

Intermediate Rules Virtual Program for Instrument Manager

Course Description

This is an intermediate level program with a high degree of interaction and collaborative work with fellow participants. There will be extensive hands on practice to learn Instrument Manager Rules engine functionality and construction of rules for auto-verification (AV) of patient results. The class covers data elements for special purposes, calculations, AV rules, best practices, complex functions, and SM Workspace integration.

Prerequisites

Participants must understand laboratory workflows and operation of Laboratory Information Systems for transmission of orders and receipt of results from laboratory instrument interfaces. Prior attendance in a Data Innovations Introduction to Rules course or equivalent training, plus at least six months experience writing rules in Instrument Manager is required. Prior to registering for a class, participants must successfully complete a Rules competency quiz.

Course Agenda

Day One

Overview of Rule Writing

- Data Flow Overview
- Rule Writing and Message Types
- Streamlining Rules

Operators, Actions, and Data Elements Review

- Extract Component of vs. Extract Section of
- Previous Run Result vs. Previous Result
- Specimen Indices and Assigning User Fields

Rules Testing

- Best Practices for Dry Testing Rules
- Importing Test Cases from Patient Records

Day Two

Data Element User Fields

- Cross Analyzer Calculations
- Multiple Runs

AV Rules Introduction

- Missing Indices

AV Rule Sets

- What is AV?
- Validation
- Implementation and Approval Documentation
- Naming Rules and Test Scenarios/Test Cases

Day Three

Data Collection for AV

- Typical data used in AV rule sets
- Sample spreadsheets for data collection & use in rules writing

Converting Workflows to Rule Sets

- Writing and testing rules commonly used in AV sets

Writing AV Rule Set Exercise

- Small group activity to construct and test an AV rule set for sample coagulation workflow

Day Four

Writing AV Rule Set Exercise (continued)

Complex Functions

- Pattern matching
- Specimen Warning

Language Locale

- Renaming User Fields

Non-Default Locations

- Writing rules in alternate places along IM data flow

Exporting Rules

Common Rule Errors