from the Treatment Dashboard by clicking the Patient Snapshot icon  or by clicking the Device Settings icon . Both of these icons are found in the Actions column.



The screenshot displays the Sharesource Treatment Dashboard interface. At the top, there is a navigation bar with tabs for Clinical, Reports, Clinic Settings, Patient Administration, and Users, along with a Help icon. Below this is a Patient Search field and a Filter Patients section with dropdown menus for Attending Physician (set to All), Treatment Progress (set to All), and Filter By Date. There are also buttons for All Patients and My Patients List.

The main content area features a calendar view for the period 09 January 2019 - 15 January 2019. The calendar grid shows treatment events for ten patients. Each patient's row includes their name, birth date, and physician, followed by a grid of days from Wednesday to Tuesday. Icons in the grid represent treatment events: green checkmarks for completed treatments, red exclamation marks for alerts, and blue circles with numbers for other events. The Actions column for each patient contains icons for Patient Snapshot and Device Settings.

Patient	Wednesday 9	Thursday 10	Friday 11	Saturday 12	Sunday 13	Monday 14	Tuesday 15	Actions
Alex, Adam 07 June 1974 Physician: WONG, Penny	--	--	--	--	--	--		
Campbell, William 25 January 1960 Physician: Dr. Smith, Chloe	--					--		
Carter, EMMA 23 October 1990 Physician: Dr. RIHAN, EMMA	--	--						
Danial, John A. 09 June 1996 Physician: Dr. TAYLOR, LOAH			--					
Nakamura, Riku 01 January 1980 Physician: Dr. TAYLOR, LOAH				--				
Nash, NATHAN 24 October 1990 Physician: Dr. RIHAN, EMMA	--	--						
SHAN, JENNIFER R. 18 February 1975 Physician: Mr. WONG, EILLIAM								
Snow, Jon A. 01 January 1960 Physician: Mr. MARTIN, QARL								
Stark, Arya A. 01 January 1960 Physician: JONES, MNTON	--	--	--					
Theodulus, Danihel 05 July 1993 Physician: Dr. Griffin, Alexandra	--		--					

6.3.1 Patient List Filters

Clinicians can control which patients the Treatment Dashboard displays by using the Filter tool located at the top of the screen.

The screenshot shows the 'Filter Patients' interface. It has three main filter sections: 'Attending Physician' with a dropdown menu showing 'Dr. Bernard, Michael', 'Treatment Progress' with a dropdown menu showing 'High Priority Flag', and 'Filter By Date' with a text input field showing '31 January 2019'. To the right of these fields is a 'Filter' button. Below the filter fields is a link that says 'Clear ALL Filters'.

To filter a patient list:

1. Open the Attending Physician drop-down list.
Select a physician and click the **Filter** button to display all patients associated with that physician.
2. Open the Treatment Progress drop-down list to filter the Treatment Dashboard by selecting an item from the drop-down list and clicking the **Filter** button to display all patients associated with your selection. The Treatment Progress drop-down contains the following items:
 - All
 - High Priority Flag
 - Priority Flag
 - Treatment Completed
 - No Treatment Data
 - Treatments Not Reviewed
 - No Communication
3. Click Filter By Date and a calendar will appear. Click a date in the calendar and click the **Filter** button. The selected date will be highlighted in the Dashboard.

The screenshot shows the 'Filter By Date' interface. It features a calendar for 'January 2019'. The date '31' is highlighted in yellow. To the right of the calendar is a 'Filter' button. Below the calendar, there is a dropdown menu showing 'of 12' and '10 records per page'. At the bottom right, there is an 'Actions' button.

4. To reset the filters, click the Clear ALL filters link.

6.4 Viewing the Patient Snapshot

The Patient Snapshot provides an overview of the patient's treatment. It provides data on:

- Total UF
- Pre-Treatment Weight
- Pre-Treatment Blood Pressure

Data is displayed both numerically and graphically.

- Hover your mouse over a bar or data point in a graph to display numerical data

To view the Patient Snapshot and treatment data:

1. Click the **Clinical** tab.

A list of all patients associated with your dialysis center that have received treatment within the past 28 days will appear.

2. Click the Patient Snapshot icon  in the Actions column to display the Patient Snapshot.

– OR –

1. Click the Patient Search button on the Treatment Dashboard.

2. Click the Patient Snapshot icon  in the Actions column to display the Patient Snapshot.

The Patient Snapshot will appear.

3. Click the Select Timeframe drop-down list and select one of the following:

- 7 Days
- 30 Days

– OR –

- Click the left and right arrows in the date bar to move backwards and forwards through the weeks

4. Click the Legend link for the names of the treatment icons.

5. To view the Snapshot for the patient listed before the selected patient, hover the mouse over the Previous Patient link. To view the Snapshot for the patient listed after the selected patient, hover the mouse over the Next Patient link.

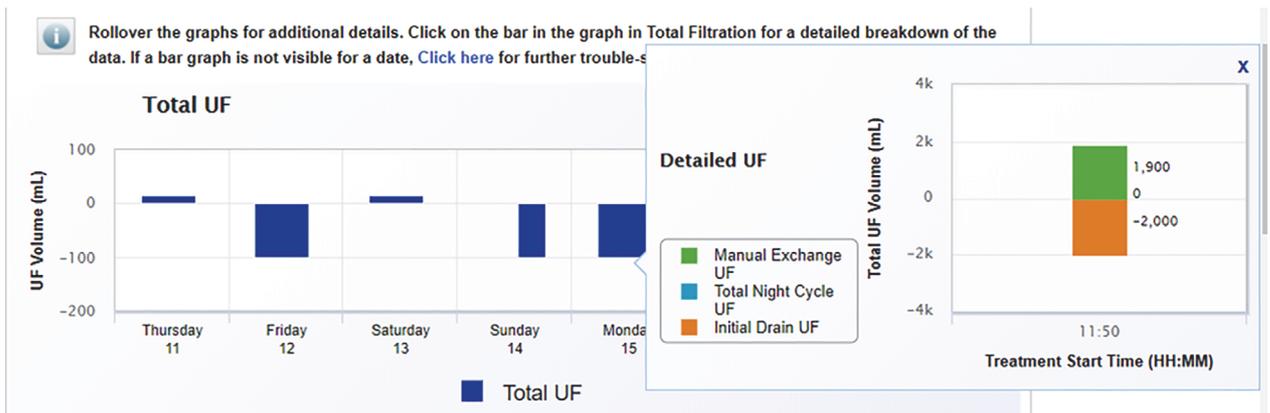
➤ **NOTE:** Hover the mouse over the Previous Patient or Next Patient links, and a list of the next or previous 10 patient names will appear. The patient names display in the same order as they appear in the Treatment Dashboard.

- To zoom in on a portion of the Total UF chart or Weight chart, click and drag to highlight the area to be magnified.

To restore the Total UF chart or Weight chart to normal view, click the **Reset Zoom** button located in the upper-right hand corner of the chart.

- Hover the mouse over a bar in the Total UF chart for additional details.

Click on any bar in the chart to view the total UF breakdown for the day:



6.4.1 Total UF Description

Total UF consists of ultrafiltration from the following sources:

- Day/Manual UF:
 - UF entered into the cyclor from manual exchange
 - UF recorded by the cyclor during day cycles (Hi-Dose)
 - UF recorded by the cyclor from initial drain using the previous last fill volume
 - **NOTE:** This initial drain UF may not reflect an accurate UF value if a manual drain or manual exchange was not entered into the cyclor.
- Night UF:
 - UF recorded by the cyclor during night cycles

6. Treatment Dashboard

Clinical
Reports
Clinic Settings
Patient Administration
Users
Help

Actions

- Return to Dashboard
- Claria Patient Snapshot
- Claria Treatment Summary
- Claria Device Settings
- Claria Analytics

<< Previous Patient
Next Patient >>

Campbell, William

Date of Birth: 01 February 1989

Attending Physician: Dr. Smith, Chloe

Clinic Patient ID: 1233456789

Baxter Patient ID: 8123-08383-O-08503-100053

Homechoice Claria

Select Timeframe: 7 Days Legend

11 June 2020 - 17 June 2020

Thursday 11

Friday 12

Saturday 13

Sunday 14

Monday 15

Tuesday 16

Wednesday 17

Treatment Data	Thursday 11	Friday 12	Saturday 13	Sunday 14	Monday 15	Tuesday 16	Wednesday 17
Program Name	DP1	DP1	DP1	DP1	DP1	---	---
Total UF (mL)	15	-100	15	-100	-100	---	---
Manual Exchange UF (mL)	2,000	3,900	6,000	1,900	1,900	---	---
Initial Drain UF (mL)	-1,985	-4,000	-5,985	-2,000	-2,000	---	---
Day Cycle UF (mL)	---	---	---	---	---	---	---
Total Night Cycle UF (mL)	0	0	0	0	0	---	---
Pre-Weight (kg)	62.0	62.0	62.0	62.0	62.0	---	---
Pre-Blood Pressure (mmHg)	140/80	140/80	140/80	140/80	140/80	---	---

Rollover the graphs for additional details. Click on the bar in the graph in Total Filtration for a detailed breakdown of the data. If a bar graph is not visible for a date, [Click here](#) for further trouble-shooting tips.

Total UF

Weight

Blood Pressure

6-6

Sharesource Connectivity Platform User Guide for Use with the Homechoice Claria APD System

07-19-73-157J1

6.5 Viewing the Treatment Summary

The Treatment Summary contains information about all applicable flag symbols, their descriptions, and the treatment data for the day you select. Some of the primary information includes:

- Treatment Start Date and Start Time
- Flag Symbols and their descriptions (if any)
- Events (if any)
 - Events are defined as recorded **Homechoice Claria** APD system cyclers alarms.
- Solutions, Vitals, Total Therapy UF
- Prescribed Device Program Settings - Program Name
- Actual Therapy Details (For e.g an icon next to the Initial Drain entry to indicate that Initial Drain Bypass option is enabled during a patient's treatment).
- Cycle Profiles - A description of the items in the Cycle Profile chart's legend follows:
 - **User Actions** - Refers to actions a user has taken on the device during treatment therapy (For e.g Initial drain bypass, Initial drain stopped, Initial drain resumed, Patient empty (Yes), Patient empty (No), Manual drain, Bypass).
 - **System Errors** - Refers to an error encountered by the device during treatment therapy.
 - **System Events** - Refers to events reported in the Events table on the treatment summary screen during treatment therapy.

► **NOTE:** The Cycle Profile chart provides a visual representation of therapy cycles and it is not always possible to display other events which occurred in close proximity. For User Actions and System Events occurring at the same time as System Errors, **Sharesource** will prioritize displaying System Errors on the Cycle Profile chart.

The Event table in the Treatment Summary Screen should be used as the source for detailed information of all events occurring during therapy.

Refer to the list in the table below for User Actions, System Errors, and System Events shown on the Cycle Profile chart.

- Manual Exchange Information (if any)
- Device Program Details (For e.g an entry for Initial Drain Bypass which indicates if the Initial Drain Bypass option is enabled during a patient's treatment).
- Device Program Tidal Settings (if any)
- Device Data

► **NOTE:** Click the PDF icon  to generate a PDF version of the Treatment Summary.

6. Treatment Dashboard

Table 6-1. List of annotations available for Cycle Profile Chart

CONDITION NAME	TYPE	ERROR NUMBER	EVENT TEXT
Manual Drain	UI Event	N/A	Manual drain
Bypass	UI Event	N/A	Bypass
Initial drain Bypassed	UI Event	N/A	Initial drain Bypass
Initial drain stopped	UI Event	N/A	Initial drain stopped
Initial drain resumed	UI Event	N/A	Initial drain resumed
Patient answers YES to “Are you empty?” question + clicks Go button on the device	UI Event	N/A	Patient Empty (Yes)
Patient answers NO to “Are you empty?” question + clicks Go button on the device	UI Event	N/A	Patient Empty (No)
Patient answers NO to “Are you empty?” question + clicks Stop button on the device	UI Event	N/A	Patient Empty (No)
CHECK FINAL LINE	System Alert	Therapy Error #3	Check final line
SLOW FLOW DRAIN	System Alert	Therapy Error #7	Slow flow drain
SLOW FLOW PATIENT	System Alert	Therapy Error #9	Slow flow patient
CHECK YOUR POSITION	System Alert	Therapy Error #13	Check your position
FILL NOT FINISHED	System Alert	Therapy Error #14	Fill not finished
DRAIN NOT FINISHED	System Alert	Therapy Error #16	Drain not finished
WARNING: NEGATIVE UF	System Alert	Therapy Error #17	Warning: negative UF
LOW DRAIN VOLUME	System Alert	Therapy Error #18	Low drain volume
CHECK LINES AND BAGS	System Alert	Therapy Error #19	Check lines and bags
WARMING SOLUTION	System Alert	Therapy Error #21	Warming solution
LOW UF	System Alert	Therapy Error #22	Low UF
SLOW FLOW HEATER	System Alert	Therapy Error #23	Slow flow heater
SLOW FLOW SUPPLY	System Alert	Therapy Error #24	Slow flow supply
WARNING: POSITIVE UF	System Alert	Therapy Error #25	Warning: positive UF
HIGH DRAIN XYY	System Alert	Therapy Error XYY X = 0 (Day Drain), 1 (Night Drain), 2 (Manual Drain); YY = Current cycle number or manual drain count	High drain XYY *Only Display for Night Drain
SYSTEM ERROR	System Error	XXXX where XXXX is a 4 digit number.	System Error (XXXX)

To view the Treatment Summary:

1. The Treatment Summary can be accessed through the calendar function on the Treatment Dashboard or the Patient Snapshot. Through either of these screens, select the patient and the day for which you wish to view that patient's Treatment Summary.
2. Click on the patient's Patient Event icon for the selected day on the calendar.
The Treatment Summary screen will appear.
3. To view the patient's Treatment Summary for the day before the selected day, click the Previous Treatment link.
4. To view the patient's Treatment Summary for the day after the selected day, click the Next Treatment link.
5. To view the Treatment Summary for the patient listed before the selected patient, hover the mouse over the Previous Patient link. To view the Snapshot for the patient listed after the selected patient, hover the mouse over the Next Patient link.

➤ **NOTE:** A patient's name will not be selectable if that patient did not have a treatment.

6. Click the arrow in a header to expand the section to view information. Click the arrow again to collapse that section.
7. To zoom in on a portion of the Cycle Profile chart, click and drag to highlight the area to be magnified.
To restore the Cycle Profile chart to normal view, click the **Reset Zoom** button located in the upper-right hand corner of the chart.

➤ **NOTE:** For the Events that happen close together, use the zoom feature. It is recommended to refer to the Events table for the specific time and events during treatment.

8. To mark the treatment as reviewed, click the **Treatment Reviewed** button.

6. Treatment Dashboard

Clinical
Reports Clinic Settings Patient Administration Users

<< Previous Patient
Next Patient >>

Campbell, William

Date of Birth: 25 January 1960 Clinic Patient ID: 122345689

Attending Physician: Dr. Smith, Chloe

Baxter Patient ID: ST123-O-08503-1000035

Homechoice Claria

[Click here to generate a PDF file.](#)

Previous Treatment
10 January 2019, 20:55
Next Treatment

Fill/Dwell Bypass Count: 3

Lost Treatment Time: 118 minutes

Lost Dwell Time: 116 minutes

Events(0)

This treatment does not contain events.

Solutions, Vitals, Total Therapy UF

Homechoice Claria Solution Concentrations		Day Therapy UF	
Night Concentration 1	Not Surveyed	Initial Drain UF	---
Night Concentration 2	Not Surveyed	Total Day UF	---
Last Fill Concentration	Not Surveyed	Night Therapy UF	
		Total Night Cycle UF	925 mL
		Total Reported Therapy UF	
		Total UF	---

Data Type	Pre-Treatment
Weight	Not Surveyed
Blood Pressure	Not Surveyed

UF reported is based on cyclers recorded and manually entered data. The Clinician should ensure any unreported UF data is accounted for.

Prescribed Device Program Settings - Device Program Name: DPA1

Therapy Mode/Time(HH-MM)	Number of Cycles	Fill Volume (mL)	Fill Time (H:MM)	Dwell Time (H:MM)	Drain Time (H:MM)	Drain Volume (mL)	UF/Cycle (mL)
Standard Mode/10:00	5	2,000	---	1:34	---	---	---

Actual Therapy Details

Time Stamp (HH:MM:SS)	Cycle	Fill Volume (mL)	Fill Time (H:MM)	Dwell Time (H:MM)	Drain Time (H:MM)	Drain Volume (mL)	UF/Cycle (mL)
20:55:56	Initial Drain	---	---	---	0:04	212	---
21:00:45	Night Cycle 1	1,999	0:08	1:33	0:14	2,353	362
22:57:48	Night Cycle 2	2,000	0:08	1:34	0:17	2,180	182
00:59:00	Night Cycle 3	1,999	0:08	1:04	0:13	2,046	52
02:25:27	Night Cycle 4	2,000	0:07	1:15	0:13	2,252	255
04:02:01	Night Cycle 5	2,000	0:08	0:29	0:17	2,069	72
04:57:29	Last Fill	200	0:01	---	---	---	---

Cycler Total							
08:02	---	10,016	0:42	5:57	1:21	10,941	925

Cycle Profiles

For the Events that happen close together, use the zoom feature. It's recommended to refer to Events table above for specific details on time and events during treatment.

◆ User Actions
 ■ System Errors
 ● System Events

This treatment does not contain manual exchanges.

› Device Program Details

› Device Data

To mark this treatment as reviewed click the Treatment Reviewed button on the right.
Treatment Reviewed

6-10

Sharesource Connectivity Platform User Guide for Use with the Homechoice Claria APD System

07-19-73-157J1

6.6 Patient Search

Only patients who have been treated on a cyclor connected to the **Sharesource** connectivity platform will appear on the Treatment Dashboard.

New patients who do not have a cyclor programmed via the **Sharesource** platform or other patients that your dialysis center manages will not show up.

To search for patients not listed on the Treatment Dashboard:

1. Click the Patient Search button on the Treatment Dashboard.

The screenshot shows the top navigation bar with tabs for Clinical, Reports, Clinic Settings, Patient Administration, and Users. Below this is a 'Filter Patients' section with a 'Patient Search' button highlighted by a red box. Below the search button are dropdown menus for 'Attending Physician' (set to 'All'), 'Treatment Progress' (set to 'All'), and a 'Filter By Date' field. At the bottom of this section are buttons for 'All Patients' and 'My Patients List'.

2. A list of patients registered at the dialysis center who have been or are currently connected to the **Sharesource** platform will appear.

The screenshot shows the search results table with the following columns: Patient Name, Date of Birth, Baxter Patient ID, Attending Physician, and Actions. The table contains 10 rows of patient data.

Patient Name	Date of Birth	Baxter Patient ID	Attending Physician	Actions
CAMPBELL, NOAH O.	28 February 1999	ST123-10010015	Dr. WONG, ELLIAM	Program New Device
CAMPBELL, NOAH O.	18 February 1980	ST123-10010187	Dr. RHAN, EMMA	Program New Device
CAMPBELL, NOAH O.	18 September 1976	ST123-10010230	Dr. MARTIN, GAREL	Program New Device
CAMPBELL, OLIVIA M.	10 February 2009	ST123-10010111	Dr. RHAN, EMMA	Program New Device
CAMPBELL, RICH O.	18 September 1976	ST123-10010305	Dr. WONG, ELLIAM	Program New Device
Campbell, William	25 January 1960	ST123-O-08503...	Dr. Smith, Chloe	Program New Device
CAMPBELL, WILLIAM O.	18 February 1975	ST123-10010312	Dr. WILLIAMS, ALEXANDER	Program New Device
Catex, EMMA	23 October 1990	1001-67097	Dr. RHAN, EMMA	Program New Device
Catex, Glen	26 October 1990	1001-67106	Dr. RHAN, EMMA	Program New Device
Catex, Mario	12 August 1986	ST123-10017038	Dr. RHAN, EMMA	Program New Device

3. If the patient you are searching for does not appear, type all or part of the patient name into the Patient Name field, select the other search criteria, and click the **Search** button.

6. Treatment Dashboard

A list of all patients that match the criteria will appear.

➤ **NOTE:** All possible patient matches are listed from the search criteria entered into the Patient Name field.

4. Click Program New Device in the Actions column to set up a new device for a patient.

Device Settings and Templates

7.1 Overview

This section describes how the clinician creates, edits, and deletes Device Programs, Patient Settings, and System Settings. In addition, information on applying a device template and deleting a Device Program is provided.

7.2 Device Programs, Patient Settings, and System Settings for the *Homechoice Claria* APD System

Through the **Sharesource** platform, clinicians can program and set parameters on the **Homechoice Claria** APD system for the following group settings:

- Device Program Settings
- Patient Settings
- System Settings

These settings determine how the patient's treatment is delivered by the **Homechoice Claria** APD system.

➤ **NOTE:** Clinicians must carefully review the confirmation screens that display the device parameters.

Clinicians can configure program settings to allow or prevent user adjustment. If user adjustment is allowed, clinicians can either allow adjustment of the setting within the device default limits or restrict user adjustment to within a small range. For more details, see [Section 7.2.2, Locking or Unlocking Settings](#).

7.2.1 Device Program, Patient, and System Settings Parameters

The tables in [Section 7.3, Therapy Types](#), provide a list of Device Program Settings, Patient Settings, and System Settings, their descriptions, and allowable ranges. The Device Settings screen can be accessed by clicking the Device Settings icon  on the Dashboard. The Device Settings screen can also be accessed via the **Homechoice Claria** Device Settings link in the secondary navigation menu on the left side of the Patient Snapshot screen or the Treatment Summary screen. Instructions for creating and adjusting treatment settings are provided in the following sections:

- [Section 7.7.1, Creating or Editing a Device Program](#)
- [Section 7.7.2, Viewing or Editing Patient Settings](#)
- [Section 7.7.3, Viewing or Editing System Settings](#)

WARNING



Ensure that the values you enter match the patient's prescription to avoid adverse events such as incorrect therapy, an IIPV situation, fluid build-up, or dehydration.

7.2.2 Locking or Unlocking Settings

The clinician can grant or deny permission to patients to modify a Device Program on their **Homechoice Claria** APD system by selecting Yes or No from the Program Locked drop-down list. The Program Locked drop-down list is located on the **Settings** tab on the Device Programs Settings screen.

7.2.3 Designating an Active Device Program

There can be up to four different treatments (Device Program Settings) programmed and stored in the **Sharesource** Clinical Portal but the **Homechoice Claria** APD system allows only one Device Program to be active at a time.

This Active Device Program setting will be the only treatment presented to the user when initiating setup. The user can only use the Active Device Program even though alternate programs can be set up by clinicians. Until this active device program is updated again, the device will continue using the existing active device program or its own last manually programmed therapy. Program changes entered manually on the device will not update the Sharesource active device program. The active device program on the Sharesource portal remains unchanged until the clinician updates it.

- **NOTE:** If the only program displayed is the Active Device Program, it cannot be deleted. If there is more than one Device Program present, the Active Device Program cannot be deleted, only edited.

7.3 Therapy Types

Device Programs consist of different settings that make up therapy types. For instructions on how to create or edit a Device Program, see [Section 7.7.1, Creating or Editing a Device Program](#). The sections below describe the therapy types available with the **Homechoice Claria** APD system. The therapy type is specified by selecting Yes or No from the Day Therapy and Tidal drop-down lists found in the Volume and Tidal tabs of the Device Program Settings screen. For example, if a Tidal therapy is required, at the **Volume** tab, select No from the Day Therapy drop-down list and at the **Tidal** tab, select Yes from the Tidal drop-down list. For a summary of these setting combinations, refer to [Table 7-1](#) below.

Table 7-1. Therapy Type Setting Combinations

THERAPY TYPE	DAY THERAPY (VOLUME TAB)		TIDAL (TIDAL TAB)	
	NO	YES	NO	YES
CCPD/IPD	X		X	
Hi-Dose* CCPD		X	X	
Tidal APD	X			X
Hi-Dose* Tidal		X		X

► **NOTE:** *Depending on your location, the term **OptiChoice** (OCPD) may be used as an alternate to the term Hi-Dose. “Hi-Dose” is used throughout this guide to represent this type of 24-hour therapy.

For more information on these setting combinations, refer to the following sections:

- [Section 7.3.1, Continuous Cycling Peritoneal Dialysis/Intermittent Peritoneal Dialysis](#)
- [Section 7.3.2, Hi-Dose* CCPD](#)
- [Section 7.3.3, Tidal APD](#)
- [Section 7.3.4, Hi-Dose* Tidal](#)

7. Device Settings and Templates

7.3.1 Continuous Cycling Peritoneal Dialysis/Intermittent Peritoneal Dialysis

Continuous Cycling Peritoneal Dialysis (CCPD) is a continuous therapy in which a cyler performs night exchanges. The dialysis solution is left in the peritoneal cavity during the daytime, or can be completely drained sometime during the day before initiating the next day's cyler therapy.

Intermittent Peritoneal Dialysis (IPD) is a form of peritoneal dialysis in which dialysis sessions take place two to four times a week, 12 to 20 hours per session. The dialysis solution is drained completely at the end of the session and the peritoneal cavity remains empty between the sessions.

To set the Homechoice Claria APD system for CCPD/IPD therapy:

1. At the **Volume** tab, select No from the Day Therapy drop-down list.
You must specify a value in the Night Fill Volume (mL) field.
2. At the **Tidal** tab, select No from the Tidal drop-down list.

7.3.2 Hi-Dose* CCPD

Hi-Dose CCPD is intended to provide a 24-hour therapy that combines conventional CCPD therapy with with more than one daytime exchange. This may help improve the adequacy of the dialysis treatment.

To set the Homechoice Claria APD system for Hi-Dose CCPD:

1. At the **Volume** tab, select Yes from the Day Therapy drop-down list.
You must specify a value in the Day Fill Volume (mL) field.
You must specify a value in the Number of Day Cycles field.
You must specify a value in the Night Fill Volume (mL) field.
2. At the **Tidal** tab, select No from the Tidal drop-down list.

➤ **NOTE:** *Depending on your location, the term **OptiChoice** (OCPD) may be used as an alternate to the term Hi-Dose. "Hi-Dose" is used throughout this guide to represent this type of 24-hour therapy.

7.3.3 Tidal APD

Tidal Peritoneal Dialysis (TPD), more commonly referred to as “Tidal,” is a form of APD where only a portion of the solution in a patient's peritoneal cavity is drained and filled each cycle.

- **NOTE:** The patient may not receive all of their Night Therapy Volume if the sum of the Night Fill Volume for the first Night Fill and the subsequent Tidal Fill Volumes (percentage of Night Fill Volume) do not add up to the Night Therapy Volume.

To set the Homechoice Claria APD system for Tidal APD:

1. At the **Volume** tab, select No from the Day Therapy drop-down list.
You must specify a value in the Night Fill Volume field.
2. At the **Tidal** tab, select Yes from the Tidal drop-down list.
You must select a value from the Tidal Volume Percent (%) drop-down list.
You must specify a value in the Total Night UF (mL) field.
You must enter a value in the Full Drains Frequency field.

7.3.4 Hi-Dose* Tidal

Hi-Dose Tidal is intended to provide a 24-hour therapy that combines conventional Tidal therapy with more than one daytime exchange. This may help improve the adequacy of the dialysis treatment.

To set the Homechoice Claria APD system for Hi-Dose Tidal:

1. At the **Volume** tab, select Yes from the Day Therapy drop-down list.
You must specify a value in the Day Fill Volume (mL) field.
You must specify a value in the Number of Day Cycles field.
You must specify a value in the Night Fill Volume (mL) field.
2. At the **Tidal** tab, select Yes from the Tidal drop-down list.
You must select a value from the Tidal Volume Percent (%) drop-down list.
You must specify a value in the Total Night UF (mL) field.
You must edit or confirm a value in the Full Drains Frequency field.

- **NOTE:** *Depending on your location, the term **OptiChoice** (OCPD) may be used as an alternate to the term Hi-Dose. “Hi-Dose” is used throughout this guide to represent this type of 24-hour therapy.

7.4 Device Program Settings

Table 7-2. Device Program Settings - Time Tab

SETTING	DESCRIPTION	RANGE
Device Program Name	The name assigned by the dialysis center for the program.	10 characters
Therapy Mode	Determines which Fill Mode is used in the therapy. Standard Fill Mode (Standard Mode) is for patients with Fill volumes over 1,000 mL. Low-Fill Mode is used only for patients with Fill volumes ranging from 60 mL to 1,000 mL.	<ul style="list-style-type: none"> ■ Low-Fill ■ Standard
Night Therapy Time	Length of prescribed treatment in hours and minutes.	<ul style="list-style-type: none"> ■ 10 minutes (0:10) to 48 hours (48:00) in 10 minute increments
Adjust Dwells	Automatically adjusts the Dwell times to complete the treatment in the prescribed therapy time. If this is set to None, therapy Dwell times are not changed.	<ul style="list-style-type: none"> ■ Adjust Dwells Up and Down ■ Adjust Dwells Up Only ■ Adjust Dwells Down Only ■ None

Table 7-3. Device Program Settings - Volume Tab

SETTING	DESCRIPTION	RANGE
Total Volume (mL)	Total amount of solution used for the therapy. Includes the total Fill Volume for all cycles and the Last Fill Volume.	<ul style="list-style-type: none"> ■ 200 mL to 80,000 mL
Day Therapy	Specifies if a Hi-Dose therapy will be used during the day.	<ul style="list-style-type: none"> ■ Yes ■ No
Day Fill Volume (mL)	Amount of solution for each daytime exchange, based on the prescription. Appears only if Day Therapy is set to Yes.	Low-Fill Mode: <ul style="list-style-type: none"> ■ 60 mL to 1,000 mL Standard Mode: <ul style="list-style-type: none"> ■ 100 mL to 3,000 mL
Night Therapy	This indicates that treatment will occur during the night.	<ul style="list-style-type: none"> ■ Yes

Table 7-3. Device Program Settings - Volume Tab (continued)

SETTING	DESCRIPTION	RANGE
Number of Day Cycles	Used to specify the number of cycles per day. Appears only if Day Therapy is set to Yes.	<ul style="list-style-type: none"> ■ 1 - 9 in increments of 1
Day Therapy Volume (mL)	This displays the total amount of solution in milliliters to be used for the day portion of the treatment in Hi-Dose therapies. Appears only if Day Therapy is set to Yes.	<ul style="list-style-type: none"> ■ Determined by multiplying the Day Fill Volume and the Number of Day Cycles
Night Therapy	This indicates that treatment will occur during the night.	<ul style="list-style-type: none"> ■ Yes
Night Fill Volume (mL)	Amount of solution for each nighttime cycle based on the prescription.	Low-Fill Mode: <ul style="list-style-type: none"> ■ 60 mL to 1,000 mL Standard Mode: <ul style="list-style-type: none"> ■ 100 mL to 3,000 mL
Number of Night Cycles	This displays the number of calculated night cycles.	<ul style="list-style-type: none"> ■ This is a calculated value: Night Therapy Volume / Night Fill Volume = Number of Night Cycles
Night Therapy Volume (mL)	Total amount of all the solution to be used for the night portion of the treatment, not including the volume required for priming and for the Last Fill if the patient requires a "wet day."	<ul style="list-style-type: none"> ■ This value is the difference of Total Volume - Day Therapy Volume - Last Fill Volume
Last Fill	The last Fill phase before the end of treatment. The last Fill dialysis solution stays in the peritoneal cavity during the day.	<ul style="list-style-type: none"> ■ Yes ■ No
Same Dextrose	Indicates to the device when the Last Fill solution bag is the same or different from the night therapy solution bags. Appears only if Last Fill is set to Yes.	<ul style="list-style-type: none"> ■ Same ■ Different

7. Device Settings and Templates

Table 7-3. Device Program Settings - Volume Tab (continued)

SETTING	DESCRIPTION	RANGE
Last Fill Volume (mL)	Amount of solution delivered at the end of the therapy and left in the peritoneal cavity during the day. This setting is used for a "wet day." Appears only if Last Fill is set to Yes.	Low-Fill Mode: <ul style="list-style-type: none"> ■ 60 mL to 1,000 mL Standard Mode: <ul style="list-style-type: none"> ■ 100 mL to 3,000 mL

Table 7-4. Device Program Settings - Tidal Tab

SETTING	DESCRIPTION	RANGE
Tidal	Used to specify if Tidal Therapy is to be used.	<ul style="list-style-type: none"> ■ Yes ■ No
Tidal Volume Percent (%)	Portion of solution drained and replaced with new solution during each therapy cycle. This is expressed as a percentage of the Night Fill Volume. Appears only if Tidal is set to Yes.	<ul style="list-style-type: none"> ■ 40% to 95% in increments of 5%
Total Night UF (mL)	Total Night UF expected for the nighttime portion of therapy. The system calculates the UF Per Cycle. The UF Per Cycle plus the Tidal Volume is the amount of solution drained during each Tidal Drain. Appears only if Tidal is set to Yes.	<ul style="list-style-type: none"> ■ 10 mL to 10,000 mL
Full Drains Frequency	The frequency of full Drains during Tidal therapy. Appears only if Tidal is set to Yes.	<ul style="list-style-type: none"> ■ 1 - 10 in increments of 1

Table 7-5. Device Program Settings - Settings Tab

SETTING	DESCRIPTION	RANGE
Target Weight	The Target Weight is used to verify that the programmed Fill volumes do not exceed the maximum allowable settings for the patient's weight.	<ul style="list-style-type: none"> ■ 2 kg to 990 kg

Table 7-5. Device Program Settings - Settings Tab (continued)

SETTING	DESCRIPTION	RANGE
Min Drain Volume(%)	Determines what minimum percent of the Fill Volume is expected to be drained.	Low-Fill Mode: ■ 50% - 125% Standard Mode: ■ 60% - 125%
Min Night Drain Time (minutes)	A Minimum Drain Time must be met before the system can move on to the next Fill. The Min Night Drain Time setting is only available when Low-Fill is selected as the Therapy Mode on the Time tab.	■ 1 - 30 minutes
Initial Drain Volume (mL)	In this field, enter the minimum initial amount of fluid removed from the peritoneal cavity during the Initial Drain phase.	Low-Fill Mode: ■ 0 mL to 1,500 mL Standard Mode: ■ 0 mL to 3,500 mL
Initial Drain Bypass	Used to specify if Initial Drain Bypass is enabled for this patient. Default selected value is Disabled. This option will be available only for supported devices in the standard therapy mode.	■ Enabled ■ Disabled
Initial Drain Time (minutes)	In this field, enter the length of time required to be in the initial drain. The Initial Drain Time setting is not available when Standard is selected as the Therapy Mode on the Time tab.	■ 1 - 30 minutes
Negative UF Limit (%)	The Negative UF Limit triggers an alarm on the cyclor if the patient retains an excessive amount of fluid. The Negative UF Limit (%) setting is only available when Low-Fill is selected as the Therapy Mode on the Time tab.	■ 20% to 60% in increments of 5%

7. Device Settings and Templates

Table 7-5. Device Program Settings - Settings Tab (continued)

SETTING	DESCRIPTION	RANGE
Positive UF Limit	<p>When the Positive UF Limit is set to On, it triggers an alarm on the cyclor if there is excessive ultrafiltration. This could result in dehydration, especially for smaller patients.</p> <p>The Positive UF Limit setting is only available when Low-Fill is selected as the Therapy Mode on the Time tab.</p>	<ul style="list-style-type: none"> ■ On ■ Off
Positive UF Limit Volume (mL)	<p>This sets the volume limit by which the cumulative Drain volumes can exceed the cumulative Fill volumes and an alarm goes off on the cyclor.</p> <p>Appears only when the Positive UF Limit is set to On.</p>	<ul style="list-style-type: none"> ■ 0 mL to 100 mL in increments of 1 ■ 100 mL to 500 mL in increments of 10 ■ 500 mL to 1,000 mL in increments of 50 ■ 1,000 mL to 5,000 mL in increments of 100
Last Fill Manual Drain	<p>Allows another opportunity to drain more fully in the event that insufficient UF volume has been achieved.</p>	<ul style="list-style-type: none"> ■ Yes ■ No
Last Fill Manual Drain Alarm	<p>This setting determines whether a patient's cyclor beeps continuously if the Last Fill Manual Drain UF Target is not met.</p> <p>Only appears if Last Fill Manual Drain is set to Yes.</p>	<ul style="list-style-type: none"> ■ Yes ■ No
Last Fill Manual Drain UF Target (mL)	<p>The programmed minimum amount of UF that will be drained.</p> <p>Only appears if Last Fill Manual Drain is set to Yes.</p>	<ul style="list-style-type: none"> ■ 0 mL to 3,000 mL in increments of 50
Heater Bag Empty	<p>Determines whether a patient's therapy starts with an empty heater bag (Yes) or with solution in the heater bag (No).</p>	<ul style="list-style-type: none"> ■ Yes ■ No
Program Locked	<p>Determines if the patient can modify therapy settings prior to the start of therapy.</p>	<ul style="list-style-type: none"> ■ Yes ■ No

7.5 Patient Settings

Use Patient Settings to enter specific information you want the patient to enter before beginning a treatment and at the end of a treatment.

The parameters to be programmed for Patient Settings as well as the allowable range for each setting are described in [Table 7-6](#) below.

Table 7-6. Patient Settings

SETTING	DESCRIPTION	RANGE
Weight	This indicates when you would like a patient to enter his or her current weight. Select "Pre" if you would like the patient to enter his or her weight during pre-treatment and select "None" if you do not want the patient to enter his or her weight.	<input type="checkbox"/> None <input type="checkbox"/> Pre
Weight Displayed in Tenths	Specifies if you want tenths of a weight unit to be displayed. Appears only if Pre is selected from the Weight dropdown list.	<input type="checkbox"/> No <input type="checkbox"/> Yes
Blood Pressure	This indicates when you would like a patient to enter his or her current blood pressure. Select "Pre" if you would like the patient to enter his or her blood pressure during pre-treatment and select "None" if you do not want the patient to enter his or her blood pressure.	<input type="checkbox"/> None <input type="checkbox"/> Pre
Manual Exchange Drain Volume	This indicates if you would like the patient to enter the volume of solution that the patient drained during manual exchange. This volume must be measured and entered in mL.	<input type="checkbox"/> None <input type="checkbox"/> Pre
Manual Exchange Time	This indicates if you would like the patient to enter the time of day that the manual exchange was performed.	<input type="checkbox"/> None <input type="checkbox"/> Pre
Manual Exchange Fill Volume	This indicates if you would like the patient to enter the Fill volume used for manual exchanges.	<input type="checkbox"/> None <input type="checkbox"/> Pre

7. Device Settings and Templates

Table 7-6. Patient Settings (continued)

SETTING	DESCRIPTION	RANGE
Manual Exchange Concentration	<p>This indicates the solution concentration type used for manual exchanges. When this setting is set to Pre on the device, it will initiate a patient survey question at the start of therapy to ask the patient to choose the solution concentration or solution type used during therapy. The selection option that the patient will have available is based on the following settings:</p> <ul style="list-style-type: none"> ■ Solution Type (Dianeal and/or Physioneal) ■ Extraneal ■ Nutrineal 	<ul style="list-style-type: none"> ■ None ■ Pre
Night Concentration	<p>This indicates the solution concentration type used during the night exchanges performed on the cyclor. When this setting is set to Pre on the device, it will initiate a patient survey question at the start of therapy to ask the patient to choose the solution concentration or solution type used during therapy. The selection option that the patient will have available is based on the following settings:</p> <ul style="list-style-type: none"> ■ Solution Type (Dianeal and/or Physioneal) ■ Extraneal ■ Nutrineal 	<ul style="list-style-type: none"> ■ None ■ Pre

Table 7-6. Patient Settings (*continued*)

SETTING	DESCRIPTION	RANGE
Last Fill Concentration	<p>The Last Fill Concentration is for the strength or type of dialysis solution used for the last Fill. The Last Fill Concentration may be different from other supply bag concentrations used for night therapy. The strength or type of dialysis solution is prescribed by your nephrologist.</p> <p>When this setting is set to Pre on the device, it will initiate a patient survey question at the start of therapy to ask the patient to choose the solution concentration or solution type used during therapy. The selection option that the patient will have available is based on the following settings:</p> <ul style="list-style-type: none"> ■ Solution Type (Dianeal and/or Physioneal) ■ Extraneal ■ Nutrineal 	<ul style="list-style-type: none"> ■ None ■ Pre
Solution Type (<i>Dianeal</i> and/or <i>Physioneal</i>)	This allows the clinician to select if glucose or dextrose solutions will be used in the patient's treatment.	<ul style="list-style-type: none"> ■ Dextrose (1.5%, 2.5%, 4.25%) ■ Glucose (1.36%, 2.27%, 3.86%)
<i>Extraneal</i>	This allows the clinician to determine if an Extraneal solution is used during a patient's therapy.	<ul style="list-style-type: none"> ■ No ■ Yes
<i>Nutrineal</i>	This allows the clinician to determine if a Nutrineal solution is used during a patient's therapy.	<ul style="list-style-type: none"> ■ No ■ Yes

7.6 System Settings

System Settings include the sound level, display screen brightness, and other settings.

The parameters to be programmed for System Settings as well as the allowable range for each setting are described in [Table 7-7](#) below.

Table 7-7. System Settings

SETTING	DESCRIPTION	RANGE
Flush Before Fill	Determines whether the patient's cyclor flushes solution in the cyclor's heater line, supply line(s), and last Fill line (if used).	<ul style="list-style-type: none"> <input type="checkbox"/> Yes <input type="checkbox"/> No
Fluid Temperature (Celsius)	Use this drop-down list to select the temperature of the heater bag fluid.	<ul style="list-style-type: none"> <input type="checkbox"/> 35 <input type="checkbox"/> 36 <input type="checkbox"/> 37
Two Chamber Bag	Use this drop-down list to tell the system if a two chamber bag is used.	<ul style="list-style-type: none"> <input type="checkbox"/> No <input type="checkbox"/> Yes
Reset Patient Weight	Use this drop-down list to tell the system if the patient's weight should be reset to the default value at the beginning of every therapy.	<ul style="list-style-type: none"> <input type="checkbox"/> No <input type="checkbox"/> Yes
Weight Units	Use this drop-down list to select the unit of measure for weight.	<ul style="list-style-type: none"> <input type="checkbox"/> kg <input type="checkbox"/> lb
Adjust Loudness	Use this drop-down list to set the volume level.	<ul style="list-style-type: none"> <input type="checkbox"/> Low <input type="checkbox"/> Medium <input type="checkbox"/> High <input type="checkbox"/> Maximum
Adjust Brightness	Use this drop-down list to set the brightness of the display screen.	<ul style="list-style-type: none"> <input type="checkbox"/> Low <input type="checkbox"/> Medium <input type="checkbox"/> High <input type="checkbox"/> Maximum
Language	Use this drop-down list to select a language for text displayed on the screen.	<ul style="list-style-type: none"> <input type="checkbox"/> List of languages
Auto-Dimming of Display	Use this drop-down list to have the display automatically dim after treatment begins.	<ul style="list-style-type: none"> <input type="checkbox"/> Yes <input type="checkbox"/> No

7.7 Creating and Editing Device Programs, Patient Settings, and System Settings

This section describes how the clinician creates, edits, and views Device Program Settings, Patient Settings, and System Settings.

Authorized clinicians can access the following group settings:

- Device Program Settings
- Patient Settings
- System Settings

These settings determine how the patient's treatment is delivered by the **Homechoice Claria** APD system.

WARNING



Ensure that the values you enter match the patient's prescription to avoid adverse events such as incorrect therapy, an IIPV situation, fluid build-up or dehydration.

7.7.1 Creating or Editing a Device Program

The first time a clinician sets up a patient's Device Program, the clinician should first review the Patient Settings and System Settings through the **Sharesource** portal. These are set to the default values and can be modified based on the clinician's region and preference. Generally, most System Settings will not need to be modified after the initial setup.

➤ **NOTE:** The Clinic Administrator determines whether a user has permission to create and edit settings in the Device Settings screen. Without this permission, the Add Program and Edit links will not be available.

Up to four Device Programs can be stored in the **Sharesource** portal, but the **Homechoice Claria** APD system allows only one Device Program to be active at a time. If a patient wants to run another program, the clinician must decide which Device Program to make active by clicking its Make Active link.

Once a Device Program is set as the Active Device Program, the patient will need to make sure that the **Homechoice Claria** APD system communicates with the **Sharesource** web portal in order to download the Active Device Program. This is usually done by turning the **Homechoice Claria** APD system OFF and then ON again.

7. Device Settings and Templates

The only time that a Device Program will automatically become active is when it is the first Device Program entered. All other new Device Programs will need to be selected as active after it is created.

- **NOTE:** One Device Program from the **Sharesource** portal must be designated as active. This Active Device Program will be communicated to the patient's device. Until this active device program is updated again, the device will continue using the existing active device program or its own last manually programmed therapy.

If there are already four Device Programs on a device, the **Sharesource** portal will not allow you to save another new Device Program. You must delete one of the four Device Programs before a new Device Program can be added. For information on deleting a Device Program, see [Section 7.9, Deleting a Device Program](#).

- **NOTE:** Once a Device Program is deleted, it cannot be retrieved.

When entering Device Program values for the first time, begin with the **Time** tab, and continue to populate the fields in the order they appear on each tab before moving to the next. As you create or edit a Device Program, the **Sharesource** portal guides you through each step. The values you enter may auto-populate other values or they may be required for calculations before you will be allowed to select the **Next** button and proceed to the next tab.

To create or edit a Device Program:

1. Click the **Clinical** tab.
2. Click the Device Settings icon  in the Actions column for that patient.

The Device Settings screen will appear.

The Device Settings screen has a function that guides you through steps for creating or editing a Device Program once data is entered.

- **NOTE:** Only patients that have received treatment within the past 28 days will display in the Treatment Dashboard.

The screenshot shows the 'Homechoice Claria' settings page for patient William Campbell. The page includes a navigation menu on the left with options like 'Return to Dashboard', 'Claria Patient Snapshot', 'Claria Treatment Summary', and 'Claria Device Settings'. The main content area displays patient information, including name, date of birth, and attending physician. Below this, there is a section for 'Homechoice Claria' settings, which includes a patient activation code and a table of device programs and system settings.

Name	Modified By	Modified On	Action
Device Programs			
Add Program	---	---	View / Edit / Make Active
EveryDay	Patel, Abigail	04 February 2019	View / Edit / Active
Essai ALE	Patel, Abigail	04 February 2019	View / Edit / Make Active
Add Program	---	---	View / Edit / Make Active
Patient Settings			
Patient Settings	131638	27 June 2017	View / Edit
System Settings			
System Settings	131638	15 May 2017	View / Edit

- Click **Add Program** in the Name column to create a new Device Program or **Edit** in the Action column to modify an existing program.

The Device Program screen will appear.

- If you are creating a new Device Program, enter a Device Program Name. The Device Program name is only seen by the dialysis center. The name is used to help clinicians more easily differentiate among the other Device Programs.

– OR –

Select an existing template name from the Apply Clinic Template drop-down list. Click **Apply Template** to edit and type a new name for this edited program.

► **NOTE:** Once a Device Program is deleted, it cannot be retrieved.

7. Device Settings and Templates

5. Enter the values for the new or modified program in the fields, beginning with the **Time** tab. Refer to [Section 7.3, Therapy Types](#) for information on entering values for specific therapy types. Refer to the tables in [Section 7.4, Device Program Settings](#) for information on entering values for the fields on each tab:

- [Table 7-2 Time Tab](#)
- [Table 7-3 Volume Tab](#)
- [Table 7-4 Tidal Tab](#)
- [Table 7-5 Settings Tab](#)

The screenshot shows the 'Homechoice Claria' settings page. At the top, there's a navigation bar with tabs: Clinical, Reports, Clinic Settings, Patient Administration, Users, and Help. Below this, a patient profile for 'Campbell, William' is shown, including his date of birth (25 January 1960), clinic patient ID (1223456789), and attending physician (Dr. Smith, Chloe). The main content area is titled 'Homechoice Claria' and contains a warning: 'This is the Active Device Program. These settings apply to a patient's device. Please enter all of the settings and select Review to continue to the settings confirmation page.' Below the warning, there's a section for 'Apply Clinic Template' with a 'Select' dropdown and an 'Apply Template' button. The main settings area has four tabs: Time, Volume, Tidal, and Settings. The 'Time' tab is selected, showing fields for 'Device Program Name' (EveryDay), 'Therapy Mode' (Standard), 'Night Therapy Time' (8 Hours, 0 Minutes), and 'Smart Dwells' (None). A 'Next' button is at the bottom right, and a 'Cancel' button is at the bottom left.

➤ **NOTE:** Upon entering program values, a pop-up window may be displayed for entering device-specific Device Program values.

6. Click **Next**, located at the lower right side of the screen, to move from tab to tab.

You can delete the added Device Program or cancel changes made to an edited Device Program. Confirm the deletion or cancellation. This will take you back to the Device Settings screen. Changes can be made before you submit the Device Program.

7. Continue with each tab until you have entered the desired values in all fields.

► **NOTE:** When the value of the Initial Drain Bypass dropdown is set to Enabled, a warning screen appears asking if you want to continue with the current settings.

Similar warning messages are displayed when the Initial Drain Bypass dropdown is set to Enabled and

- the Initial Drain Volume (IDV) is less than 70% of the Last Fill Volume
- manual exchange survey is enabled in Patient Settings

► **NOTE:** When a patient moves from a device that supports Initial Drain Bypass to one that does not, the following message is displayed in the Settings tab when you try to edit the Device Program: “Current device program is not supported by this version of the device. Contact Customer Service.”

For a standard mode device program, the Initial Drain Bypass dropdown will be non-editable and the last selected value will be displayed.

This device program will be rejected by the device as it is not compatible.

Clinical | Adequest | Reports | Clinic Settings | More ▾ | Help

Actions

- Return to Dashboard
- Claria Patient Snapshot
- Claria Treatment Summary
- Claria Device Settings
- > Claria Device Program**

BELLA, OLIVIA | **Attending Physician: Dr. RIHAN, EMMA**
 Date of Birth: 14 January 1985 | Clinic Patient ID: | Baxter Patient ID: O-ST123-1003508

Homechoice Claria

! This is the Active Device Program.
 These settings apply to a patient's device. Please enter all of the settings and select Review to continue to the settings confirmation page.

Apply Clinic Template
 Select ▾

Time | Volume | Tidal | **Settings**

Please enter values for the following:

Target Weight

 Range: 2 - 990 kg

Min Drain Volume (%)

Initial Drain Volume (mL)

 Range: 0 - 3,500 mL

Initial Drain Bypass
 Current device program is not supported by this version of the device. Contact Customer Service.

Last Fill Manual Drain

Heater Bag Empty

Program Locked

7. Device Settings and Templates

8. If a red X ✖ appears on the top of the screen, then there is either incorrect or missing data on one of the tabs. The tab that needs to be fixed is marked with a red X ✖ and the field(s) that needs to be fixed is identified with a red field.

The error on the tab must be corrected before you can move to the next tab. Correct the value(s) and, once all values are correctly entered, you can proceed to the next tab.

If a red X ✖ does not appear, the values are correct and a screen will appear where you can verify the Device Program Settings.

- **NOTE:** Before the confirmation screen appears, a notification screen may appear asking if you want to continue with the current settings.

The screenshot displays the Homechoice Claria settings interface. At the top, a navigation bar includes tabs for Clinical, Reports, Clinic Settings, Patient Administration, Users, and Help. A left sidebar lists actions such as Return to Dashboard, Claria Patient Snapshot, Claria Treatment Summary, Claria Device Settings, and Claria Device Program. The main content area shows patient information for Campbell, William, including Date of Birth (25 January 1960), Clinic Patient ID (1223456789), and Attending Physician (Dr. Smith, Chloe). A warning message states: "You have not entered all required information. Please try again." Below this, a section titled "Homechoice Claria" contains an information icon and the text: "This is the Active Device Program. These settings apply to a patient's device. Please enter all of the settings and select Review to continue to the settings confirmation page." Underneath, there is an "Apply Clinic Template" section with a "Select" dropdown menu and an "Apply Template" button. The "Volume" tab is active and shows a red X ✖. A callout box points to the "Total Volume (mL)" field, stating: "Note that text displays the valid allowable range to enter." The range is "200 - 80,000 ml." Below the field, a note reads: "The Total Volume is the target therapy volume to be delivered to the patient. The Estimated Therapy Volume will be calculated from the fill volumes and tidal settings and may not equal the Total Volume."

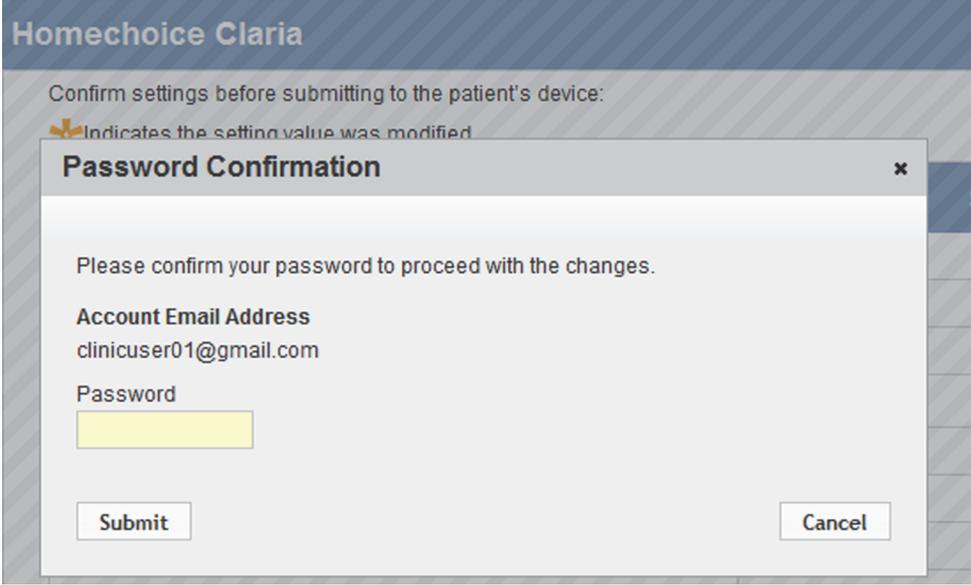
9. After all fields have been entered, click **Review** on the **Settings** tab.

- **NOTE:** An orange asterisk will appear in front of all settings in a new Device Program and all changes made to an existing Device Program.

10. Review the Device Program Settings. If you need to change a setting, click the **Back** button.

11. At the verification screen, click the **Submit** button.

A Password Confirmation screen will appear.



The screenshot shows a web interface for Homechoice Claria. At the top, it says "Homechoice Claria". Below that, a message reads "Confirm settings before submitting to the patient's device:" followed by a small orange icon and the text "Indicates the setting value was modified". A modal dialog box titled "Password Confirmation" is open in the center. The dialog contains the text "Please confirm your password to proceed with the changes." Below this, it displays "Account Email Address" as "clinicuser01@gmail.com" and "Password" with a yellow input field. At the bottom of the dialog are two buttons: "Submit" on the left and "Cancel" on the right.

12. Enter your password at the Password Confirmation screen and click **Submit**.

The **Sharesource** portal saves the new or updated Device Program Settings.

A Success Message icon and a confirmation message telling you the Device Program was successfully submitted will appear at the top of the Device Settings screen.

7. Device Settings and Templates

The screenshot shows the Homechoice Claria patient settings interface. The navigation bar includes 'Clinical', 'Reports', 'Clinic Settings', 'Patient Administration', and 'Users'. The sidebar on the left has 'Actions' with options: 'Return to Dashboard', 'Claria Patient Snapshot', 'Claria Treatment Summary', and 'Claria Device Settings'. The main content area displays patient information for 'Campbell, William' and a success message: 'The setting information has been successfully submitted.' Below this is a table of 'Device Programs' and 'Patient Settings'.

Name	Modified By	Modified On	Action
Device Programs			
Add Program	---	---	View / Edit / Make Active
EveryDay	Patel, Abigail	04 February 2019	View / Edit / Active
Essai ALE	Patel, Abigail	04 February 2019	View / Edit / Make Active
Add Program	---	---	View / Edit / Make Active
Patient Settings			
Patient Settings	131638	27 June 2017	View / Edit
System Settings			
System Settings	131638	15 May 2017	View / Edit

13. When the patient begins setup for a new treatment, the **Sharesource** portal transfers the new or updated Device Program Settings to the patient's device.

The patient's device displays a notice stating that it received new settings and that the patient must review and accept them before beginning treatment.

7.7.2 Viewing or Editing Patient Settings

The first time a clinician sets up a patient’s program, the clinician should review the Patient Settings through the **Sharesource** portal. These are set to the default values and can be modified based on your region or preference.

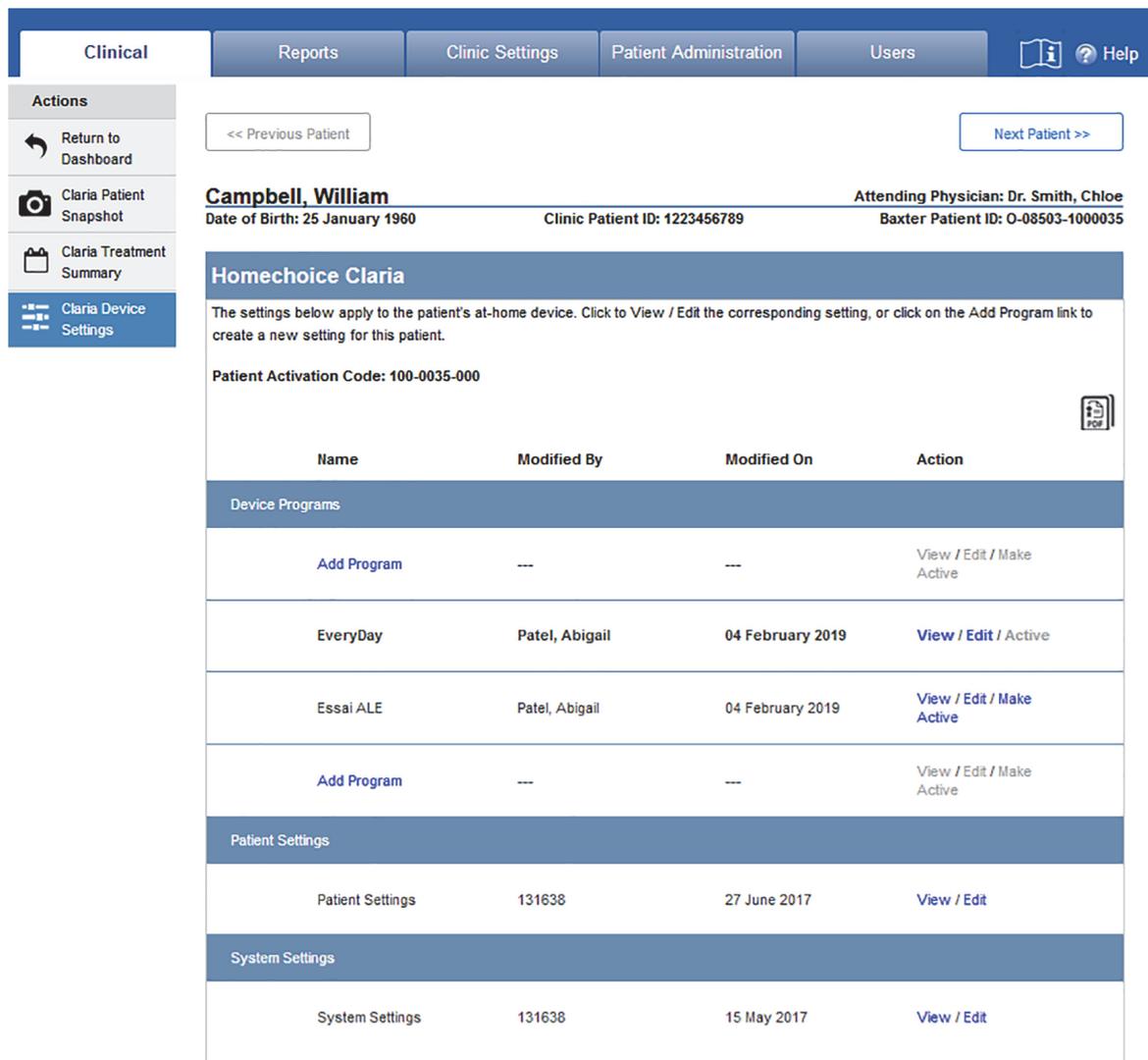
To view or edit Patient Settings:

1. Click the **Clinical** tab.
2. Click the Device Settings icon  in the Actions column for that patient.

The Device Settings screen will appear.

The Device Settings screen has a function that guides you through steps for creating or editing Patient Settings once data is entered.

➤ **NOTE:** Only patients that have received treatment within the past 28 days will display in the Treatment Dashboard.



The screenshot shows the Sharesource Clinical interface. The top navigation bar includes tabs for Clinical, Reports, Clinic Settings, Patient Administration, and Users, along with a Help icon. The left sidebar contains an Actions menu with options: Return to Dashboard, Claria Patient Snapshot, Claria Treatment Summary, and Claria Device Settings. The main content area displays patient information for William Campbell, including his date of birth (25 January 1960), clinic patient ID (1223456789), and attending physician (Dr. Smith, Chloe). Below this, the 'Homechoice Claria' section provides instructions on viewing and editing settings. A table lists 'Device Programs' and 'Patient Settings' with columns for Name, Modified By, Modified On, and Action.

Name	Modified By	Modified On	Action
Device Programs			
Add Program	---	---	View / Edit / Make Active
EveryDay	Patel, Abigail	04 February 2019	View / Edit / Active
Essai ALE	Patel, Abigail	04 February 2019	View / Edit / Make Active
Add Program	---	---	View / Edit / Make Active
Patient Settings			
Patient Settings	131638	27 June 2017	View / Edit
System Settings			
System Settings	131638	15 May 2017	View / Edit

7. Device Settings and Templates

3. Click **View** or **Edit** in the Patient Settings row.

➤ **NOTE:** The **Sharesource** portal does not allow clinicians to add a new setting.

The Patient Settings screen will appear with the following editable information:

- Weight (If Pre is selected, the following drop-down list appears)
 - Weight Displayed in Tenths
- Blood Pressure
- Manual Exchange Drain Volume
- Manual Exchange Time
- Manual Exchange Fill Volume
- Manual Exchange Concentration
- Night Concentration
- Last Fill Concentration

➤ **NOTE:** If Pre is selected for Manual Exchange Concentration, Night Concentration, or Last Fill Concentration, the following drop-down lists appear:

- Solution Type (**Dianeal** and/or **Physioneal**)
- **Extraneal**
- **Nutrineal**

Clinical
Reports
Clinic Settings
Patient Administration
Users
Help

Actions

Return to Dashboard

Claria Patient Snapshot

Claria Treatment Summary

Claria Device Settings

>Claria Patient Settings

Campbell, William Attending Physician: Dr. Smith, Chloe

Date of Birth: 25 January 1960 Clinic Patient ID: 1223456789 Baxter Patient ID: O-08503-100035

Homechoice Claria

These settings apply to a patient's device. Please enter all of the settings and select Review to continue to the settings confirmation page.

Apply Clinic Template
 Select ▼ Apply Template

Weight Weight Displayed in Tenths
 Pre ▼ No ▼

Blood Pressure
 Pre ▼

Manual Exchange Drain Volume
 Pre ▼

Manual Exchange Time
 None ▼

Manual Exchange Fill Volume
 Pre ▼

Manual Exchange Concentration
 Pre ▼

Night Concentration
 Pre ▼

Last Fill Concentration
 None ▼

Choose ordered solutions when one or more solution concentrations are selected above (Manual Exchange, Night, or Last). This will determine the solution options for the patient.

Solution Type (Dianeal and/or Physioneal)
 Glucose (1.36%, 2.27%, 3.86%) ▼

Extraneal
 Yes ▼

Nutrineal
 No ▼

Cancel
Review

4. Select the value for each parameter shown.
Refer to [Table 7-6](#) for complete information on entering the values for each field.
5. Click **Review**.
A screen will appear where you can verify the Patient Settings.

➤ **NOTE:** If you changed an existing Patient Setting, an orange asterisk will appear in front of the changes made to the edited Patient Setting.

07-19-73-157J1

Sharesource Connectivity Platform User Guide for Use with the
Homechoice Claria APD System

7-25

7. Device Settings and Templates

Campbell, William
Date of Birth: 25 January 1960 Clinic Patient ID: 1223456789 Timestamp: 05 February 2019, 05:52
Attending Physician: Dr. Smith, Chloe
Baxter Patient ID: O-08503-1000035

Homechoice Claria

Confirm settings before submitting to the patient's device:
✳ Indicates the setting value was modified.

Setting	Setting Value
Weight	Pre
✳ Weight Displayed in Tenths	Yes
Blood Pressure	Pre
Manual Exchange Drain Volume	Pre
Manual Exchange Time	None
Manual Exchange Fill Volume	Pre
Manual Exchange Concentration	Pre
Night Concentration	Pre
Last Fill Concentration	None
Solution Type (Dianeal and/or Physioneal)	Glucose (1.36%, 2.27%, 3.86%)
Extraneal	Yes
Nutrineal	No

- Review the Patient Settings. If you need to change a setting, click the **Back** button.
- If all Patient Settings are correct, click **Submit**.
A Password Confirmation screen will appear.

Homechoice Claria

Confirm settings before submitting to the patient's device:
✳ Indicates the setting value was modified.

Password Confirmation

Please confirm your password to proceed with the changes.

Account Email Address
clinicuser01@gmail.com

Password

- Enter your password at the Password Confirmation screen and click **Submit**.

The **Sharesource** portal saves the new or updated Patient Settings.

A Success Message icon and a confirmation message telling you the updated Patient Settings were successfully submitted will appear at the top of the Device Settings screen.

When the patient begins setup for a new treatment, the **Sharesource** portal transfers the updated Patient Settings to the patient's device.

The patient's device displays a notice stating that it received new settings and that the patient must review and accept them before beginning treatment.

The screenshot shows the Sharesource portal interface. At the top, there are navigation tabs: Clinical, Reports, Clinic Settings, Patient Administration, and Users. A sidebar on the left contains 'Actions' with options: Return to Dashboard, Claria Patient Snapshot, Claria Treatment Summary, and Claria Device Settings. The main content area shows patient information for **Campbell, William**, including Date of Birth (25 January 1960), Clinic Patient ID (1223456789), and Attending Physician (Dr. Smith, Chloe). A success message states: 'The setting information has been successfully submitted.' Below this, there is a table of device programs and settings.

Name	Modified By	Modified On	Action
Device Programs			
Add Program	---	---	View / Edit / Make Active
EveryDay	Patel, Abigail	04 February 2019	View / Edit / Active
Essai ALE	Patel, Abigail	04 February 2019	View / Edit / Make Active
Add Program	---	---	View / Edit / Make Active
Patient Settings			
Patient Settings	131638	27 June 2017	View / Edit
System Settings			
System Settings	131638	15 May 2017	View / Edit

7.7.3 Viewing or Editing System Settings

System Settings regulate the look and feel of the cyclor. Some of the preferences are weight units, language, and brightness of the display screen. Users can modify the preferences prior to or during treatment.

The first time a clinician sets up a patient's program, the clinician should review the System Settings through the **Sharesource** portal. These are set to the default values and can be modified based on your region or preference. Generally, most System Settings will not need to be modified after the initial setup.

To view or edit System Settings:

1. Click the **Clinical** tab.
1. Click the Device Settings icon  in the Actions column for that patient.

The Device Settings screen will appear.

The Device Settings screen has a function that guides you through steps for editing System Settings once data is entered.

➤ **NOTE:** Only patients that have received treatment within the past 28 days will display in the Treatment Dashboard.

Clinical | Reports | Clinic Settings | Patient Administration | Users | Help

Actions:

- Return to Dashboard
- Claria Patient Snapshot
- Claria Treatment Summary
- Claria Device Settings

<< Previous Patient | Next Patient >>

Campbell, William | Date of Birth: 25 January 1960 | Clinic Patient ID: 1223456789 | Attending Physician: Dr. Smith, Chloe | Baxter Patient ID: O-08503-100035

Homechoice Claria

The settings below apply to the patient's at-home device. Click to View / Edit the corresponding setting, or click on the Add Program link to create a new setting for this patient.

Patient Activation Code: 100-0035-000

Name	Modified By	Modified On	Action
Device Programs			
Add Program	---	---	View / Edit / Make Active
EveryDay	Patel, Abigail	04 February 2019	View / Edit / Active
Essai ALE	Patel, Abigail	04 February 2019	View / Edit / Make Active
Add Program	---	---	View / Edit / Make Active
Patient Settings			
Patient Settings	131638	27 June 2017	View / Edit
System Settings			
System Settings	131638	15 May 2017	View / Edit

2. Click **View** or **Edit** in the System Settings row.

➤ **NOTE:** The **Sharesource** portal does not allow clinicians to add a new setting.

The System Settings screen will appear with the following editable information:

- Flush Before Fill
- Fluid Temperature (Celsius)
- Two Chamber Bag
- Reset Patient Weight
- Weight Units
- Adjust Loudness
- Adjust Brightness
- Language
- Auto-Dimming of Display

7. Device Settings and Templates

The screenshot displays the 'Homechoice Claria' settings page. At the top, there is a navigation bar with tabs for 'Clinical', 'Reports', 'Clinic Settings', 'Patient Administration', and 'Users', along with an information icon and a 'Help' button. Below the navigation bar, the patient's name 'Campbell, William' is shown, along with 'Date of Birth: 25 January 1960', 'Clinic Patient ID: 1223456789', and 'Attending Physician: Dr. Smith, Chloe'. A 'Baxter Patient ID: O-08503-100035' is also listed. The main content area is titled 'Homechoice Claria' and includes a note: 'These settings apply to a patient's device. Please enter all of the settings and select Review to continue to the settings confirmation page.' Below this note, there is a section for 'Apply Clinic Template' with a dropdown menu set to 'Select' and an 'Apply Template' button. The settings section includes: 'Flush Before Fill' (Yes), 'Fluid Temperature (Celsius)' (37), 'Two Chamber Bag' (No), 'Reset Patient Weight' (No), 'Weight Units' (kg), 'Adjust Loudness' (Medium), 'Adjust Brightness' (High), 'Language' (Serbian), and 'Auto-Dimming of Display' (No). At the bottom, there are 'Cancel' and 'Review' buttons.

3. Select the value for each parameter shown.

See [Table 7-7](#) for complete information on entering the values for each field.

4. Click **Review**.

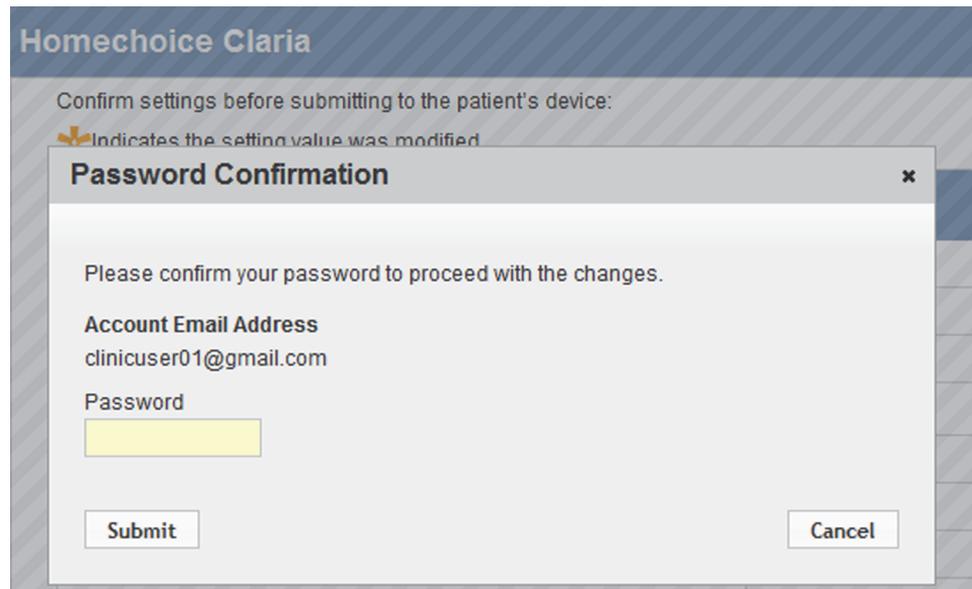
A screen will appear where you can verify the System Settings.

➤ **NOTE:** If you changed an existing System Setting, an orange asterisk will appear in front of the changes made to the edited System Setting.

5. Review the System Settings. If you need to change a setting, click the **Back** button.

6. If all System Settings are correct, click **Submit**.

A Password Confirmation screen will appear.



7. Enter your password at the Password Confirmation screen and click **Submit**.

The **Sharesource** portal saves the new or updated System Settings.

A Success Message icon and a confirmation message telling you the updated System Settings were successfully submitted will appear at the top of the Device Settings screen.

7. Device Settings and Templates

The screenshot displays the Homechoice Claria settings interface. At the top, there are navigation tabs: Clinical, Reports, Clinic Settings, Patient Administration, and Users. A sidebar on the left contains 'Actions' such as 'Return to Dashboard', 'Claria Patient Snapshot', 'Claria Treatment Summary', and 'Claria Device Settings'. The main content area shows patient details for Campbell, William, including his date of birth (25 January 1960) and clinic ID (1223456789). A notification at the top of the settings section states: 'The setting information has been successfully submitted.' Below this, a table lists various settings:

Name	Modified By	Modified On	Action
Device Programs			
Add Program	---	---	View / Edit / Make Active
EveryDay	Patel, Abigail	04 February 2019	View / Edit / Active
Essai ALE	Patel, Abigail	04 February 2019	View / Edit / Make Active
Add Program	---	---	View / Edit / Make Active
Patient Settings			
Patient Settings	131638	27 June 2017	View / Edit
System Settings			
System Settings	131638	15 May 2017	View / Edit

When the patient begins setup for a new treatment, the **Sharesource** portal transfers the updated System Settings to the patient's device.

A notice appears on the device screen stating that new settings have been received and must be reviewed and accepted before beginning the next treatment.

7.8 Applying a Clinic Template

The **Sharesource** portal allows users to create or edit an existing Device Program through the use of templates. The templates are applied to Device Program Settings, Patient Settings, and System Settings.

7.8.1 Applying a Template to a Device Program

For information on how to create a template, please refer to [Section 9.2, Using Templates](#).

To create or edit an existing Device Program using a template:

1. Click the **Clinical** tab.
2. Click the Device Settings icon  in the Actions column for that patient.
The Device Settings screen will appear.
3. Select a Device Program and click **Add Program** or **Edit** to enter a new or updated Device Program.
The Device Program screen will appear.

► **NOTE:** If there are already four Device Programs on a device, the **Sharesource** portal will not allow you to add another new Device Program. See [Section 7.9, Deleting a Device Program](#), for information on how to delete a Device Program.

4. Select a template from the Apply Clinic Template drop-down list.
5. Click **Apply Template**.
6. Click **Yes** on the pop-up window that appears to apply the template.

7. Device Settings and Templates

The screenshot shows the Homechoice Claria interface. At the top, there are navigation tabs: Clinical, Reports, Clinic Settings, and Patient Administration. The 'Clinical' tab is active. On the left, there is a sidebar with 'Actions' including: Return to Dashboard, Claria Patient Snapshot, Claria Treatment Summary, Claria Device Settings, and >Claria Device Program. The main content area displays patient information for 'Campbell, William' (Date of Birth: 25 January 1960, Clinic Patient ID: 1223456789) and a 'Homechoice Claria' section. A warning message states: 'This is the Active Device Program. These settings apply to a patient's device. Please enter all of the settings and select Review'. A red box highlights the 'Apply Clinic Template' dialog box, which contains a 'Select' dropdown menu (with 'Standard' and 'Low-Fill' visible), an 'Apply Template' button, and a 'Settings' button.

- **NOTE:** If a template is applied after values are entered, the entered values will be lost. Be sure to apply a template before entering any values. Remember to review the settings after applying the template.

Click **Yes** on the pop-up window that appears to apply the template.

The template settings will be applied to the current Device Program Settings.

7. Click **Next** to proceed through all of the tabs and ensure that every template parameter has been entered correctly for the patient. See [Table 7-2](#), [Table 7-3](#), [Table 7-4](#), and [Table 7-5](#) for information on Device Program Settings.

- **NOTE:** A Device Program Settings template may not have values for every field.

8. Click **Review** after you have verified the information. The list of Device Program Settings will appear.

- **NOTE:** If you changed an existing setting, an orange asterisk will appear in front of the setting that you changed.

9. Click **Submit**.

A Password Confirmation screen will appear.

10. Enter your password at the Password Confirmation screen and click **Submit**.

The template is now applied to the Device Program in the **Sharesource** portal. A Success Message icon and a confirmation message telling you the Device Program was successfully submitted will appear at the top of the Device Settings screen.

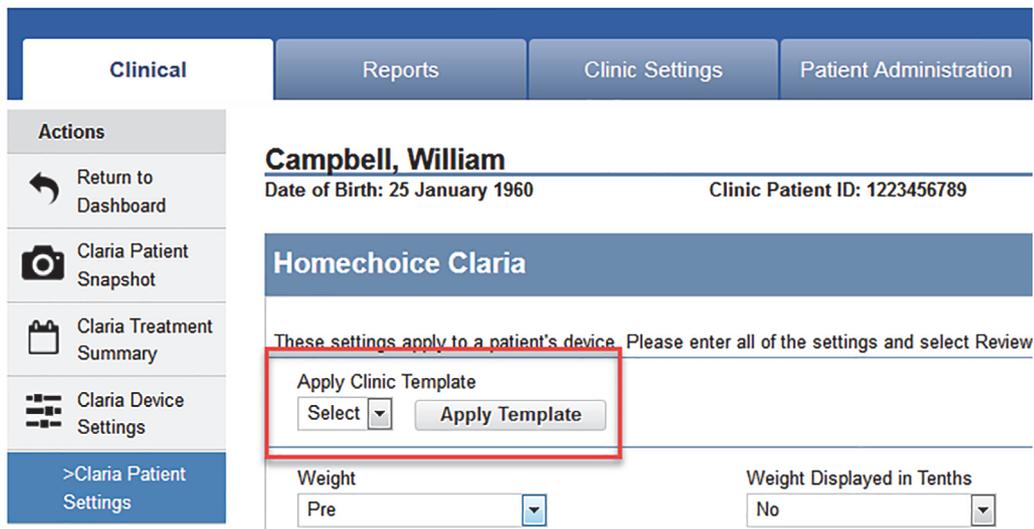
When the patient begins setup for a new treatment, the **Sharesource** portal transfers the new or updated Device Program Settings to the patient's device.

The patient's device screen displays a notice stating that it received new settings and that the patient must review and accept them before beginning treatment.

7.8.2 Applying a Template to Patient Settings

To edit Patient Settings using a template:

1. Click the **Clinical** tab.
2. Click the Device Settings icon  in the Actions column for that patient.
The Device Settings screen will appear.
3. Click **Edit** in the Patient Settings row.
The Patient Settings screen will appear.
4. Select a template from the Apply Clinic Template drop-down list.
5. Click **Apply Template**.
6. Click **Yes** on the pop-up window that appears to apply the template.



The screenshot shows the 'Clinical' tab selected in the top navigation bar. The main content area displays patient information for 'Campbell, William' (Date of Birth: 25 January 1960, Clinic Patient ID: 1223456789). Below this, the 'Homechoice Claria' section is visible, with a warning: 'These settings apply to a patient's device. Please enter all of the settings and select Review'. The 'Apply Clinic Template' section is highlighted with a red box, containing a 'Select' dropdown menu and an 'Apply Template' button. Below this, there are two dropdown menus: 'Weight' set to 'Pre' and 'Weight Displayed in Tenths' set to 'No'.

► **NOTE:** If a template is applied after values are entered, the entered values will be lost. Be sure to apply a template before entering any values. Remember to review the settings after applying the template.

Template settings will be applied to the current Patient Settings.

7. Device Settings and Templates

See [Table 7-6](#) for information on Patient Settings.

7. Click **Review** after you have verified the information. The list of Patient Settings will appear.

➤ **NOTE:** If you changed an existing setting, an orange asterisk will appear in front of the setting that you changed.

8. Click **Submit**.

A Password Confirmation screen will appear.

9. Enter your password at the Password Confirmation screen and click **Submit**.

The template is now applied to the Patient Settings in the **Sharesource** portal. A Success Message icon and a confirmation message telling you the Patient Settings were successfully submitted will appear at the top of the Device Settings screen.

When the patient begins setup for a new treatment, the **Sharesource** portal transfers the updated Patient Settings to the patient's device.

The patient's device screen displays a notice stating that it received new settings and that the patient must review and accept them before beginning treatment.

7.8.3 Applying a Template to System Settings

To edit System Settings using a template:

1. Click the **Clinical** tab.
2. Click the Device Settings icon  in the Actions column for that patient.
The Device Settings screen will appear.
3. Click **Edit** in the System Settings row.
The System Settings screen will appear.
4. Select a template from the Apply Clinic Template drop-down list.
5. Click **Apply Template**.
6. Click **Yes** on the pop-up window that appears to apply the template

- **NOTE:** If a template is applied after values are entered, the entered values will be lost. Be sure to apply a template before entering any values. Remember to review the settings after applying the template.

Click **Yes** on the pop-up window that appears to apply the template.

Template settings will be applied to the current System Settings.

See [Table 7-7](#) for information on System Settings.

7. Click **Review** after you have verified the information.

The list of System Settings will appear.

- **NOTE:** If you changed an existing System Setting, an orange asterisk will appear in front of the setting that you changed.

8. Click **Submit**.

A Password Confirmation screen will appear.

9. Enter your password at the Password Confirmation screen and click **Submit**.

The template is now applied to the System Settings in the **Sharesource** portal. A Success Message icon and a confirmation message telling you the System Settings were successfully submitted will appear at the top of the Device Settings screen.

When the patient begins setup for a new treatment, the **Sharesource** portal transfers the updated System Settings to the patient's device.

The patient's device screen displays a notice stating that it received new settings and that the patient must review and accept them before beginning treatment.

7.9 Deleting a Device Program

The **Sharesource** portal can save up to four Device Programs for each patient. To add additional Device Programs, you must delete obsolete Device Programs.

➤ **NOTE:** Once a Device Program is deleted, it cannot be retrieved.

➤ **NOTE:** An Active Device Program cannot be deleted. You must either edit the Active Device Program or select another program to be the Active Device Program before you can delete an Active Device Program.

To delete a Device Program:

1. Click the **Clinical** tab.
2. Click the Device Settings icon  in the Actions column for that patient.
3. From the Device Settings screen, click **Edit** for the Device Program you want to delete.
4. Click **Delete**.
A message will appear stating that the Device Program will be deleted.
5. Click **Delete**.
A Password Confirmation screen will appear.
6. Enter your password at the Password Confirmation screen and click **Submit**.
The Device Program is removed from the patient's list of available Device Programs.

8

Reports

8.1 Overview

The **Homechoice Claria** APD system transmits treatment information at the end of each treatment to the **Sharesource** portal. This information is used to generate different types of reports that you can view and print.

This section describes how to generate reports and provides a description of each report available in the **Sharesource** portal.

8.2 Generating Reports

Users can generate and view different types of patient reports from the **Sharesource** portal. This functionality lets clinicians update patient files and provide records as needed.

To generate a report:

1. Click the **Reports** tab.

Please select the Report Category and Report Name.
* Indicates required field.

* Report Category: Clinical Reports - Homechoice Claria
* Report Name: Select

2. From the Report Category drop-down list, select **Clinical Reports - Homechoice Claria**.
3. From the Report Name drop-down list, select the name of report you want to generate.
4. Enter the required report criteria for the report.

The report criteria controls that appear will vary depending on the report you select. For example, a Patient Treatment History report requires at least the patient's first or last name and a range of dates to be included in the report. Depending on the report selected, you can choose to generate the report as a PDF file or export it to an Excel spreadsheet.

8. Reports

Refer to [Table 8-1](#) to see the report criteria and format options for each report type.

- **NOTE:** Multiple reports may be needed when covering a wide time span. Error messages indicate that the date range selected is not within the allowable date range and you must edit the date range.

5. Search for a patient's first or last name.

If you select a patient-centric report, you will be required to select a patient. Click the [Select Patient](#) link, and a Patient Search pop-up window will appear where you can search for a patient.

The screenshot displays the 'Reports' section of a software interface. The top navigation bar includes 'Clinical', 'Reports', 'Clinic Settings', 'Patient Administration', 'Users', and 'Help'. The 'Reports' sidebar has 'Report Dashboard' selected. The main content area is divided into two sections. The first section, titled 'Please select the Report Category and Report Name', contains two dropdown menus: '* Report Category' (set to 'Clinical Reports - Homechoice Claria') and '* Report Name' (set to 'Patient Clinical Data'). The second section, titled 'Please populate the following report criteria and click Generate to complete the report request', contains several fields: '* Patient Name (Baxter Patient ID)' with a 'Select Patient' link (indicated by a red arrow), '* Report Start Date' and '* Report End Date' (both with calendar icons), and '* Report Format' with a radio button selected for 'Display as PDF'. A 'Generate' button is located at the bottom right. A 'Patient Search' pop-up window is overlaid on the right side, containing 'Patient Search Criteria' with 'Last Name' and 'First Name' input fields, 'Clear', and 'Search' buttons.

6. In the Patient Search pop-up window, enter the patient's last or first name. You do not have to enter an entire name, just a fragment.

- Click **Search** and the search results will appear.

The screenshot shows the 'Reports' section of a software interface. At the top, there are navigation tabs: Clinical, Reports, Clinic Settings, Patient Administration, and Users. The 'Reports' tab is selected. Below the tabs, there is a sidebar with 'Reports' and 'Report Dashboard'. The main content area contains a form with the following sections:

- Report Selection:** 'Please select the Report Category and Report Name. * Indicates required field.' It includes dropdown menus for '* Report Category' (Clinical Reports - Homechoice Claria) and '* Report Name' (Patient Clinical Data).
- Report Criteria:** 'Please populate the following report criteria and click Generate to complete the report request. * Indicates required field.' It includes:
 - * Patient Name (Baxter Patient ID) with a 'Select Patient' link.
 - * Report Start Date with a calendar icon.
 - * Report End Date with a calendar icon.
 - * Report Format with a radio button for 'Display as PDF'.
- Patient Search Dialog:** A modal window titled 'Patient Search' with a close button. It contains:
 - Patient Search Criteria:** Input fields for 'Last Name' (cam) and 'First Name' (w), with 'Clear' and 'Search' buttons.
 - Search Results:** A table with columns 'Patient Name', 'Baxter Patient ID', and 'Select Patient'. The first row shows 'Campbell, William', 'O-08503-1000029', and a 'Select' link. Below the table, it says 'Record 1-1 of 1'.

- In the Search Results table, click the Select link for the patient. That patient's name and ID are now part of the search criteria.
- Specify the rest of the criteria and click **Generate**.
A report generates according to the criteria you specified. After you generate the report, you can print it by clicking the Print button on your screen.

Table 8-1. Reports

REPORT NAME	REPORT CRITERIA			FORMAT OPTIONS	
	PATIENT NAME	START DATE	END DATE	PDF	SPREAD SHEET
Patient Clinical Data	X	X	X	X	
Patient Treatment History	X	X	X		X
Prescribed Versus Actual	X	X	X	X	
Treatment Flag and Events	X	X	X	X	
Treatment Summary	X	X	X	X	
Clinic Treatment History		X	X	X	X

8.3 Report Names

The following six report names are available with the **Sharesource** portal:

- Patient Clinical Data
- Patient Treatment History
- Prescribed Versus Actual
- Treatment Flag and Events
- Treatment Summary
- Clinic Treatment History

8.3.1 Patient Clinical Data Report

The Patient Clinical Data report lists the following patient characteristics:

- Treatment Date
- Device Program Name
- Night Cycle UF
- Total UF
- Pre-Weight
- Pre-Treatment Blood Pressure
- Night Concentrations
- Last Fill Concentration
- Manual Exchanges
- Flags

Campbell, William						Attending Physician: Dr. Patel, Abigail				
Date of Birth: 25 January 1960			Clinic Patient ID:			Baxter Patient ID: O-08503-1000029				
Northwest Dialysis Centers United: Homechoice Claria Patient Clinical Data Report										
Treatment Date	Device Program Name	Night Cycle UF (mL)	Total UF (mL)	Pre-Weight (kg)	Pre-Blood Pressure (mmHg)	Night Conc. 1	Night Conc. 2	Last Fill Conc.	Manual Exchanges	Flags
22 Jun 2014	Daily	807	951	103	125/72	1.5%	1.5%	1.5%	0	1
23 Jun 2014	Daily	809	954	102	130/83	1.5%	1.5%	1.5%	0	1
24 Jun 2014	Daily	812	955	102	131/88	1.5%	1.5%	1.5%	0	1
26 Jun 2014	Daily	814	956	103	119/88	1.5%	1.5%	1.5%	0	0
27 Jun 2014	Daily	812	956	103	132/88	1.5%	1.5%	1.5%	0	1
28 Jun 2014	Daily	809	954	103	127/77	1.5%	1.5%	1.5%	0	0
29 Jun 2014	Daily	807	950	102	119/81	1.5%	1.5%	1.5%	0	1

Patient Confidential Information



Report Start Date: 22 June 2014

Report Timestamp: 02 July 2014, 15:40

Exported By: Mulowski, Eva

Report End Date: 29 June 2014

Page 1 of 1



8.3.2 Patient Treatment History Report

The Patient Treatment History report provides detailed information about the patient's treatments. The Patient Treatment History report lets users perform comparisons and pinpoint anomalies. The report includes information about:

- Treatment Date
- Device Program Name
- Night Therapy Time
- Total Therapy Volume
- Day, Night, and Last Fill Volumes
- Number of Night Cycles
- Night Dwell Time
- Initial Drain Volume
- Initial Drain Bypassed - indicates if the patient chose to bypass initial drain.
- Day, Night Cycle, and Total UF
- Number of Manual Exchanges
- Night and Last Fill Concentrations
- Pre-Treatment data on
 - Blood Pressure
 - Weight

8.3.3 Prescribed Versus Actual Report

Patients have flexibility with performing treatments. Patients can deviate from their prescribed plans. The Prescribed Versus Actual report displays the difference between the program prescribed by a physician and what program the patient chose to follow. The report notes information regarding the:

- Treatment Date
- Night Therapy Time
- Number of Night Cycles
- Avg Dwell Time
- Total Therapy Volume
- Avg Fill Volume
- Device Program Name
- Night UF/Total UF
- Pre-Treatment data on Blood Pressure and Weight
- Initial Drain Volume

- Initial Drain Bypass

8.3.4 Treatment Flag and Events Report

During treatment, if an event occurs to trigger a treatment flag, a priority or high priority flag displays in the **Sharesource** portal on the patient's Treatment Dashboard. Clinicians can generate a report of the events and flags that occurred during specified treatments. The Treatment Flag and Events report includes:

- Number of priority and high priority flag events
- Type of flags the events triggered
- A description of the priority and high priority flag events

8.3.5 Treatment Summary Report

The Treatment Summary report contains information about individual treatment sessions. At the end of each treatment, the device transmits information to the **Sharesource** portal. The treatment information includes:

- Flag Symbols and their descriptions (if any)
- Prescribed Device Program
- Actual treatment time
- Solution concentrations
- Patient survey data (such as pre-treatment weigh and pre-treatment blood pressure)
- Device data
- Total therapy UF
- Therapy details in a run sheet format
- Manual drain information
- Cycle profiles
- Manual Exchange Information (if any)
- Device Program Settings
- Device Program Tidal Settings (if any)
- Treatment Events (if any)

8.3.6 Clinic Treatment History Report

The Clinic Treatment History report provides a list of patients at specific dialysis centers. The report contains general information about each patient's treatment and whether or not they are still actively undergoing treatment. Information includes:

- Patient Name
- Patient Date of Birth
- Baxter Patient ID and Clinic Patient ID
- Patient Status
- Therapy Start Date
- Number of Treatments
- Average Length of Treatment (hours)

9

Clinic Settings

9.1 Overview

This section describes how to manage Device Program, Patient, and System Settings templates and explains flags, flag rules, how flags relate to certain parts of the portal, and how to configure settings for them.

► **NOTE:** Only users with **Homechoice Claria** Clinical Settings Manager access will see the **Clinic Settings** tab and be able to create and modify templates.

9.2 Using Templates

When using templates, the following apply:

- Templates enable users to create or update Device Program, Patient, and System Settings
- Templates can be applied to any patient within that center
- Templates can be created or updated for multiple devices from the Device Template screen if multiple dialysis systems are available in your country

All Device Program Settings, Patient Settings, and System Settings template fields must have values entered.

- Entering values that apply to all or most patients can reduce editing

Table 9-1. Maximum Number of Templates That Can Be Created

TEMPLATE TYPE	MAXIMUM TEMPLATES
Device Programs	4
Patient Settings	1
System Settings	1

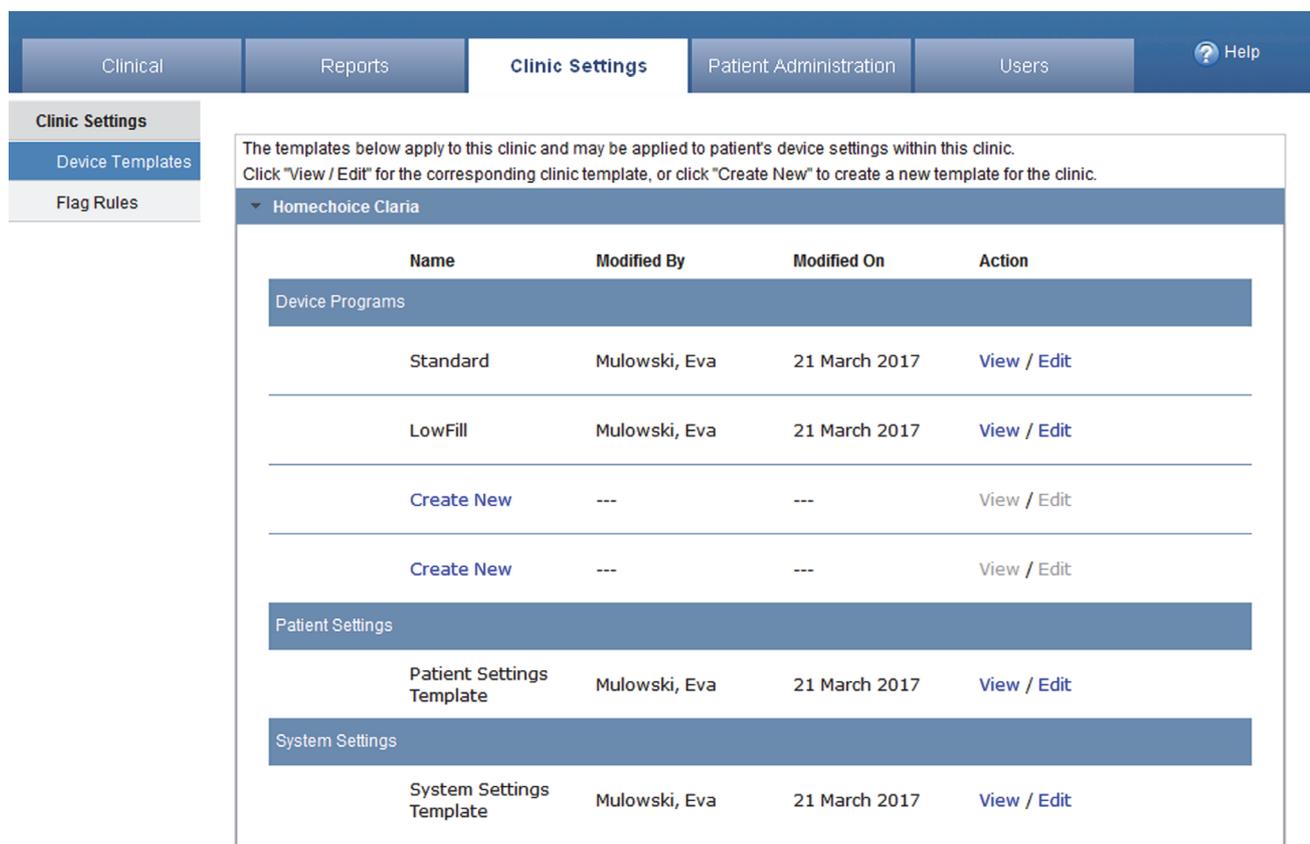
9. Clinic Settings

9.2.1 Creating a Template for a Device Program

➤ **NOTE:** A template name must be specified in order for the template to be submitted.

To create a Device Program template:

1. Click the **Clinic Settings** tab.
2. In the Clinic Settings secondary navigation menu, click **Device Templates** and select **Homechoice Claria**.



The screenshot shows the Homechoice Claria interface. At the top, there is a navigation bar with tabs for Clinical, Reports, Clinic Settings (selected), Patient Administration, and Users, along with a Help icon. On the left, a secondary navigation menu is open, showing Clinic Settings, Device Templates (selected), and Flag Rules. The main content area displays a message: "The templates below apply to this clinic and may be applied to patient's device settings within this clinic. Click 'View / Edit' for the corresponding clinic template, or click 'Create New' to create a new template for the clinic." Below this, a table lists templates for Homechoice Claria, categorized into Device Programs, Patient Settings, and System Settings.

Name	Modified By	Modified On	Action
Device Programs			
Standard	Mulowski, Eva	21 March 2017	View / Edit
LowFill	Mulowski, Eva	21 March 2017	View / Edit
Create New	---	---	View / Edit
Create New	---	---	View / Edit
Patient Settings			
Patient Settings Template	Mulowski, Eva	21 March 2017	View / Edit
System Settings			
System Settings Template	Mulowski, Eva	21 March 2017	View / Edit

➤ **NOTE:** When creating, viewing, or editing templates, patient information does not appear at the top of the screen.

- In the Name column of the Device Programs section, click **Create New**.
The Device Program Template screen will appear.

The screenshot displays the 'Homechoice Claria' interface for creating a device program template. The navigation bar at the top includes 'Clinical', 'Reports', 'Clinic Settings' (active), 'Patient Administration', and 'Users', along with a 'Help' icon. The left sidebar shows 'Clinic Settings' expanded to 'Device Templates', with '>Homechoice Claria Device Program Template' selected. The main form area is titled 'Homechoice Claria' and contains the instruction: 'To create the device program template, please enter all of the settings and select Submit.' Below this are four tabs: 'Time', 'Volume', 'Tidal', and 'Settings'. The 'Time' tab is active, showing the following fields: 'Device Program Template Name' (text input), 'Therapy Mode' (dropdown menu with 'Select' visible), 'Night Therapy Time' (two input fields for 'Hours' and 'Minutes' with a range of '0:10 - 48:00, in increments of 0:10'), and 'Smart Dwells' (dropdown menu with 'Smart Dwells Up and Down' visible). At the bottom of the form are 'Cancel' and 'Next' buttons.

- In the Device Program Template Name field, enter a name for the new template.
- Enter values for the Device Program in the following tabs:
 - Time
 - Volume
 - Tidal
 - Settings

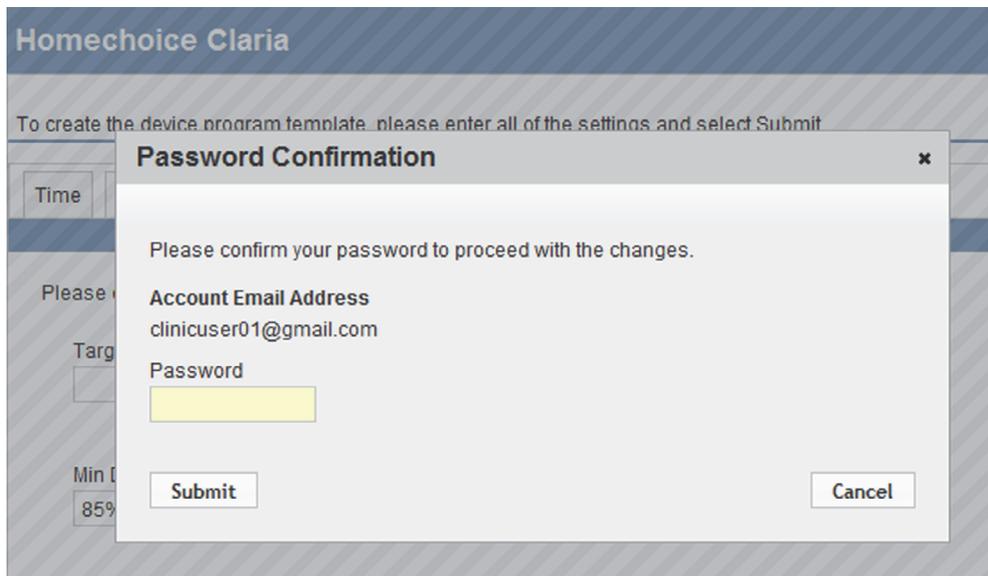
➤ **NOTE:** When creating a Device Program Template, the Target Weight fill and Initial Drain Bypass will not appear. You need to enter values for these fields when using a device program template.

- Click **Next** to proceed to the next tab and continue entering values.

9. Clinic Settings

7. Click **Submit**.

A Password Confirmation screen will appear.



8. Enter your password and click **Submit**.

The Device Program template is saved to the **Sharesource** portal.

9.2.2 Viewing a Template for a Device Program

To view an existing Device Program template:

1. Click the **Clinic Settings** tab.
2. In the Clinic Settings secondary navigation menu, click **Device Templates** and select **Homechoice Claria**.
3. In the Action column, click **View** in the row of the Device Program template you want to view.

The selected template will appear. Users can view settings for the following tabs:

- Time
- Volume
- Tidal
- Settings

➤ **NOTE:** No changes are allowed in View mode. If you wish to modify a template, click **Edit** in the Action column.

9.2.3 Modifying a Template for a Device Program

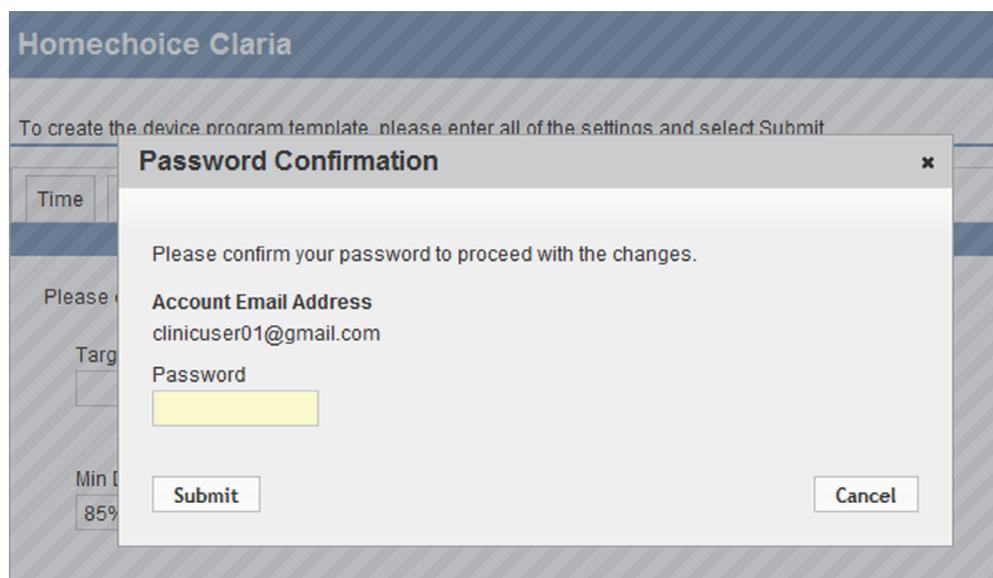
To modify an existing Device Program template:

1. Click the **Clinic Settings** tab.
2. In the Clinic Settings secondary navigation menu, click **Device Templates** and select **Homechoice Claria**.
3. In the Action column, click **Edit** in the row containing the name of the Device Program template you want to modify.

The selected template will appear with the following tabs:

- Time
 - Volume
 - Tidal
 - Settings
4. Enter the new values for the Device Program template as needed and click **Next** at the bottom of the screen until you have entered the desired values in all fields.
 5. Click **Submit**.

A Password Confirmation screen will appear.



6. Enter your password and click **Submit**.

The modified Device Program template is saved to the **Sharesource** portal.

9. Clinic Settings

9.2.4 Viewing or Modifying a Template for Patient Settings

To view or modify a Patient Settings template:

1. Click the **Clinic Settings** tab.
2. In the Clinic Settings secondary navigation menu, click **Device Templates** and select **Homechoice Claria**.

The screenshot shows the 'Clinic Settings' tab selected in the top navigation bar. On the left, a secondary navigation menu has 'Device Templates' selected. The main content area displays a table of templates for 'Homechoice Claria'. The table is organized into sections: 'Device Programs', 'Patient Settings', and 'System Settings'. Each section contains a list of templates with columns for Name, Modified By, Modified On, and Action. The 'Action' column for each row contains a 'View / Edit' link. There are also 'Create New' links in the 'Device Programs' section.

Name	Modified By	Modified On	Action
Device Programs			
Standard	Mulowski, Eva	21 March 2017	View / Edit
LowFill	Mulowski, Eva	21 March 2017	View / Edit
Create New	---	---	View / Edit
Create New	---	---	View / Edit
Patient Settings			
Patient Settings Template	Mulowski, Eva	21 March 2017	View / Edit
System Settings			
System Settings Template	Mulowski, Eva	21 March 2017	View / Edit

- To view or edit an existing Patient Settings template, click **View** or **Edit** in the Action column in the Patient Settings section of the Device Templates screen.

The Patient Settings Template screen will appear.

The screenshot displays the 'Homechoice Claria' Patient Settings Template configuration screen. At the top, a navigation bar includes 'Clinical', 'Reports', 'Clinic Settings' (active), 'Patient Administration', 'Users', and 'Help'. A sidebar on the left shows 'Clinic Settings' expanded to 'Device Templates', with '>Homechoice Claria Patient Settings Template' selected. The main content area is titled 'Homechoice Claria' and contains the instruction: 'To create the patient settings template, please enter all of the settings and select Submit.' Below this, several settings are listed, each with a dropdown menu currently set to 'None':

- Weight: None
- Blood Pressure: None
- Manual Exchange Drain Volume: None
- Manual Exchange Time: None
- Manual Exchange Fill Volume: None
- Manual Exchange Concentration: None
- Night Concentration: None
- Last Fill Concentration: None

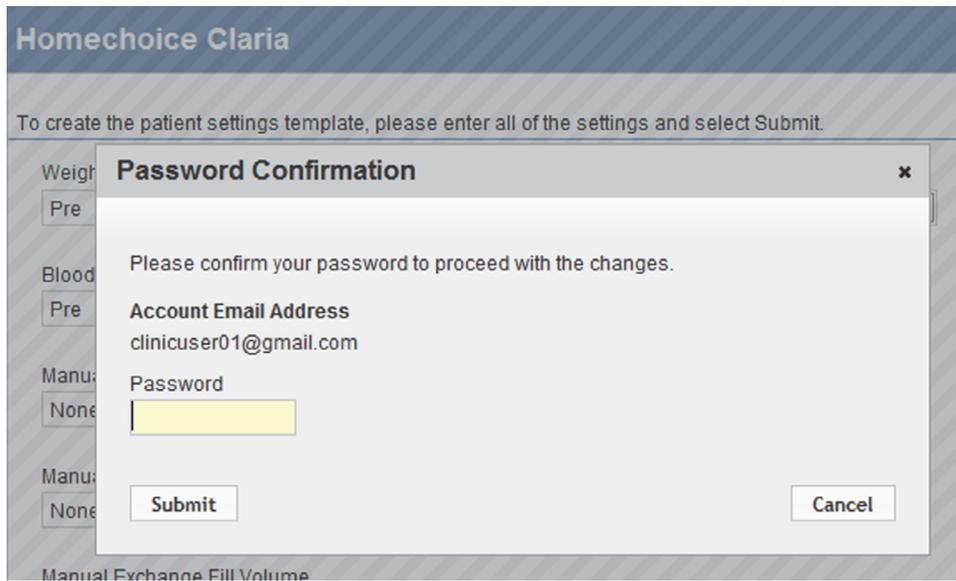
At the bottom of the form, there are 'Cancel' and 'Submit' buttons.

- Enter the new values for the Patient Settings template as needed.

9. Clinic Settings

5. Click **Submit**.

A Password Confirmation screen will appear.



6. Enter your password and click **Submit**.

The Patient Settings template is saved to the **Sharesource** portal.

9.2.5 Viewing or Modifying a Template for System Settings

To view or modify a System Settings template:

1. Click the **Clinic Settings** tab.
2. In the Clinic Settings secondary navigation menu, click **Device Templates** and select **Homechoice Claria**.

The screenshot shows the 'Clinic Settings' tab selected in the top navigation bar. On the left, a secondary navigation menu has 'Device Templates' selected. The main content area displays a table of templates for 'Homechoice Claria'. The table has columns for Name, Modified By, Modified On, and Action. It is divided into three sections: Device Programs, Patient Settings, and System Settings. Each section contains one or more rows with 'View / Edit' links.

Homechoice Claria			
Name	Modified By	Modified On	Action
Device Programs			
Standard	Mulowski, Eva	21 March 2017	View / Edit
LowFill	Mulowski, Eva	21 March 2017	View / Edit
Create New	---	---	View / Edit
Create New	---	---	View / Edit
Patient Settings			
Patient Settings Template	Mulowski, Eva	21 March 2017	View / Edit
System Settings			
System Settings Template	Mulowski, Eva	21 March 2017	View / Edit

9. Clinic Settings

- To view or edit an existing System Settings template, click **View** or **Edit** in the Action column in the System Settings section of the Device Templates screen.

The System Settings Template screen will appear.

The screenshot displays the 'Homechoice Claria' system settings template configuration screen. The interface includes a top navigation bar with 'Clinic Settings' highlighted, a left sidebar with 'Homechoice Claria System Settings Template' selected, and a main content area. The main area contains a title 'Homechoice Claria' and a subtitle 'To create the system settings template, please enter all of the settings and select Submit.' Below this, there are several settings, each with a dropdown menu:

- Flush Before Fill: Yes
- Fluid Temperature (Celsius): 36
- Two Chamber Bag: No
- Reset Patient Weight: No
- Weight Units: kg
- Adjust Loudness: Maximum
- Adjust Brightness: Maximum
- Language: English (US)
- Auto-Dimming of Display: No

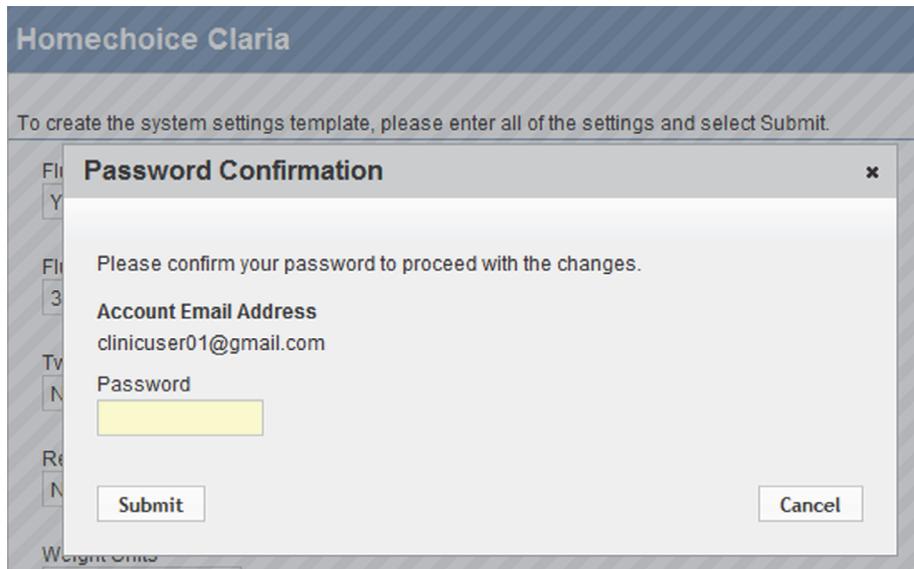
At the bottom of the form, there are 'Cancel' and 'Submit' buttons.

- Enter the new values for the System Settings template as needed.

You do not need to make a selection in every field. If you do not enter a value, the system automatically populates the field with the default value set by the manufacturer.

- Click **Submit**.

A Password Confirmation screen will appear.



- Enter your password and click **Submit**.

The System Settings template is saved to the **Sharesource** portal.

9.2.6 Deleting a Device Program Template

To delete a Device Program template:

- Click the **Clinic Settings** tab.
- In the Clinic Settings secondary navigation menu, click **Device Templates** and select **Homechoice Claria**.
- In the Action column, click **Edit** in the Device Program row containing the name of the template you want to delete.

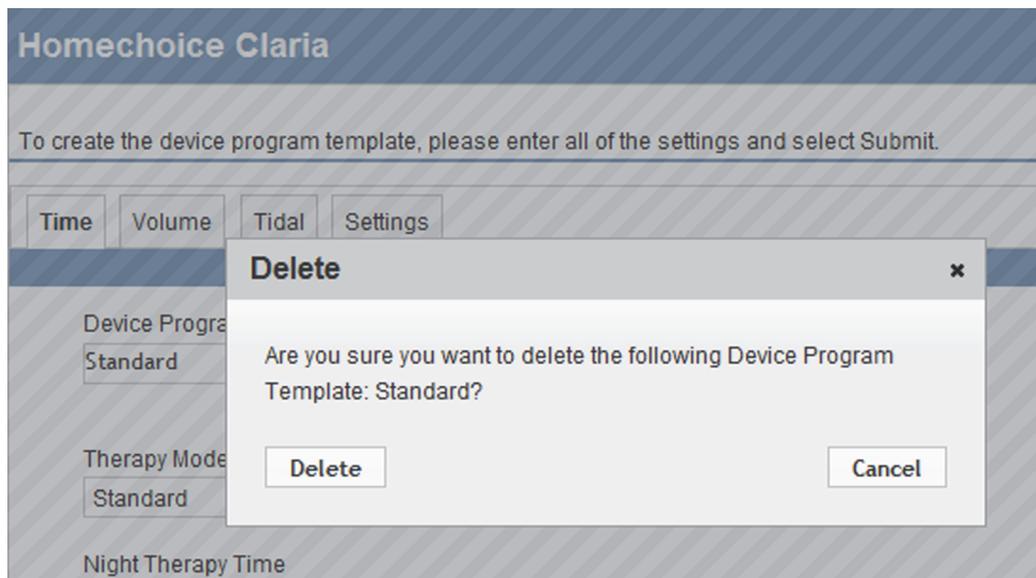
The selected template will appear.

- At the bottom of the page, click **Delete**.

► **NOTE:** Once a Device Program template is deleted, it cannot be retrieved.

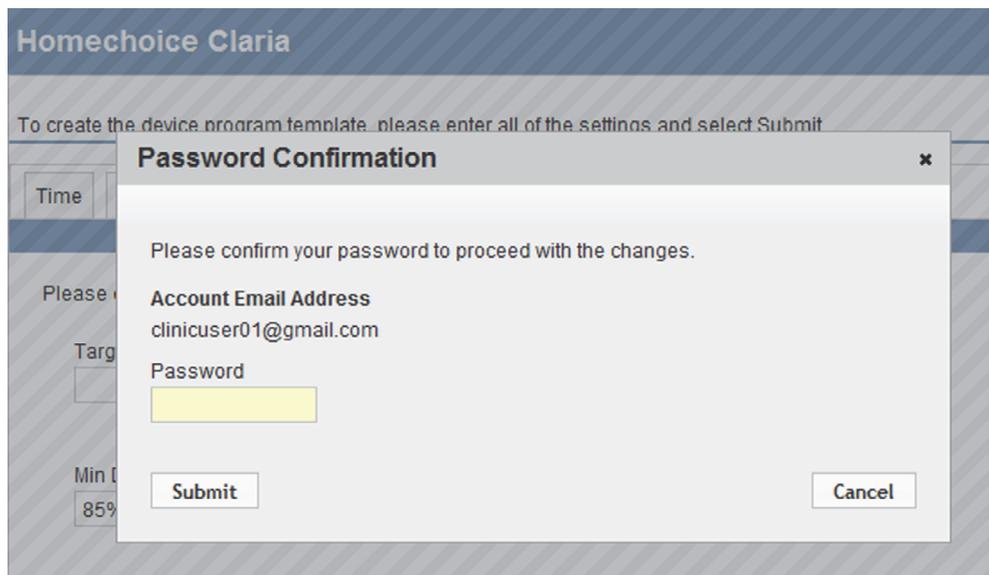
9. Clinic Settings

A confirmation message will appear.



5. Click **Delete**.

The Password Confirmation screen will appear.



6. Enter your password at the Password Confirmation screen and click **Submit**.

The template is permanently removed from the **Sharesource** portal.

9.3 Flag Rule Settings

Event flags appear on the Patient Snapshot, Treatment Summary, and the Dashboard for your dialysis center. Flag rules determine what criteria should be met to display flags on the Dashboard, Patient Snapshot, and Treatment Summary screens. They also assist with finding patients that match criteria defined in the flag rule settings.

Flags are dynamic. This means that the flags can change. The current flags on the Dashboard, Patient Snapshot, and Treatment Summary are immediately updated when the flag rule settings are updated and submitted. Changes depend on when you view these screens and when you view past treatments that may not have had a flag rule previously active or set.

Flag rules are calculated and will not have a time stamp applied. This is because triggers may not be known until the end of a treatment.

Privileges for setting flag rules are controlled by your dialysis center administrator.

Flags on the Dashboard identify and prioritize potential issues. When an event meets the set of criteria, the flag will display and the reason for the flag will display when you hover over it.

Each flag rule has a description, instructions, and can be active (when selected) or inactive (when not selected) for your dialysis center. This is achieved by checking or unchecking the check box to the left of the flag rule. Once you click the check box in the Flag Rule column, you can choose trigger values to further assist in identifying dialysis center-specific information.

► **NOTE:** Only users with **Homechoice Claria** Clinical Settings Manager access will see the **Clinic Settings** tab and be able to modify, activate, or deactivate flag rule settings.

For example, you can set a rule to display a priority flag if a patient shortens a treatment by 15 minutes and a high priority if the treatment is shortened by 30 minutes. Your dialysis center's flag rule settings are applied to all patients within your center for processing treatment data.

► **NOTE:** After setting a value for a priority (yellow) flag, you will not be able to use the same or lower value for a high priority (red) flag.

All flags, regardless of how they are calculated, let you classify them as either priority or high priority. When an event occurs that triggers the flag, the flag (either priority or high priority) and the reason for the flag display on the patient's Dashboard.

9. Clinic Settings

Table 9-2. Flag Rules

FLAG RULE	DESCRIPTION
Treatment Duration Section	
Lost Treatment Time	This flag rule is used to trigger an alert when a night treatment time is less than the programmed time.
Treatment Variances Section	
Lost Dwell Time	This flag rule is used to trigger an alert when an actual treatment Dwell Time is less than the programmed total Dwell Time.
Lost Therapy Volume	This flag rule is used to trigger an alert when an actual therapy volume is less than the programmed total therapy volume.
Drain Ended Early	This flag rule is used to trigger an alert when any Drain is bypassed.
Initial Drain Variance	This flag rule is used to trigger an alert if the actual Initial Drain Volume is different than the programmed Initial Drain Volume.
Initial Drain Bypass	This flag rule is used to trigger an alert if the actual initial drain bypass value is different than the programmed initial drain bypass value.
Device Program Variance	This flag rule is used to trigger an alert if the cyclor device program does not match the Sharesource device program.
Fluid Control Section	
High Drain	This flag rule is used to trigger an alert if the Drain volume is more than 200% of the Day, Night, or Last Fill Volume for Standard Fill Mode and if the Drain volume is more than 190% of the Day, Night, or Last Fill volume for Low-Fill Mode.

Table 9-2. Flag Rules (continued)

FLAG RULE	DESCRIPTION
Patient Intervention Section	
Fill/Dwell Bypass Count	This flag rule is used to trigger an alert when the number of bypass events that occurred during the Dwell or Fill phases in the treatment is equal to or greater than the selected value.
System Alerts Section	
Events During Treatment	This flag rule is used to trigger an alert when the number of events that occurred during the treatment is equal to or greater than the selected value.

9.3.1 Viewing or Modifying Flag Rule Settings

To view or modify flag rule settings:

1. Click the **Clinic Settings** tab.
2. In the Clinic Settings secondary navigation menu, click **Flag Rules** and select **Homechoice Claria**.

The Flag Rules screen will appear.

The flag rules below apply to this clinic and may be applied to device settings of patients within this clinic. Click "View / Edit" for the corresponding clinic flag rules.

Homechoice Claria			
Name	Modified By	Modified On	Action
Homechoice Claria Flag Rules	Mulowski, Eva	21 March 2017	View / Edit

9. Clinic Settings

3. Click **View** or **Edit** in the Action column.

The Flag Rules settings screen will appear.

Clinical Reports Clinic Settings Patient Administration Users Help

Clinic Settings

Device Templates

Flag Rules

>Homechoice Claria Flag Rules

Homechoice Claria

Please select which flag rules you would like to set for your clinic. The selected flag rules will appear as ! or !! on the Treatment Dashboard instead of a ✔ if the selected criteria for the flag rule is met during a treatment. To set a flag rule:
 Step 1: Tick the box to the left of the flag rule to activate that rule.
 Step 2: Using the description of the rule as guidance, select the value for which you would like to see a ! (priority) and/or !! (high priority) flag to appear on the dashboard.

Note: The use and selection of flag rules is optional and will apply to all patients at the clinic. Changes to the flag rules are dynamic and will apply to historical treatments as well as future treatments.

Flag Rule	Instructions	Trigger	
Treatment Duration		!	!!
<input type="checkbox"/> Lost Treatment Time	Set a flag to be triggered if actual night treatment time is less than the programmed time by the selected flag trigger value.	minutes	minutes
Treatment Variances		!	!!
<input type="checkbox"/> Lost Dwell Time	Set a flag to be triggered if actual treatment dwell time is less than the programmed total dwell time by the selected flag trigger value.	minutes	minutes
<input checked="" type="checkbox"/> Lost Therapy Volume	Set a flag to be triggered if actual therapy volume is less than the programmed total therapy volume by the selected flag trigger value.	5 %	10 %
<input type="checkbox"/> Drain Ended Early	Set a flag to be triggered when any drain is bypassed. The flag will appear when the number of bypassed drains is equal to, or greater than, the selected flag trigger value.		
<input type="checkbox"/> Initial Drain Variance	Set a flag to be triggered if actual initial drain volume is different than the programmed initial drain volume by the selected flag trigger value.	%	%
<input checked="" type="checkbox"/> Initial Drain Bypass	Set a flag to be triggered if actual initial drain bypass value is different than the programmed initial drain bypass value.	<input checked="" type="radio"/>	<input type="radio"/>
<input type="checkbox"/> Device Program Variance	Set a flag to be triggered if the cyclor device program does not match Sharesource device program.	<input type="radio"/>	<input type="radio"/>
Fluid Control		!	!!
<input type="checkbox"/> High Drain	Set a flag to be triggered if the drain volume is more than 200% of the Day, Night or Last Fill volume for standard Fill mode and if the drain volume is more than 190% of the Day, Night or Last fill volume for Low Fill mode.	<input type="radio"/>	<input type="radio"/>
Patient Intervention		!	!!
<input type="checkbox"/> Adjusted Peritoneal Volume	Set a flag to be triggered if the number of times the device operator selected stop or drain during dwell or fill is equal to, or greater than, the selected flag trigger value.		
System Alerts		!	!!
<input type="checkbox"/> Events During Treatment	Set a flag to be triggered if the number of events that occurred during treatment is equal to, or greater than, the selected flag trigger value.		

Cancel
Submit

4. Configure any of the available flag rule settings by first clicking the associated check box and then selecting a value from the drop-down lists or clicking the appropriate radio button.

The dialysis center can decide the priority of the triggers by selecting values listed in the drop-down lists.

➤ **NOTE:** If you use a value for a priority (yellow) flag, you cannot use the same or lower value for a high priority (red) flag.

➤ **NOTE:** Some flag rules only have radio buttons for priority and high priority flags. You cannot enter values. If the radio button is selected, you will see a flag (either priority or high priority) if the condition is met.

5. Click **Submit**. Any changes that were made will be saved.

The flag rule settings are saved in the **Sharesource** portal and applied immediately to every patient in your center.

➤ **NOTE:** Any changes in flag rules will apply to all treatments from the date submitted and all past treatments.

9. Clinic Settings

10

Patient Administration

10.1 Overview

This section describes how to search for a patient in the portal, how to add patients to the dialysis center, and how to edit a patient's information in the portal.

- **NOTE:** Depending on the functionality available at your dialysis center, you will see one of these two tabs:
- Customer Service
 - Patient Administration

If you have the **Customer Service** tab, the rest of Section 10 does not apply to you. Click the **Help** icon to display a screen listing available user manuals for your particular region.

10.2 Searching for a Patient

To search for a patient in the *Sharesource* portal:

1. Click the **Patient Administration** tab.

The Patient Search screen will appear.

The screenshot displays the Patient Search interface. At the top, there is a navigation bar with tabs for Clinical, Reports, Clinic Settings, Patient Administration (selected), and Users. A sidebar on the left contains a 'Patients' menu with 'Patient Search' and 'Add Patient' options. The main area features a 'Search Criteria' form with the following fields:

- First Name:
- Last Name:
- Attending Physician:
- Status:
- Buttons: Clear, Search

Below the search criteria is a table of search results:

Patient Information	Attending Physician	Status	Action
Andersson, Benny 09 May 1963 Clinic Patient ID: Baxter Patient ID: O-08503-1000032	Dr. Patel, Abigail	Active	Edit
Campbell, William 25 January 1960 Clinic Patient ID: Baxter Patient ID: O-08503-1000029	Dr. Patel, Abigail	Active	Edit
Lyngstad, Frida 12 June 1964 Clinic Patient ID: Baxter Patient ID: O-08503-1000033	Dr. Patel, Abigail	Active	Edit
Taylor, Drake 28 February 1961 Clinic Patient ID: Baxter Patient ID: O-08503-1000030	Dr. Patel, Abigail	Active	Edit
Wang, Carrie 04 April 1962 Clinic Patient ID: Baxter Patient ID: O-08503-1000031	Dr. Patel, Abigail	Active	Edit

Records 1-5 of 5

2. In the Search Criteria section of the screen, fill in the fields with the user's information. You do not have to enter information in every field.
3. Click **Search**.

All patients at your center that match the criteria you entered will appear in the Patient Information section of the screen.

10.3 Adding a Patient

To add a patient in the Sharesource portal:

1. Click the **Patient Administration** tab.
2. In the Patients secondary navigation menu, click **Add Patient**.

The screen where you can add a patient will appear.

The screenshot shows the 'Add Patient' form in the Sharesource portal. The form is titled 'Patient Information' and 'Primary Address'. It contains several required fields marked with an asterisk: Salutation (dropdown), First Name, Last Name, Middle Name, Date of Birth (DD Month YYYY) (dropdowns), Clinic Patient ID, Baxter Patient ID (with a note: 'This is the Baxter ERP number used for supply ordering. If unavailable, Sharesource will generate a number for this patient.'), Scheduled Start Date (DD Month YYYY) (dropdowns), and Status (dropdown). There is also an 'Attending Physician' dropdown. At the bottom, there are 'Cancel', 'Next', and 'Review' buttons.

3. In the **Patient Information** tab, enter the patient's information.

Required fields are:

- First Name
- Last Name
- Date of Birth (DD Month YYYY)
- Status
- Attending Physician

If Other is selected from the Attending Physician drop-down list, you must supply a first and last name for that attending physician.

Click **Next**.

10. Patient Administration

4. In the **Primary Address** tab, enter the patient's contact information.

The screenshot shows a web application interface for patient administration. At the top, there is a navigation bar with tabs for Clinical, Reports, Clinic Settings, Patient Administration (selected), and Users, along with a Help icon. Below this is a sidebar with a 'Patients' section containing 'Patient Search' and 'Add Patient' buttons. The main content area is titled 'Primary Address' and contains a form with the following fields: 'Address Line 1' (required), 'Address Line 2', 'City' (required), 'State/Province Region' (required), 'Country' (required, dropdown menu), and 'Postal Code'. A 'Phone Number' field is also present, with a note to include the area code. At the bottom of the form are 'Previous', 'Cancel', and 'Review' buttons.

Required fields are:

- Address Line 1
- City
- State/Province Region
- Country
- Phone Number (Digits only - for example 1112223333)

- After entering information in both tabs, click **Review**, and a screen where you can review the patient's information will appear.

Please review the following information before submitting.

Patient Information

Patient Name:	Jenkins, John	Baxter Patient ID:	---
Date of Birth:	30 November 1986	Status:	Active
Clinic Patient ID:	---	Attending Physician:	Dr. Patel, Abigail
Scheduled Start Date:	---		

Primary Address

Patient Address:	1234 Main St.	Country:	United States
City:	Chicago	Postal Code:	60625
State/Province Region:	IL	Phone Number:	7735551212

Back Submit

- If you need to change any of the information, click **Back**.
- If the information is correct, click **Submit** and a green check mark and a confirmation message will appear at the top of the screen telling you that the patient's information has been successfully submitted.

10.4 Editing a Patient's Information

To edit a patient's information in the Sharesource portal:

- Click the **Patient Administration** tab.
The Patient Search screen will appear.
- In the Search Criteria section of the screen, fill in the fields with the user's information. You do not have to enter information in every field.
- Click **Search**.
All patients at your center that match the criteria you entered will appear in the Patient Information section of the screen.
- Click **Edit** in the Action column of the patient's record you want to edit.
The Patient Details screen for the selected patient will appear.
- There, perform your edits, click **Review**, and, if the information is correct, click **Submit**.
A green check mark and a confirmation message will appear at the top of the screen telling you that the patient's information has been successfully submitted.

10. Patient Administration

User Management – Setting Up the Dialysis Center

11

11.1 Overview

This section describes how to add users to the **Sharesource** portal, assign roles and responsibilities to them, and manage user accounts.

11.2 Assigning Users

A Baxter administrator will set up the dialysis center in the **Sharesource** platform and create at least one Clinic Administrator account. Clinic Administrators have the Clinic User Manager role. They can add additional users at the dialysis center and decide what type of roles to assign them. Roles are divided into five categories: Clinic User Manager, Basic Clinical Access, **Homechoice Claria** Device Manager, Patient Manager, and **Homechoice Claria** Clinical Settings Manager. Users who have Basic Clinical Access permissions have the ability to view patient information, including treatment information, device settings, and reports.

➤ **NOTE:** The **Users** tab is displayed only for those who have Clinic Administrator access.

The device-specific permissions available in the **Sharesource** portal are:

- **Homechoice Claria** Device Manager
- **Homechoice Claria** Clinical Settings Manager

See [Table 11-1](#) for a complete explanation of the privileges allowed for those roles.

11.2.1 Adding a New User

Only those with the Clinic User Manager role can add new users to the **Sharesource** portal for your dialysis center.

To add a new user to the *Sharesource* portal:

1. Click the **Users** tab.
2. From the Clinic Users secondary navigation menu, click **Add User**.

The **User Information** tab will appear.

The screenshot shows the 'Add User' form in the Sharesource portal. The form is titled 'User Information' and contains several input fields. Required fields are marked with an asterisk: Email Address, Confirm Email Address, First Name, Last Name, Phone Number, and Language. Optional fields include Middle Name, Alternate Phone Number, and Salutation. A 'Verify' button is next to the email fields, and a 'Next' button is at the bottom right. A 'Cancel' button is at the bottom left. The form is set against a blue header with 'Users' selected and a sidebar with 'Add User' highlighted.

3. Type in the Email Address and enter the same information in Confirm Email Address
4. Click **Verify**

The **Sharesource** portal searches the database for the email address provided.

If the email address does not exist, other user information fields are enabled.

Type in the user information.

Required:

- First Name
- Last Name
- Phone Number
- Language

Optional:

- Middle Name
- Alternate Phone Number

– OR –

11. User Management – Setting Up the Dialysis Center

If the email address exists, the following fields are populated with the information available in the data base.

- First Name
- Last Name
- Phone Number
- Language

Type in the User information.

Optional:

- Middle Name
- Alternate Phone Number

5. Click **Next**.

If it is an existing user, a pop up window will appear asking if you want to edit the information for that user.

The **Site Access** tab screen will appear.

The screenshot shows the 'Users' tab in the software interface. The 'Site Access' tab is active, and the 'User Information' tab is also visible. The 'Site Access' tab contains a list of roles with checkboxes for selection. The roles are categorized into 'Device Specific Roles' and 'Administrative Roles'. The 'Device Specific Roles' include 'Basic Clinical Access', 'Homechoice Claria Device Manager', and 'Homechoice Claria Clinical Settings Manager'. The 'Administrative Roles' include 'Clinic User Manager' and 'Patient Manager'. The 'Basic Clinical Access' role is selected. The 'Homechoice Claria Device Manager' and 'Homechoice Claria Clinical Settings Manager' roles are also selected. The 'Clinic User Manager' and 'Patient Manager' roles are selected. The 'Next' button is visible at the bottom right of the form.

6. Select the permissions to assign to the new user for your center. Users can have multiple roles and access to different dialysis centers.

11. User Management – Setting Up the Dialysis Center

The roles that can be assigned are as follows:

- Basic Clinical Access
- **Homechoice Claria** Device Manager
- **Homechoice Claria** Clinical Settings Manager
- Clinic User Manager
- Patient Manager

7. Click **Next**.

8. Enter your password at the Password Confirmation screen and click **Submit**.

The system assigns the permissions to the new user.

The **Patient Access** tab will appear.

9. Select the patient access type. You can change this setting at any time if you want to authorize the user to view more patients or completely remove access. The types available are:

- No Patient Access
- All Patients
- Limited Patients

10. If Limited Patients is selected, an Add Patients link will appear.

The screenshot displays the 'Users' management interface. The top navigation bar includes 'Clinical', 'Reports', 'Clinic Settings', 'Patient Administration', 'Users', and 'Help'. A sidebar on the left shows 'Clinic Users' with options for 'User List', 'User Search', and 'Add User'. The main content area is titled 'Patient Access' and shows 'You are editing the user John Jenkins:'. Below this, there are three radio button options for patient access types: 'No Patient Access', 'All Patients', and 'Limited Patients'. The 'Limited Patients' option is selected, and a red arrow points from it to an 'Add Patients' link. Below the radio buttons is a table with columns: 'Name', 'Date of Birth', 'Clinic Patient ID', and 'Remove Access'. The table currently shows 'No Records Found'. At the bottom of the form, there are 'Previous', 'Cancel', and 'Submit' buttons.

11. User Management – Setting Up the Dialysis Center

11. When clicked, a screen will appear where you can search for or select from a list of patients the current user is allowed to access.

You are editing the user John Jenkins:

Patient Search Criteria

First Name Last Name

Clinic Patient ID

Select	Name	Date of Birth	Clinic Patient ID
<input type="checkbox"/>	Andersson, Benny	09 May 1963	
<input type="checkbox"/>	Campbell, William	25 January 1960	
<input type="checkbox"/>	Lyngstad, Frida	12 June 1964	
<input type="checkbox"/>	Taylor, Drake	28 February 1961	
<input type="checkbox"/>	Wang, Carrie	04 April 1962	

Records 1-5 of 5

After selecting the patients, click **Submit** and the patients' names will appear on the **Patient Access** tab.

12. Click **Submit** and a confirmation screen will appear telling you the user's information has been successfully submitted.

11.2.2 Roles and Permissions

The **Sharesource** portal allows only those with the Clinic User Manager role to add new users and assign access. Your dialysis center may choose to add multiple users with the Clinic User Manager role depending on the needs of your dialysis center. [Table 11-1](#) shows the permissions for each of the available roles.

► **NOTE:** Patient Manager permissions may not apply to your dialysis center. Only dialysis centers with integrated supply ordering will have access to these permissions.

Table 11-1. Roles and Permissions

ROLE	PERMISSION
Device Specific Roles	
Basic Clinical Access	Ability to view patient information, including treatment information, device settings, and reports.
► NOTE: Basic Clinical Access may not be removed from users with device-specific roles.	
Homechoice Claria Device Manager	Ability to create and edit device settings.
Homechoice Claria Clinical Settings Manager	Ability to create and edit device templates and flag rules.
Administrative Roles	
Clinic User Manager	Ability to create and edit dialysis center user accounts.
Patient Manager	Ability to create and edit patient records.

11.2.3 Searching for a User

To search for a user’s information in the *Sharesource* portal:

1. Click the **Users** tab.
2. From the Clinic Users secondary navigation menu, click **User Search**.
3. Fill in the fields in the Search Criteria section of the screen with the user’s information. You do not have to enter information in every field.

Email Address (Username)	Name	Role	Status	Actions
clinicuser01@gmail.com	Mulowski, Eva	Basic Clinical Access Homechoice Claria Device Manager Homechoice Claria Clinical Settings Manager Clinic User Manager Patient Manager	Active	Edit Reset Password
clinicuser02@gmail.com	Rivera, Noah	Basic Clinical Access Homechoice Claria Clinical Settings Manager	Active	Edit Reset Password
clinicuser03@gmail.com	Nylund, Sophie	Basic Clinical Access Clinic User Manager	Active	Edit Reset Password
clinicuser04@gmail.com	Davis, Adam	Clinic User Manager Patient Manager	Active	Edit Reset Password
clinicuser05@gmail.com	Watson, Sarah	Basic Clinical Access Homechoice Claria Device Manager Homechoice Claria Clinical Settings Manager	Active	Edit Reset Password

Records 1-5 of 5

4. Click **Search**.
All users at your center that match the entered criteria will appear.

11.2.4 Updating a User's Information or Site Access

To update a user's information in the *Sharesource* portal:

1. Click the **Users** tab.
2. From the Clinic Users secondary navigation menu, click **User List**.
3. Locate the user in the User List.
4. Click **Edit** in the Actions column.

The selected user's **User Information** tab will appear.

The screenshot shows the 'Users' tab selected in the top navigation bar. On the left, the 'Clinic Users' menu is open, with '> User Details' selected. The main content area displays the 'User Information' tab for a user named 'Eva Mulowski'. The form includes the following fields: First Name (Eva), Last Name (Mulowski), Middle Name (empty), Salutation (Dr.), Email Address (clinicuser01@gmail.com), Phone Number (855-422-9837), Alternate Phone Number (empty), and Language (English (American) - English (American)). A red arrow points to the 'Next' button, and a 'Submit' button is also visible.

5. Update any of the user's information that has changed.
6. If you are finished making edits, click the **Submit** button. If you need to edit information in the other tabs, click **Next**.

The updated information is linked to the user in the **Sharesource** portal.

To update the user's site access:

1. Click the **Users** tab.
2. From the Clinic Users secondary navigation menu, click **User List**.
3. Locate the user in the User List.

11. User Management – Setting Up the Dialysis Center

4. Click **Edit** in the Actions column.
5. When the selected user's information appears, click the **Site Access** tab.
6. Check or uncheck the roles that you want the user to have:

- Basic Clinical Access
- **Homechoice Claria** Device Manager
- **Homechoice Claria** Clinical Settings Manager
- Clinic User Manager
- Patient Manager

7. Click **Submit**.

If **Homechoice Claria** Device Manager, **Homechoice Claria** Clinical Settings Manager, or Clinic User Manager is selected, the Password Confirmation screen will appear.

8. At the Password Confirmation screen, enter your password and click **Submit**.

The updated site access for your dialysis center is linked to the user in the **Sharesource** portal.

- **NOTE:** Users cannot add or remove dialysis center associations from the **Sharesource** portal. Contact Baxter Technical Assistance to add or remove dialysis center associations from the **Sharesource** portal.

11.3 Removing and Managing Users

When a Baxter representative first sets up your dialysis center in the **Sharesource** platform, a healthcare professional at your center is added with the Clinic User Manager role. This person can then add or remove additional users and determine which permissions each user will have.

Table 11-1 shows the permissions for each of the available roles.

11.3.1 Removing a User from the Dialysis Center

To remove a user from the **Sharesource** portal:

1. Click the **Users** tab.
2. From the Clinic Users secondary navigation menu, click **User List**.
3. Locate the user you want to remove from the User List.
4. Click **Edit** in the Actions column.

The selected user's information page will appear with the data that was last saved.

5. Click **Remove User**.

The screenshot shows the Sharesource portal interface. At the top, there are navigation tabs: Clinical, Reports, Clinic Settings, Patient Administration, and Users. The Users tab is selected. On the left, there is a secondary navigation menu with options: Clinic Users, User List, > User Details (selected), User Search, and Add User. The main content area displays the 'User Information' form for a user named John Bogart. The form includes the following fields: First Name (John), Last Name (Bogart), Middle Name (empty), Salutation (dropdown menu), Email Address (clinicuser05@baxter.com), Phone Number (5553121212), Alternate Phone Number (empty), and Language (English (American) - English (American)). A red arrow points to the 'Remove User' button located at the top right of the form. Other buttons include 'Cancel', 'Next', and 'Submit'.

A confirmation screen will appear.

6. Click **Yes** to remove the user.

– OR –

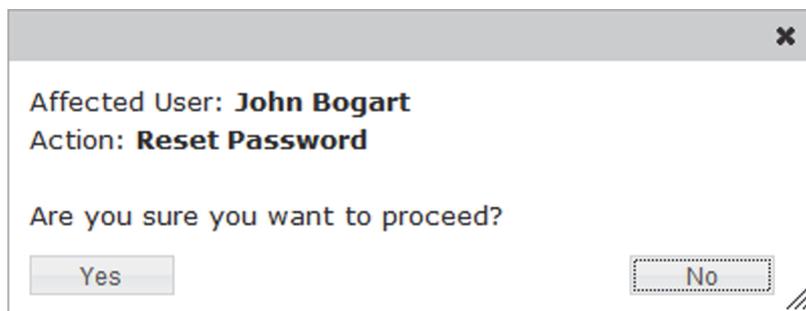
Click **No** to return to the User Details screen without removing the user.

11.3.2 Resetting a User's Password

To reset a user's password from the *Sharesource* portal:

1. Click the **Users** tab.
2. Click **User List** in the Clinic Users secondary navigation menu.
3. Select the user whose password needs resetting.
4. Click **Reset Password** in the Actions column.

A confirmation screen will appear.



5. Click **Yes** to reset the password.

– OR –

Click **No** to return to the User List screen without making changes to the user account.

11. User Management – Setting Up the Dialysis Center

11.3.3 Roles and Responsibilities

This section describes the level of access for each role within the **Sharesource** portal. The roles within this application are described in [Table 11-2](#) and [Table 11-3](#).

Table 11-2. Roles and Responsibilities Legend

VALUE	ACCESS LEVEL	DETAILED DESCRIPTION
	Complete Access	Ability to view content; ability to create/edit content where applicable.
	Read-Only Access	Ability to view content; no ability to create/edit content where applicable.
	No Access	No ability to view content; no ability to create/edit content where applicable.

Table 11-3. Roles and Responsibilities Matrix

PORTAL COMPONENT	BASIC CLINICAL ACCESS	HOMECHOICE CLARIA DEVICE MANAGER	HOMECHOICE CLARIA CLINICAL SETTINGS MANAGER	CLINIC USER MANAGER
Dashboard				
Reports				
Templates				
Users				
Patient Treatment History Report				
Patient Clinical Data Report				
Prescribed Versus Actual Report				
Treatment Flag and Events Report				
Treatment Summary Report				
Clinic Treatment History Report				
Patient Snapshot				
Treatment Summary				
Device Programs				
System Settings				
Patient Settings				
Device Program Confirmation				
System Settings Confirmation				
Patient Settings Confirmation				
Device Settings List				
Device Programs Template				
System Settings Template				
Patient Settings Template				
Device Templates List				
Flag Rules				

11. User Management – Setting Up the Dialysis Center

Table 11-3. Roles and Responsibilities Matrix (continued)

PORTAL COMPONENT	BASIC CLINICAL ACCESS	HOMECHOICE CLARIA DEVICE MANAGER	HOMECHOICE CLARIA CLINICAL SETTINGS MANAGER	CLINIC USER MANAGER
Clinic User Information				
Clinic User Roles				
Clinic User Patient Access				
Clinic User Search				
Clinic User List				
User Creation Confirmation				
Forgot Password - Enter Email				
Forgot Password - Enter Security Answer				
Create Password and Security Question				
Change Password				
Account Settings				
Change Username				
Change Name				
Edit Preferences				
Login				
Help				
Contact Us				
Help & FAQs				
Privacy Policy/Terms and Conditions				

11. User Management – Setting Up the Dialysis Center

12

Frequently Asked Questions

12.1 Getting Help

1: How do I get help with issues or report problems in the *Sharesource* platform?

- 1: Click the **Help** button in the upper right corner of the display. When clicked, a screen listing available user manuals for your particular region will appear.
- 2: Contact Baxter Technical Assistance. Contact information is located in the Contact Us link in the footer of the **Sharesource** portal.

12.2 Accessing the *Sharesource* Portal

1: Why can't I log in to the *Sharesource* portal?

- 1: You may not be connected to the Internet. Try going to a site that you know is updated frequently, such as a news site. If you cannot access the site, or if the site does not look like it has been updated, you may not be connected to the Internet. Call your IT department for assistance.
- 2: You may have entered the **Sharesource** portal website incorrectly. Depending on your region, go to the **Sharesource** portal login screen. Refer to [Table 12-1](#) to see the website for your dialysis center's region.

Table 12-1.Regions and Websites

REGION	WEBSITE
Asia Pacific	https://apac.sharesource.com (South Korea) https://kr.sharesource.com
Canada	https://ca.sharesource.com
China	https://sharesource.cn
Europe	https://eu.sharesource.com
Latin America	https://la.sharesource.com

12. Frequently Asked Questions

Table 12-1.Regions and Websites (continued)

REGION	WEBSITE
North America (United States)	https://na.sharesource.com

If this does not work, contact your local Baxter Clinical Consultant. Contact information is located in the Contact Us link in the footer of the **Sharesource** portal.

- 3: You may not have a **Sharesource** portal account. Check with your dialysis center administrator to confirm that you have a **Sharesource** portal account.
- 4: You may have entered your login ID incorrectly. Your login ID should be the email address the **Sharesource** portal uses to send you email notifications. Try re-entering your login ID. If you still cannot access the **Sharesource** portal, contact your dialysis center administrator.
- 5: You may have entered an incorrect password. If you have forgotten your password, click on the Forgot Password link and follow the instructions. After 5 attempts, your account will be locked. If you are locked out, contact your dialysis center administrator to reset your password. A new password must meet the following requirements:
 - Password must have a minimum of 8 alphanumeric characters
 - Password must have at least 1 numeric character, 1 lower case alphabet character and 1 upper case alphabet character
 - Password cannot contain first name, last name or a part of the user name
 - Password cannot be the same as the last 4 passwords

2: Why doesn't the **Sharesource** portal recognize my account?

- 1: Your account has been disabled because it has been inactive for more than 90 days. Ask your dialysis center administrator to enable your account.
- 2: Your account has been deactivated because it has been inactive for more than 180 days. Ask your dialysis center administrator to reactivate your account.

3: What should I do if I get an error notification?

- 1: If you get a browser error notification or a Windows error message, contact your dialysis center's IT department.
- 2: If the **Sharesource** platform sends you an error notification, contact Baxter Technical Assistance.

12.3 Treatment Dashboard Questions

1: How soon can I view patient data after treatment?

- 1: After a treatment, the next time the patient turns the machine on, the treatment data from the dialysis device automatically uploads to the **Sharesource** portal and is available for viewing. The time taken will vary, depending on connection speeds and the amount of information to be transferred (under normal circumstances, within 30 minutes of turning the power on). Prior to the first treatment, the patient must activate the device by entering their Patient Activation Code to connect the device to the **Sharesource** portal.

2: Why don't I see a patient's data?

- 1: You may have selected the wrong dialysis center. Go to the top of the screen, locate your username, and open the drop-down list to view a list of dialysis centers. Select your dialysis center from the list. The patient data for your dialysis center will appear on the Dashboard.
- 2: You may need to change your filter settings. Check your filter settings to make sure you have not filtered out the patient.
- 3: The patient has become inactive. Inactive patients are not listed on the Dashboard; however, they will be listed on any reports you generate.

3: Why don't I see patients listed on the Treatment Dashboard?

- 1: Either the patient hasn't received treatment in the past 28 days or you may not have permission to view patient information. Ask your dialysis center administrator to give you viewing permission.

4: Why don't I see any data for a survey question (e.g., weight or blood pressure) in the Patient Snapshot or Treatment Summary?

- 1: If no patient-generated data appears, it is because the patient did not enter the information into the device. Ask the patient to enter this data before receiving future treatments. Data for past treatments cannot be entered.

12. Frequently Asked Questions

5: Why don't I see any patient data for certain days?

- 1: A treatment was not performed on that day or was not performed using a device linked to the **Sharesource** portal. The No Treatment Data icon will appear.
- 2: The data transmission link is down, as indicated by the No Communication icon. Notify the patient immediately. Once the link is re-established, the data will appear in the **Sharesource** portal.

6: Why have the flags for one or more of my patients changed?

- 1: Flag rules are set at the dialysis center level. If the flag rule settings have changed, the changes will be applied to all patients associated with the dialysis center retroactively.

7: Where can I go to set or change my dialysis center flag rules?

- 1: Click the **Clinic Settings** tab. Click **Flag Rules** from the secondary navigation menu. Click **Homechoice Claria** and then click **View** to view the current flag rules or **Edit** to edit the current flag rules. Please note that you need **Homechoice Claria** Clinical Settings Manager access to change flag rules.

8: Why can't I submit a form or continue to the next screen when I click "Next?"

- 1: A required field may be missing or an entry is invalid on one of the tabs. Each tab that needs to be fixed is marked with a red X. Navigate to the tab that needs correction by clicking the **Next** or **Previous** buttons. Once there, the screen will identify the field(s) that needs to be fixed with a red field.
- 2: The Device Program name may be too long. Device Program names are limited to 10 characters.

12.4 Data Capture Questions

1: Can I print copies of a screen or reports?

- 1: Yes, you can print copies of a screen or reports.
 - To print copies of a screen:
 1. Select File > Print in the browser menu bar.
 2. Enter the printer setup information and print the information.

— To print multi-page reports:

1. Click the **Reports** tab in the **Sharesource** portal to open the Report Dashboard screen.
2. Enter the report criteria in the appropriate fields and select a file format (PDF or spreadsheet, as applicable).
3. Click **Generate**. When the report appears, move your cursor towards the bottom of the screen and click the printer icon.
4. When the Print display appears, enter the printer setup information and print the report.

2: To print a patient's Treatment Summary, click the PDF icon  located in the upper right corner of the Treatment Summary screen.

➤ **NOTE:** To view PDFs, you must have Adobe Reader installed on your computer. For instructions on how to install a free version of Adobe Reader, go to <http://get.adobe.com/reader/>.

2: I am unable to print. What should I do?

1: Contact your IT team and request a software update. Your computer may not have drivers for the printers on your network or it may not be connected to the printer. The **Sharesource** platform does not include embedded printer drivers.

12. *Frequently Asked Questions*

Index

A

Abdominal
 discomfort 1-4
 fullness 1-1
Activation
 email 5-2
 link 5-2
Active Device Program 1-1
Add a patient 10-3
Additional Information 2-3
Adjust Dwells 7-6
Automated peritoneal dialysis
 Automated APD 1-1
Available annotations 6-8

B

Baxter clinical support 4-6
Baxter technical support 4-6
Blood pressure
 diastolic 1-1
 systolic 1-1

C

Caution symbol 2-4
CCPD
 Continuous Cycling Peritoneal Dialysis 1-1
 Hi-Dose 1-3
CE mark 2-4
Concentration
 last fill 1-5
 night 1-6
Constipation 1-1
Continuous Ambulatory Peritoneal Dialysis
 CAPD 1-1
Cycle 1-2
Cycle profile chart 6-8
Cycler 1-2

D

Day fill volume 1-2, 7-6

Day therapy 1-2, 7-6
Day/Manual UF 6-5
Designating an active program 7-2
Device program settings 7-6
Device Settings icon 2-3, 6-2
Dextrose 1-2
 concentration 7-13
Dialysis 1-2
Dialysis solution 1-2
Drain 1-2
 full 1-2
 initial 1-4
 initial volume 1-4
 volume 1-2
Dwell 1-3
 time 1-3

E

Editing a patient's information 10-5
Error message 2-2
Exchange 1-3

F

Fill
 first 1-3
 last 1-5
Fill volume 1-3
Flag rule settings
 modifying 9-15
 viewing 9-15
Fluid overload 1-3
Flush before fill 1-3
Full drain 1-2

G

Glossary 1-1
Glucose 1-3
 concentration 7-13

H

Hemodialysis 1-2
Hi-Dose CCPD 1-3, 7-4
Hi-Dose therapy 1-3
Hi-Dose tidal 1-3, 7-5
High drain 1-3
High priority flag 2-2

I

I-Drain volume 1-4
Increased intraperitoneal volume (IIPV)
 IIPV 1-4
Indications for use 4-1
Initial drain 1-4
Initial Drain Bypass 1-4
Initial Drain time 1-4
Initial Drain Volume 1-4
Intermittent peritoneal dialysis (IPD) 1-4, 7-4
Intraperitoneal volume (IPV) 1-4

L

Last fill 1-4
 concentration 1-5
 manual drain 1-5
 manual drain alarm 1-5
 manual drain UF target 1-9
 volume 1-5
Locking settings 7-2
Logging in 5-1
 initial login 5-2
 returning user 5-3
Logging out 5-5
Low recirculation volume APD set with
 cassette 1-5
Low recirculation volume set 1-5
Low-Fill Mode 1-5

M

Manual drain 1-5
Manual exchange 1-5
Manufacturer symbol 2-4
Minimum drain volume 1-5
Minimum drain volume percentage 1-5
Mode
 Low-Fill 1-5
 Standard Fill 1-8

Modem 1-6
Multiple (3+) treatments 2-2

N

Navigation 4-3
Night concentration 1-6
Night cycle UF 1-6, 1-9
Night UF 6-5
Nite (night)
 therapy time 1-6
No Communication 2-2
No flow 1-6
No Treatment Data 2-2
Number of day cycles 1-6
Number of manual exchanges 1-6

O

OptiChoice 1-3, 7-3, 7-4, 7-5
Overfill 1-1, 1-4, 1-6

P

Password
 changing 5-9
 forgot 5-3
 logging in after resetting 5-14
Patient activation code (PAC) 1-6
Patient Clinical Information screen 6-4
Patient list filters 6-3
Patient search 6-11
Patient settings 7-11
Patient Snapshot 1-6, 6-4
Patient Snapshot icon 2-3, 6-2
PD
 Peritoneal dialysis (PD) 1-7
Phase 1-2, 1-7
Pre-Blood Pressure 1-7
Pre-Weight 1-7
Priming 1-7
Priority flag 2-2
Pushback 1-7

R

Resetting a user's password 5-13
Roles and Responsibilities 11-6

S

Searching for a patient 10-2

Settings

Device Program

settings tab 7-8

tidal tab 7-8

time tab 7-6

volume tab 7-6

patient

blood pressure 7-11

weight 7-11

system

language 7-14

temperature, fluid 7-14

weight units 7-14

Sharesource connectivity platform 1-7

Slow flow 1-8

Solution bags 1-8

Standard Fill Mode 1-8

Success message 2-3

Symbols

used in the Sharesource portal 2-1

used in this guide 2-4

System settings 7-14

T

Therapy types 7-3

CCPD 7-4

Hi-Dose 1-3

Hi-Dose CCPD 1-3, 7-4

Hi-Dose tidal 1-3

Intermittent peritoneal dialysis (IPD) 7-4

Tidal 1-3, 1-8, 7-5

Tidal 7-5

Tidal drain volume 1-8

Tidal fill volume 1-8

Tidal Peritoneal Dialysis (TPD) 1-8

Tidal therapy 1-3, 1-8

Tidal volume

percent 1-8

Total Cycle UF 1-9

Total night UF 1-8

1-9

Total therapy volume 1-8

Treatment Completed 2-1

Treatment Dashboard 6-1

Patient Clinical Information screen 6-4

patient list filters 6-3

Patient Snapshot 6-4

Treatment summary 6-7

Treatment Progress icons 6-1

Treatment Reviewed 2-3

Treatment Summary 6-7

U

Ultrafiltration (UF) 1-9

night cycle UF 1-9

UF per cycle 1-9

Updating your account settings 5-6

changing your email address 5-10

changing your email preference 5-11

changing your language 5-11

changing your name 5-8

changing your password 5-9

changing your primary clinic 5-11

changing your security question 5-11

V

Volume

day fill 1-2

drain 1-2

fill 1-3

increased intraperitoneal 1-4

initial drain 1-4

intraperitoneal 1-4

Tidal 1-8

total 1-8

total therapy 1-8

W

Warning symbol 2-4

Warnings 3-1

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