



EE 11.1.26

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# EP Evaluator Release 11.1

## Discover the New Features

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Implementation Consultant

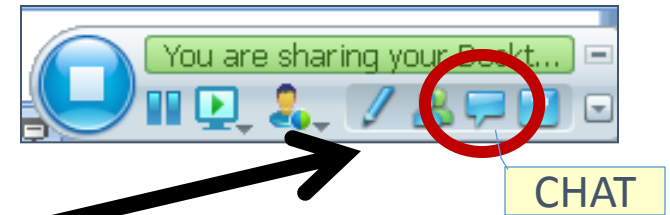
# To ask a question send a Chat

**During the presentation the phone lines will be muted**

**Click the CHAT icon in the WebEx task bar on your desktop.**

**Send a chat question to**

**ALLI KELSO**



# During this webinar we will discuss:

- **Enhancements and Updates from previous versions**
- **Enhancements to the ODBC data acquisition utility**
- **Rapid Results Entry (RRE) enhancements**
- **The NEW Trueness Module to evaluate bias and uncertainty**
- **How to upgrade to the newest release**

# History of EP Evaluator



**1991 - EP Evaluator first introduced**

**Dr. David G Rhoads formed DGRA**

**1991 – 2006 Revisions 1.0 through 7.0**

**20 Stat modules 2 Lab Management**

**2007 - Revision 8 added**

**3 INR modules 1 Lab Management Module**

**2009 - Data Innovations acquired DGRA**

**2010 - EE9 released 28 Stat Modules**

**2012 EE10.0 29 Stat Modules 4 Lab Management**

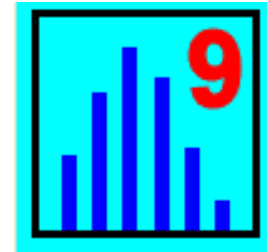
**2013 EE11.0 30 STAT Modules 4 Lab Management**

**2014 - EE11.1 - enhancements**

# Key updates Release 9

## Release 9

- Simple Accuracy using target values from 2 levels
- Linearity by CLSI EP6 polynomial assessment
- Stability
- Histogram and Descriptive Stats.
- Competency Assessment LM Module
- Ability to capture data from IM using ODBC



# Key Updates in Release 10

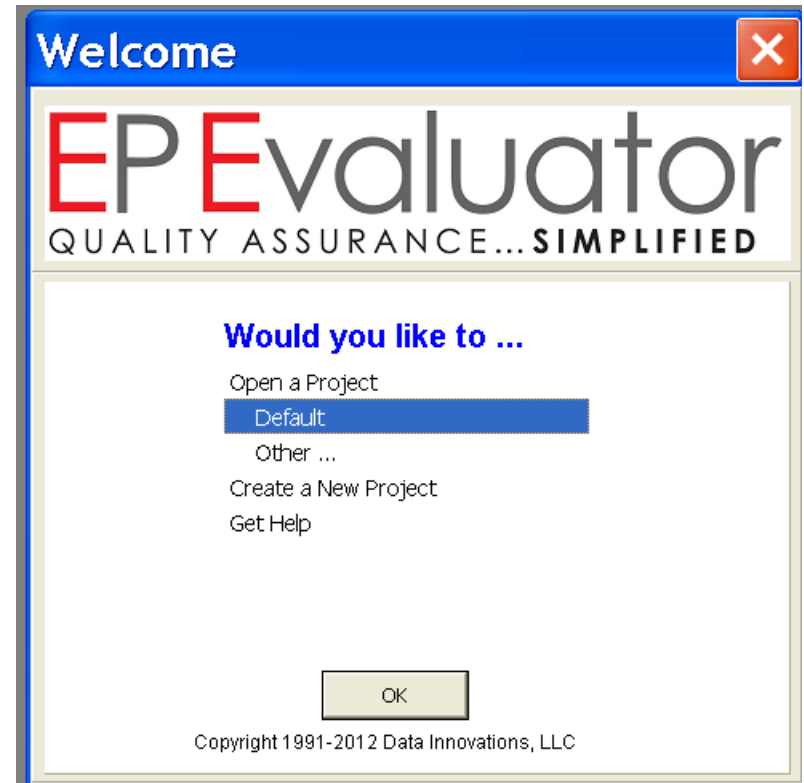
**New Logo, New Look**



**Factor Sensitivity Module**

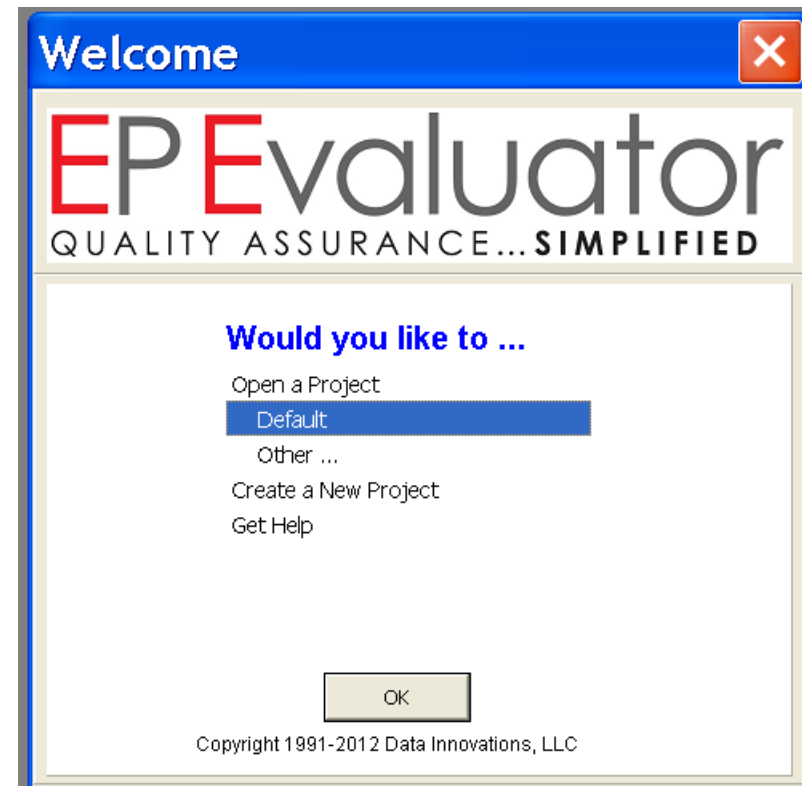
**Composite Reports**

**Globalization – Phase 1**  
**French Language**



# Key Updates in Release 11.0

- **Trueness Module**
- **WAC and unlock codes**
- **RRE enhancements**
- **Fixed a few**

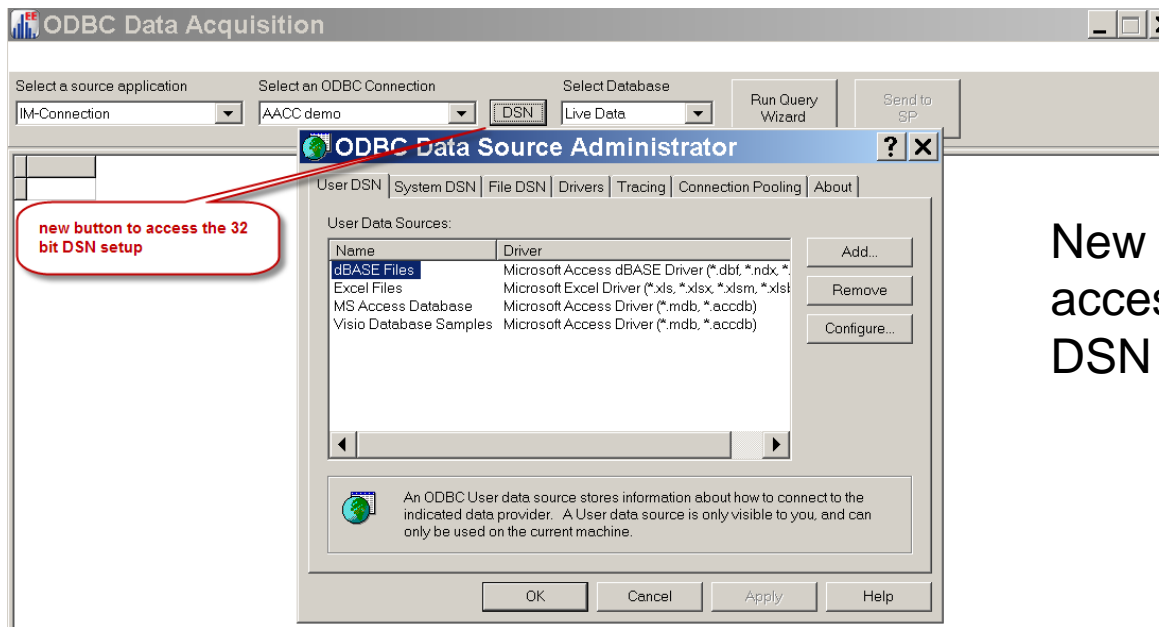
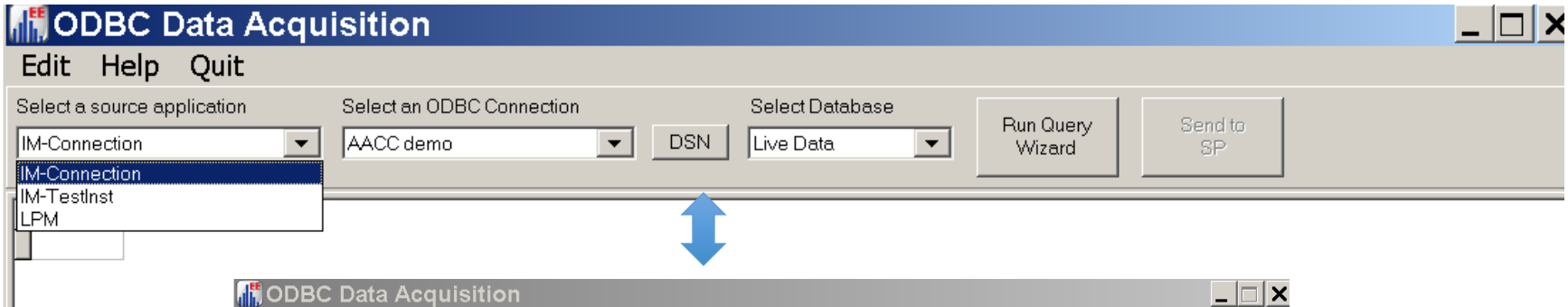


# Enhanced ODBC Data Acquisition (ODA)

- **Data can be acquired from both IM and LPM**
- **Queries optimized for larger databases = FASTER!!**
- **No longer requires Write access to the Registry**
- **Easier to set up ODBC Data Source Name (DSN) on a 64 bit computer**
  - **EE is a 32 bit application and uses 32-bit DSNs**
  - **New button on ODA pops up correct 32-bit DSN manager**
- **Now can use either System or User DSNs**



# New ODA screen



New DSN button to access the 32 bit DSN setup

# Initial Global DB Query filter:

## Date Range and Result filters now include QC data

EP Evaluator Simple Precision [Example Policies]

File Edit Module Experiment RRE ERI View Utilities Tools Help

Create Experiments  
ODBC Data Acquisition  
Define Policies

Project- Example Policies

Simple Precision

Instrument

ODBC Data Acquisition

Edit Help Quit

Select a source application Select an ODBC Connection Select Database

IM-Connection EE to IM DSN Live Data Run Query Wizard Send to SP

ODBC Data Acquisition Query Wizard

Global Filters  
Select a range of Observation Times

Observation Date Range

Starting at 4/2009 10:11:47

Ending at 10/25/2013 11:02:00

Other Global Filters

Only Released Results  
 Only Results With No Error Flags  
 Only QC Results

Select finite date range

Legend

- Not Calculated
- Insufficient Data
- Sufficient data
- Fail
- Pass
- May need review

Connected

< Back Next > Cancel

# RRE Copy/Paste Enhancements

- **RRE process for CP, LOQ and EP10 has changed to better accommodate data sourced from instrument, middleware or LIS generated files.**
- **TestDate and TestTime are required fields**
- **Times are required for CP, LOQ and EP10**
  - **For LOQ in particular, times may no longer be entered as free text ("morning") but rather must be legal times ("1:00 AM").**
- **A Complex Precision experiment can now be created with retrospective daily QC data**
  - **Too many / too few reps and runs are now flagged and excluded.**

# RRE Copy/Paste Details

- **The EE\resources folder has several example spreadsheets to assist in formatting your data for copy/paste into the Module Overview screen to create new experiments.**
  - **Paste With Policies, List**
  - **Paste With Policies, Table**
- **Incorrectly formatted data is Handled more gracefully**
- **Activity log**
  - **Warning messages help users detect data problems immediately.**
  - **Activity log can be saved**

# Misc changes

- **CP: In CP Policies, Modules and Options: If you set PrelimSDSrc to a value other than Calc, you no longer need to also set PrelimSDCount to zero**
- **Preferences can be saved to a file, (Preferences.ini) and are automatically sent with a Bug Report.**
- **Linearity: Some reports failed to show some graphs that appeared in the Details screen. Note that where 5 graphs appear in the Details screen, only 4 graphs will appear in the Reports.**
- **Fully documented PDFrelease notes on website.**



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# What's new in EE 11.1?

EE11.1.26 - released April 2014

# Highlights 11.1

- Each time EE starts, it verifies that the permissions are correct for writing files and writing to the registry
- Most EE screens can be resized and positioned to suit the user. The Print Preview screen will continue to appear full screen.
- **Method Comparisons**
  - Modules 2IC, AMC, CLSI EP9, POC, and QMC Data can be viewed either in SpecID order or in the order originally entered.

# Highlights of EE 11.1 – pg 2

- **The Sigma Calculation was added to the Trueness Module for EQC data**
- **Preferences**
  - Enable a Regression Summary page for Linearity reports with slope, intercept, corr. coeff.
  - Disable the “new Update available” notice
  - Preferences can be saved to a file
- **Merge Project in File menu,**
  - copy experiments from a selected project into the currently open project.
  - Exception HMC experiments



# Highlights of EE 11.1 pg. 3

- **The Factor Sensitivity module has selectable curve fit regressions of logarithmic, or 1<sup>st</sup>, 2<sup>nd</sup>, or 3<sup>rd</sup> order polynomial.**
- **QMC statistics can be selectively enabled**
  - Agreement, McNemar's Test, and Cohen's Kappa
  - The defaults are set in Policies\Modules & Options
  - Checkboxes in the Parameters screen can also customize each QMC experiment.

# RRE, Policies, and Projects

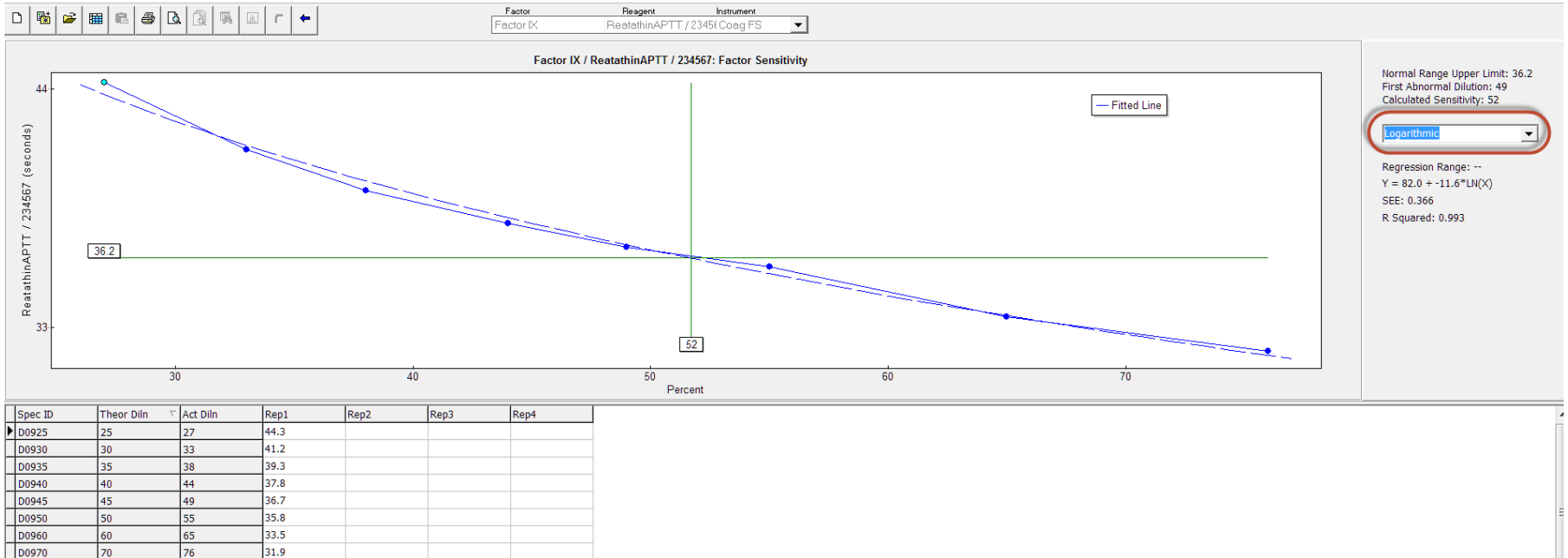
- **RRE and project management**
  - RRE\Lot number database is now searchable and can be sorted by lot #, expiration data, source and comment.
  - RRE edit\paste and import/export will correctly paste data from csv files that have been modified in MS Excel
- **Policies**
  - EE warns if data is too long when being pasted into the Policy forms.
  - The Equivalency Test Code feature (inside RRE > Define Policies > Interface > Combine/Discard) now accepts accept incoming analyte names up to 24 characters to be mapped to a 16 character user defined analyte name .

# Factor sensitivity 11.1 \*

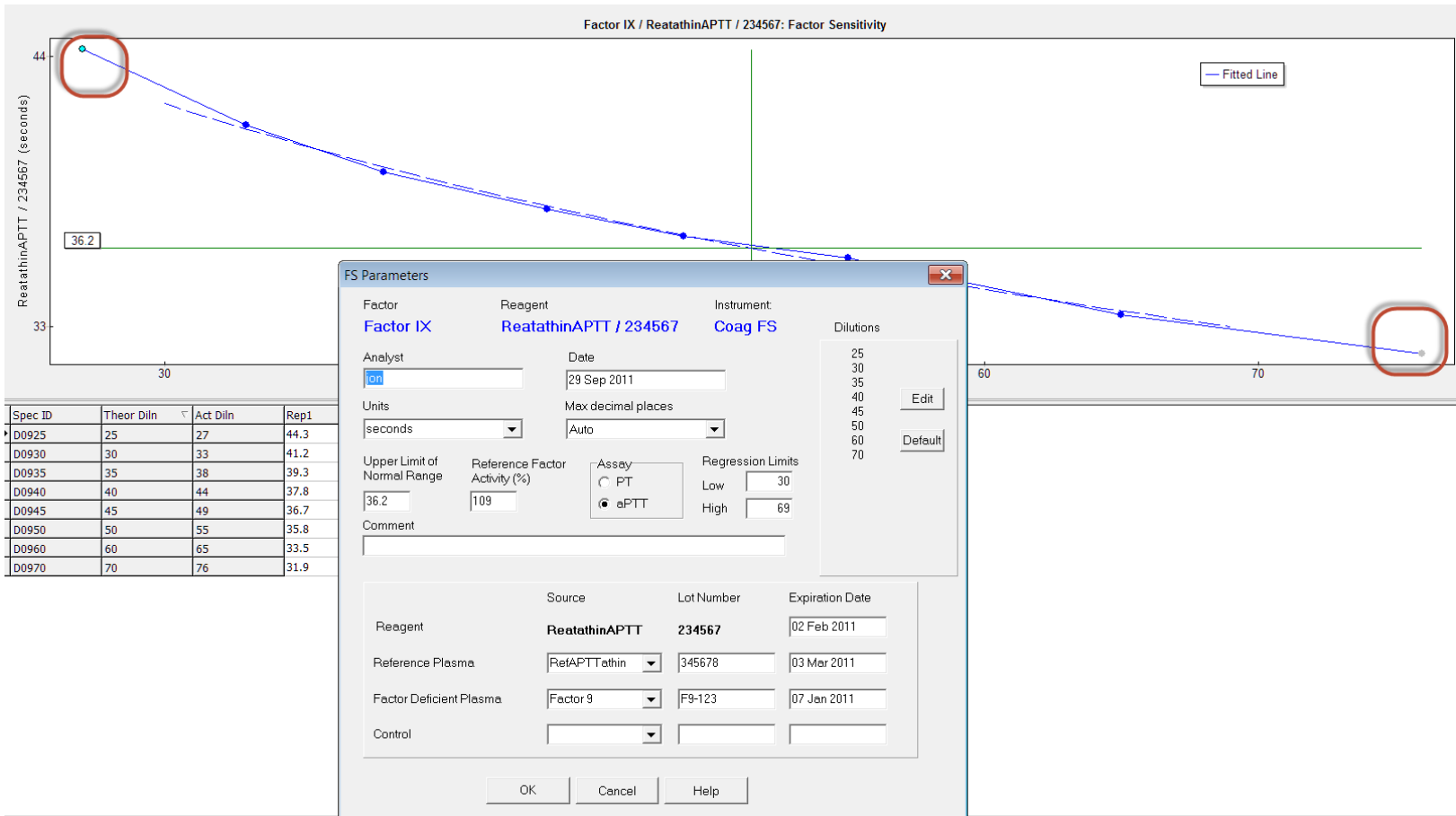
- **Selectable regression polynomials of degree 1, 2, or 3, or a logarithmic curve fit.**
- **Statistics : regression degree, regression polynomial equation, R-squared value, and SEE on the Experiment Detail screen and printed report.**
- **“Regression Limits” option in the parameters screen lets users choose the actual Dilutions to be used in the regression plot.**
- **Dilutions:**
  - **maximum dilution of up to 100% with decimal points allowed.**

**\*See the Factor Sensitivity topics in EP Evaluator Help for more detail regarding these changes.**

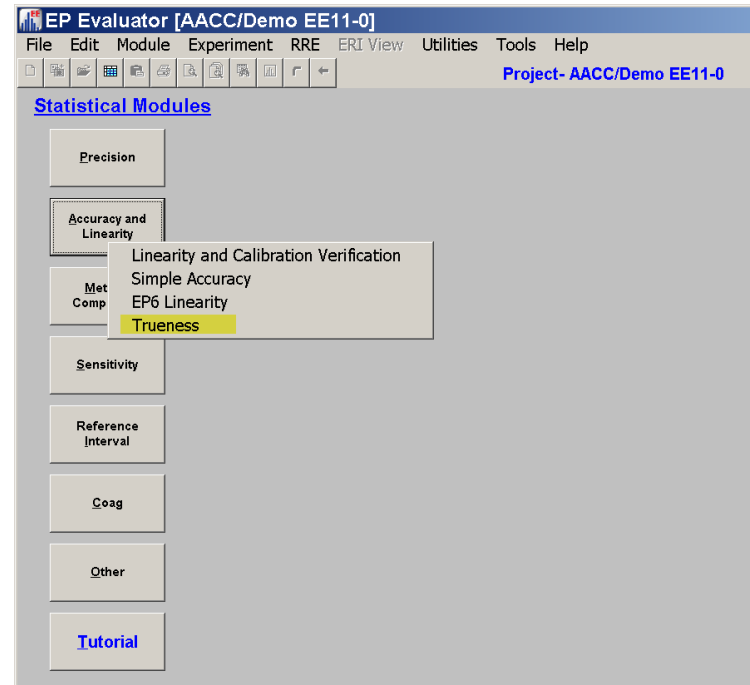
# Factor Sensitivity



# Factor sensitivity Parameters Screen



# Trueness Module



# Module Overview Screen Trueness

EP Evaluator Trueness [Tru/release 35]

File Edit Module Experiment RRE ERI View Utilities Tools Help

Project- Tru/rel

	Measurand	Level	Uncert Abs/%	Lab Mean	%Bias	Passes
▶ ●	Cholesterol	Sample-EQA	0.4/12.5	5.52	1.7/-7.5	No
▶ ●	Cholesterol	Sample-EQC	0.50/9.7	5.470	-0.4/1.3	No

TRU

Method

DxC800 3588

▶ Eximir 100

Report Samples

- All Experiments listed by Method
- Basic stats:
  - Uncertainty
  - Lab Mean and %Bias
  - Pass, fail

# Creating a new Trueness experiment

Click the New Experiment icon , or choose Experiment / New from the Experiment Menu.



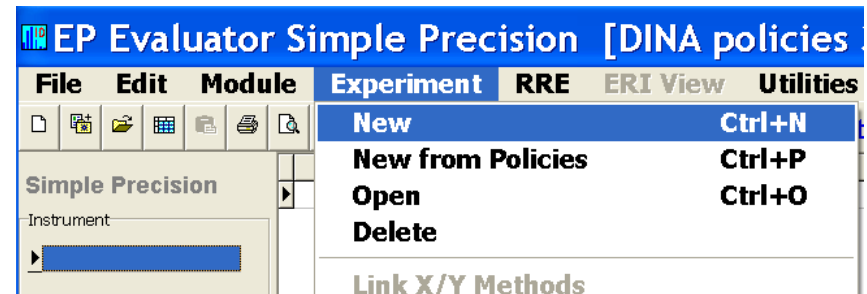
User defined names

Method or instrument name

Measurand name

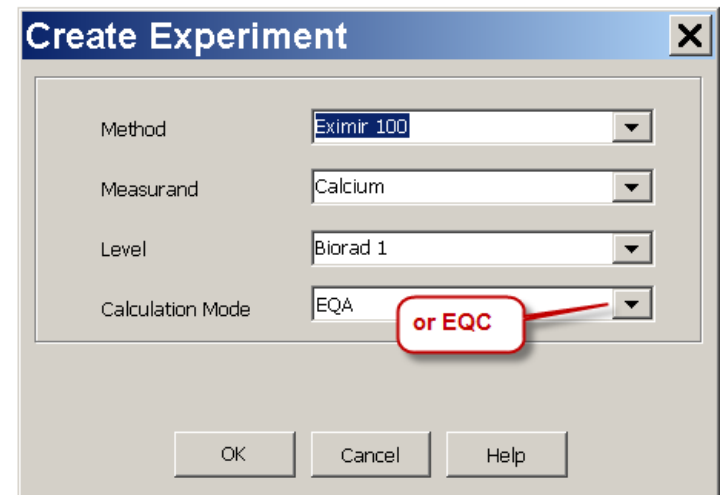
level name

Names entered previously appear in the drop-down items



Choose Calculation mode - EQA or EQC

Click OK to go to Parameters screen





# Parameter screen

- Analytical Goal Mode
- Group Eval Mode
- Enter IQC mean, SD CV%

**Trueness Parameters**

Method <b>Eximir 100</b>	Measurand <b>Calcium</b>	Level <b>Biorad 1-EQA</b>
Analyst CRL	Date 23 Aug 2013	IQC Mean <input type="text"/> SD <input type="text"/> CV <input type="text"/>
Units <input type="text"/>	Max decimal places Auto	<input type="text"/> <input type="text"/> <input type="text"/>
Group Eval Mode <input checked="" type="radio"/> Peer Group <input type="radio"/> All Methods	SD Reliability Threshold 8	<input type="text"/> <input type="text"/>
Analytical Goal Mode <input checked="" type="radio"/> Budget <input type="radio"/> Component <input type="radio"/> Biological Variation <input type="radio"/> %Bias Cutoff	TEa Conc <input type="text"/> TEa Pct <input type="text"/>	Systematic Error Budget <input type="text"/>
<b>Materials</b>		
Reagent	Lot	Source
Calibrators	Expiration Date	
Comment		
OK Cancel Help		

Fields highlighted in yellow are required

enter IQC mean the either SD or CV

# 4 Analytical Goal (AG) mode choices

Analytical Goal Mode

Budget

Component

Biological Variation

%Bias Cutoff

TEa Conc       Systematic Error Budget

TEa Pct      

- Budget (TEA)

Analytical Goal Mode

Budget

Component

Biological Variation

%Bias Cutoff

Bias Conc

Bias Pct

- Component:  
bias conc or %

Analytical Goal Mode

Budget

Component

Biological Variation

%Bias Cutoff

CVi

CVg

Level

Minimal

Desirable

Optimal

Conf Interval

95%

99%

possible source in Tools menu table of Bio Variation

- Biological  
variation

Analytical Goal Mode

Budget

Component

Biological Variation

%Bias Cutoff

%Bias Cutoff

a single user defined  
% Bias

- User Defined %  
bias

# Experiment Detail Screen – EQC data

for each event

Period

Date

Lab Value

Peer mean

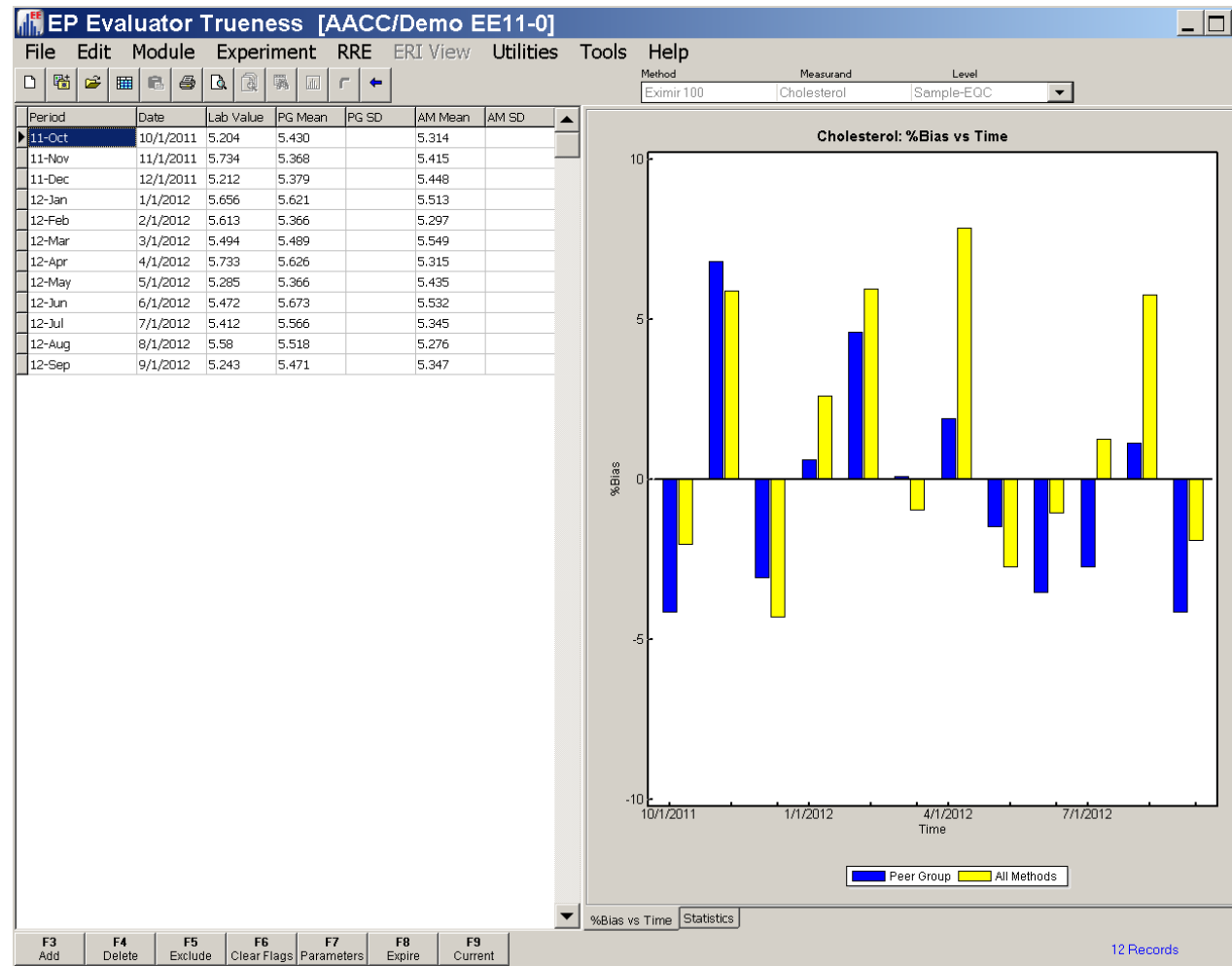
Peer SD

All meth mean

All meth SD

Observed statistics

Tabs for Graphs,  
charts, statistics



# Experiment Detail Screen - EQA data

One row for each comparative event

Data Entry

SpecID

Date

Lab Value

Peer mean

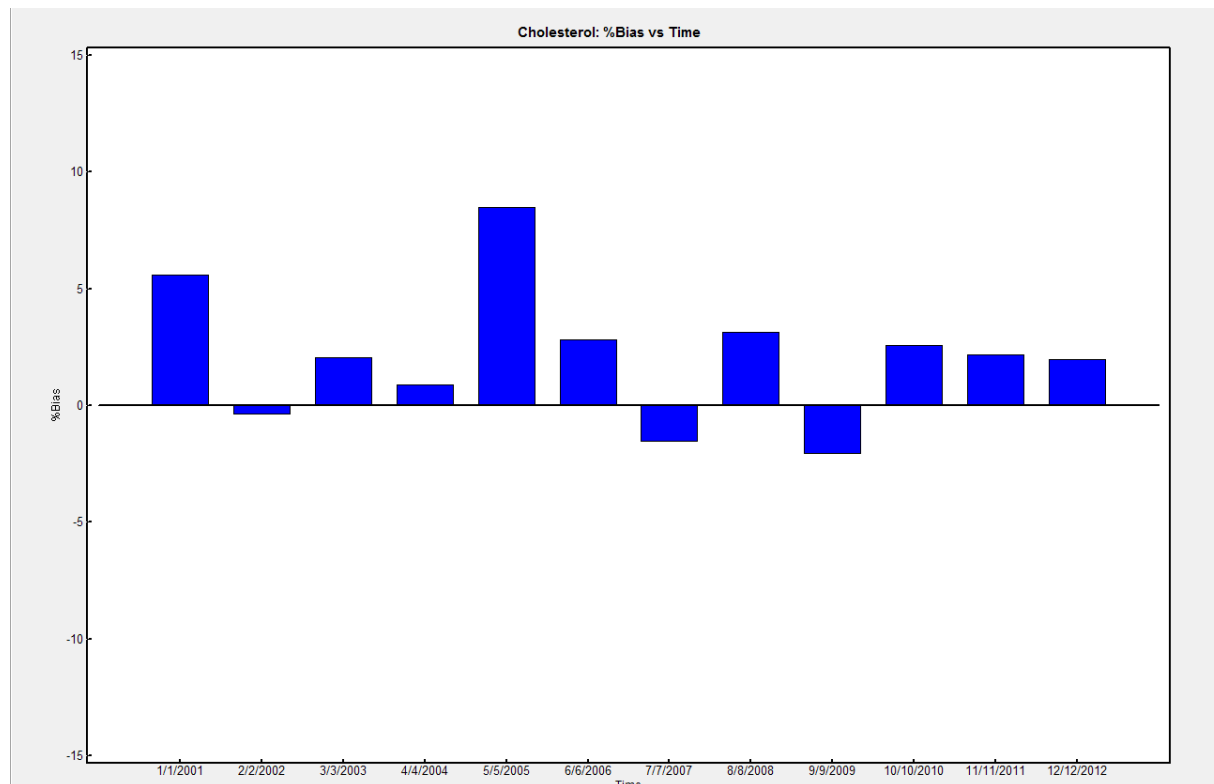
Peer SD

All meth mean

All meth SD

Observed statistics

Tabs for Graphs,  
charts, statistics



# EQC Stats with Sigma

At a value of 5.03 mmol/L, uncertainty is estimated to be 0.5 (absolute) or 9.7% (relative).

Calculated using mean of bias.

The experiment Fails (Maximum %Bias was 6.8).

Sigma: 16.9

Evaluating Peer Group

IQC Mean	5.03
IQC SD	0.151
IQC CV	3

	Mean	Mean %Bias	Mean Bias	Max %Bias
Lab	5.47	--	--	--
Peer Group	5.49	-0.4	-0.02	6.8
All Methods	5.40	1.3	0.07	7.9

N: 12

Period	Date	Excl	Lab		Peer Group				All Methods				Uncertainty	%Bias Cutoff
			Result	SD	Result	SD	%Bias	Passes	Result	SD	%Bias	Passes		
11-Oct	10/1/2011		5.204	0.05	5.430	--	-4.2	Yes	5.314	--	-2.1	--	--	4.5
11-Nov	11/1/2011		5.734	0.03	5.368	--	6.8	No	5.415	--	5.9	--	--	4.5
11-Dec	12/1/2011		5.212	0.04	5.379	--	-3.1	Yes	5.448	--	-4.3	--	--	4.5
12-Jan	1/1/2012		5.656	0.03	5.621	--	0.6	Yes	5.513	--	2.6	--	--	4.5
12-Feb	2/1/2012		5.613	0.05	5.366	--	4.6	No	5.297	--	6.0	--	--	4.5
12-Mar	3/1/2012		5.494	0.02	5.489	--	0.1	Yes	5.549	--	-1.0	--	--	4.5
12-Apr	4/1/2012		5.733	0.015	5.626	--	1.9	Yes	5.315	--	7.9	--	--	4.5
12-May	5/1/2012		5.285	0.02	5.366	--	-1.5	Yes	5.435	--	-2.8	--	--	4.5
12-Jun	6/1/2012		5.472	0.011	5.673	--	-3.5	Yes	5.532	--	-1.1	--	--	4.5
12-Jul	7/1/2012		5.412	0.03	5.566	--	-2.8	Yes	5.345	--	1.3	--	--	4.5
12-Aug	8/1/2012		5.58	0.04	5.518	--	1.1	Yes	5.276	--	5.8	--	--	4.5
12-Sep	9/1/2012		5.243	--	5.471	--	-4.2	Yes	5.347	--	-1.9	--	--	4.5
<b>Means</b>	--	--	<b>5.47</b>	<b>0.03</b>	<b>5.49</b>	--	<b>-0.4</b>	--	<b>5.40</b>	--	<b>1.3</b>	--	--	--

# Trueness Module Key Statistics

- **Accuracy Report using EQA data**
  - Overall bias to peer or all method selected group
  - Overall Uncertainty
  - Specimen uncertainty if selected group reports SD
  - %bias vs selected group
  - %bias vs time for selected group
  - Scatter plot (multiple levels)
  - Uncertainty plot
- **Trueness Report using EQC Data**
  - Overall bias to peer or all method selected group
  - Overall Uncertainty
  - Specimen uncertainty if selected group reports SD
  - %bias vs time for both groups when data available

# Trueness policies tab

Not available in COFRAC or CLIA versions

Visible when Trueness is selected in Modules and Options

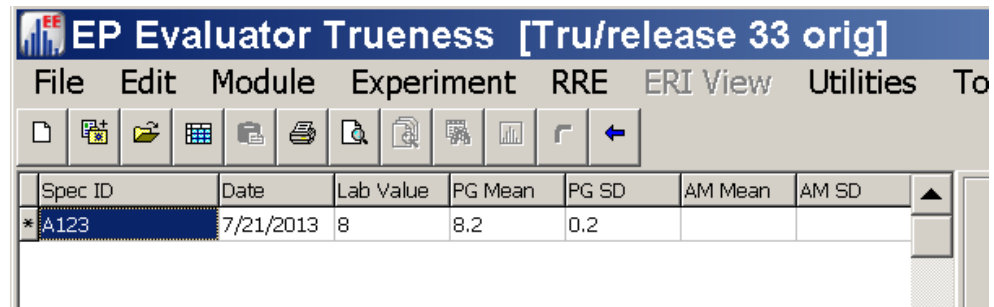
Edit																					
Analyte	BV Conf	Pct Bias Cut	IQC Level 1			IQC Level 2			IQC Level 3			EQA Levels					EQC Levels				
			Mean	SD	CV	Mean	SD	CV	Mean	SD	CV	Level 1 Name	Cutoff	Level 2 Name	Cutoff	Level 3 Name	Level 1 Name	Cutoff	Level 2 Name	Cutoff	Level 3 Name
aPTT																					
Calcium	0	10	7.5	1	13.3	10.8	1	9				Normal	10.5	Abnormal			Normal	10.5	Abnormal		
Glucose		4	60	6	10	115	0.45	3	300	30	10	LOW	70	mid	126	HI	LOW	70	mid	126	HI
INR																					
Prottime																					
Sodium	0	1	130	4	3.1																
T Bili	0	10	1	0.1	10	3.5	0.3	15	10		20	lo	1	mid	5	hi	lo	1	mid	5	hi

- **Group Mode: Peer or All Method**
- **AG mode: %bias, budget of TEA, component, Bio Var.**
- **Up to 3 IQC level means and SD**
- **EQA or EQC cutoffs to define Up to 3 levels**

# Entering Data into Trueness Experiment Detail Screen

2 ways to enter data into the Experimental Detail Screen.

1. Type into cell.



The screenshot shows the 'EP Evaluator Trueness' application window. The menu bar includes File, Edit, Module, Experiment, RRE, ERI View, Utilities, and To. Below the menu bar is a toolbar with various icons. The main data table has the following columns: Spec ID, Date, Lab Value, PG Mean, PG SD, AM Mean, and AM SD. The first row of data is highlighted in blue and contains the following values: \*A123, 7/21/2013, 8, 8.2, 0.2, and empty cells for AM Mean and AM SD.

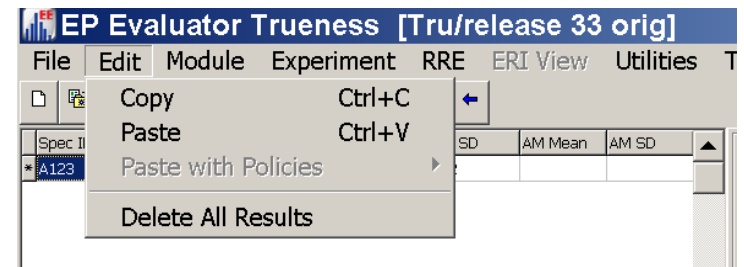
Spec ID	Date	Lab Value	PG Mean	PG SD	AM Mean	AM SD
*A123	7/21/2013	8	8.2	0.2		

2. Paste data from a Microsoft<sup>®</sup> Excel spreadsheet.

**C:\EE11\Resources\PasteExptDetail.xls**

**COPY** from the spreadsheet

**PASTE** into EE using **EDIT \ PASTE**





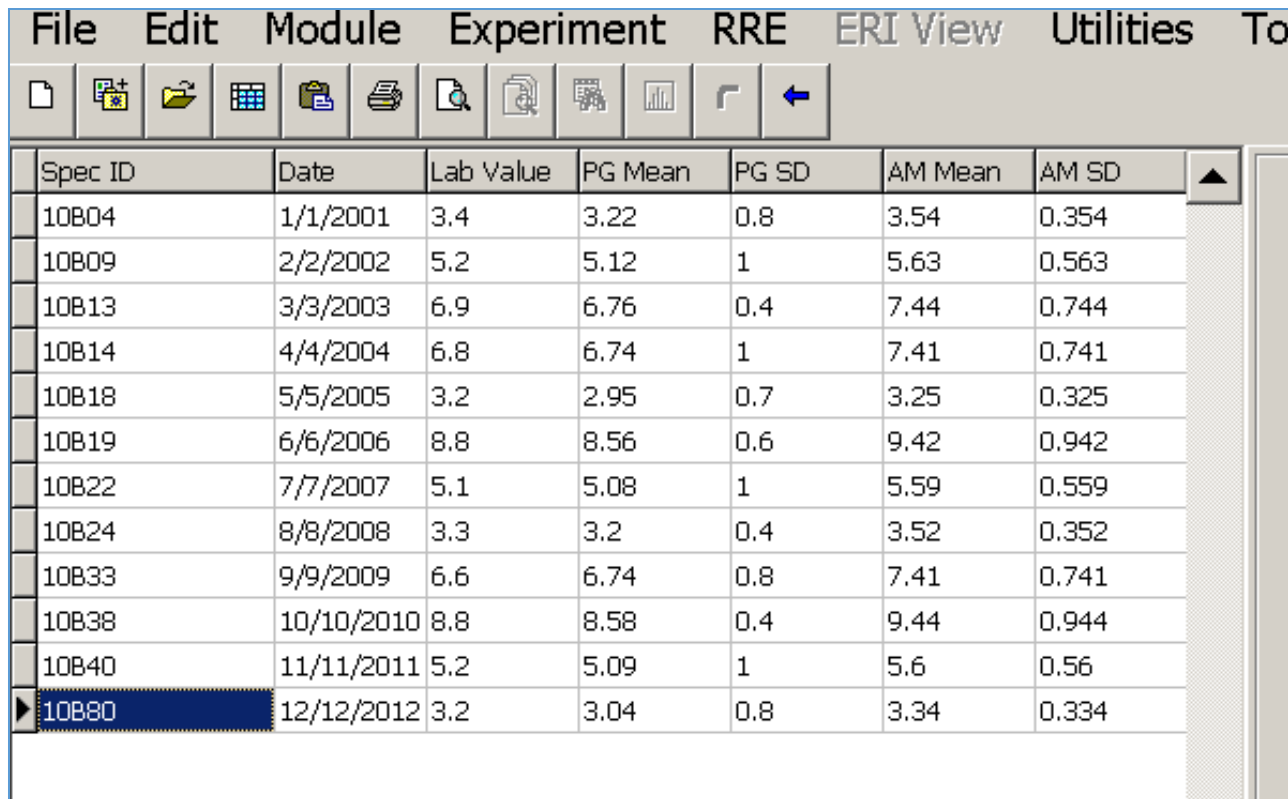
# EE Resources Folder

Annotated examples for RRE techniques are available in your EE\Resources folder are PasteEXPTDetail.xls or RRE Trueness.xls.

Use with the project “Example Policies”.

 ace9-TechNotes.pdf	06/26/2013 11:55 AM	Adobe Acrobat Document	167 KB
 CATExampleQuestions.pdf	10/19/2009 7:59 AM	Adobe Acrobat Document	329 KB
 e9Res-InvMan-Materials-Oct2007.pdf	11/20/2010 12:42 PM	Adobe Acrobat Document	62 KB
 e9Res-LISFormats.pdf	11/20/2010 12:42 PM	Adobe Acrobat Document	92 KB
 e9Res-rreFldCodes.pdf	11/20/2010 12:42 PM	Adobe Acrobat Document	230 KB
 e9Res-rreWsRef.pdf	11/20/2010 12:41 PM	Adobe Acrobat Document	92 KB
 EE9 backup of Example Policies.zip	09/05/2013 7:23 PM	Compressed (zipped) Folder	199 KB
 HMC example.xls	08/07/2012 12:10 PM	Microsoft Excel 97-2003 Worksheet	359 KB
 PasteERIList.xls	06/28/2012 2:41 PM	Microsoft Excel 97-2003 Worksheet	166 KB
 PasteERITable.xls	06/28/2012 2:40 PM	Microsoft Excel 97-2003 Worksheet	195 KB
 PasteExptDetail.xls	10/20/2013 10:32 PM	Microsoft Excel 97-2003 Worksheet	89 KB
 PasteParmsInSS.xls	07/02/2013 6:21 PM	Microsoft Excel 97-2003 Worksheet	223 KB
 PasteWithPoliciesList.xls	04/03/2013 9:31 AM	Microsoft Excel 97-2003 Worksheet	254 KB
 PasteWithPoliciesTable.xls	06/12/2013 10:50 AM	Microsoft Excel 97-2003 Worksheet	184 KB
 Rhoads Suggested Performance Standards.pdf	08/07/2012 1:49 PM	Adobe Acrobat Document	26 KB
 TEASim.exe	10/29/2006 10:43 AM	Application	2,156 KB
 TEASim.hlp	10/29/2006 11:10 AM	Help file	34 KB
 TRU RRE Example.CSV	09/11/2013 1:09 PM	Microsoft Excel Comma Separated Values File	4 KB
 TRU RRE Example.xls	09/05/2013 7:23 PM	Microsoft Excel 97-2003 Worksheet	56 KB

# After pasting



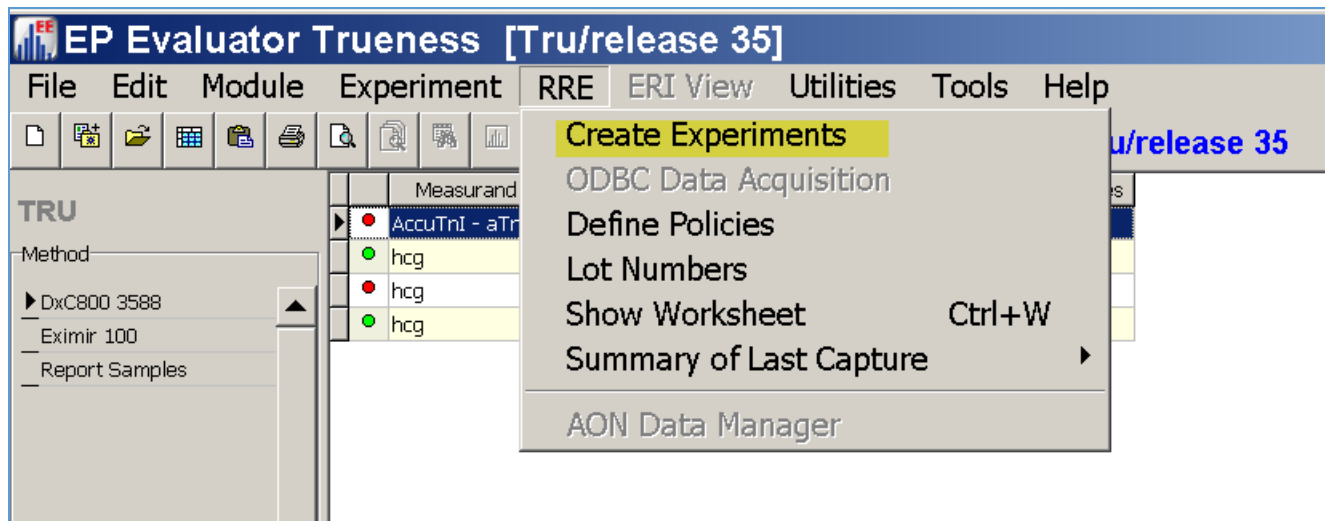
Spec ID	Date	Lab Value	PG Mean	PG SD	AM Mean	AM SD
10B04	1/1/2001	3.4	3.22	0.8	3.54	0.354
10B09	2/2/2002	5.2	5.12	1	5.63	0.563
10B13	3/3/2003	6.9	6.76	0.4	7.44	0.744
10B14	4/4/2004	6.8	6.74	1	7.41	0.741
10B18	5/5/2005	3.2	2.95	0.7	3.25	0.325
10B19	6/6/2006	8.8	8.56	0.6	9.42	0.942
10B22	7/7/2007	5.1	5.08	1	5.59	0.559
10B24	8/8/2008	3.3	3.2	0.4	3.52	0.352
10B33	9/9/2009	6.6	6.74	0.8	7.41	0.741
10B38	10/10/2010	8.8	8.58	0.4	9.44	0.944
10B40	11/11/2011	5.2	5.09	1	5.6	0.56
10B80	12/12/2012	3.2	3.04	0.8	3.34	0.334

# 3<sup>rd</sup> Way to create experiment – RRE-T

## RRE for Trueness

- **Must have policies defined**
- **Can create multiple experiments when the user has spreadsheets containing data from EQC or EQA programs**
- **RRE \ Create Experiment from the Trueness Overview screen**

# Trueness RRE Feature



# Map spreadsheet data to required fields in EE Trueness

The screenshot shows the EE Trueness RRE software interface. At the top, the title bar reads "EE Trueness RRE". Below the title bar, there are several input fields and dropdown menus:

- Input File: C:\Documents and Settings\crllee.DINA\My Documents\EP evaluatc
- Inst Class: (empty dropdown)
- Configuration: try again
- Calc Mode: EQA

The main area of the window contains a data table with the following columns: Measurand, SpecID/Period, Method, Lab Result, PG Mean, PG SD, All Methods Mean, All Methods SD, and Date. The table contains 12 rows of data, including analytes like "Uric Acid" and "ALT".

Measurand	SpecID/Period	Method	Lab Result	PG Mean	PG SD	All Methods Mean	All Methods SD	Date
Analyte	specID	"Method 1"	Result	"peer group result"	"Peer SD"	"All result"	"SD All"	Date
"Uric Acid"	"12 B01"	DXC	6.7	6.81	0.141	6.73	0.257	1/9/2012
"Uric Acid"	"12 B06"	DXC	4.3	4.42	0.101	4.41	0.14	2/13/2012
"Uric Acid"	"12 B10"	DXC	9.7	10.01	0.165	9.94	0.324	3/12/2012
"Uric Acid"	"12 B14"	DXC	3.1	3.2	0.098	3.16	0.111	4/9/2012
"Uric Acid"	"12 B17"	DXC	5	4.94	0.124	4.88	0.155	4/30/2012
"Uric Acid"	"12 B22"	DXC	9.9	10.09	0.188	9.95	0.368	6/4/2012
"Uric Acid"	"12 B27"	DXC	6.9	6.9	0.123	6.78	0.287	7/9/2012
"Uric Acid"	"12 B32"	DXC	4.4	4.48	0.101	4.39	0.15	8/13/2012
"Uric Acid"	"12 B40"	DXC	5	5.01	0.086	4.96	0.183	10/8/2012
"Uric Acid"	"12 B64"	DXC	8.1	8.85	0.153	8.7	0.34	4/9/2012
ALT	"12 B02"	DXC	198	199.5	5.7	0	0	1/16/2012
ALT	"12 B09"	DXC	173	181.4	7.4	0	0	3/5/2012

At the bottom of the window, there are four buttons: Import, Cancel, Setup, and Help.

# Report Summary - Trueness

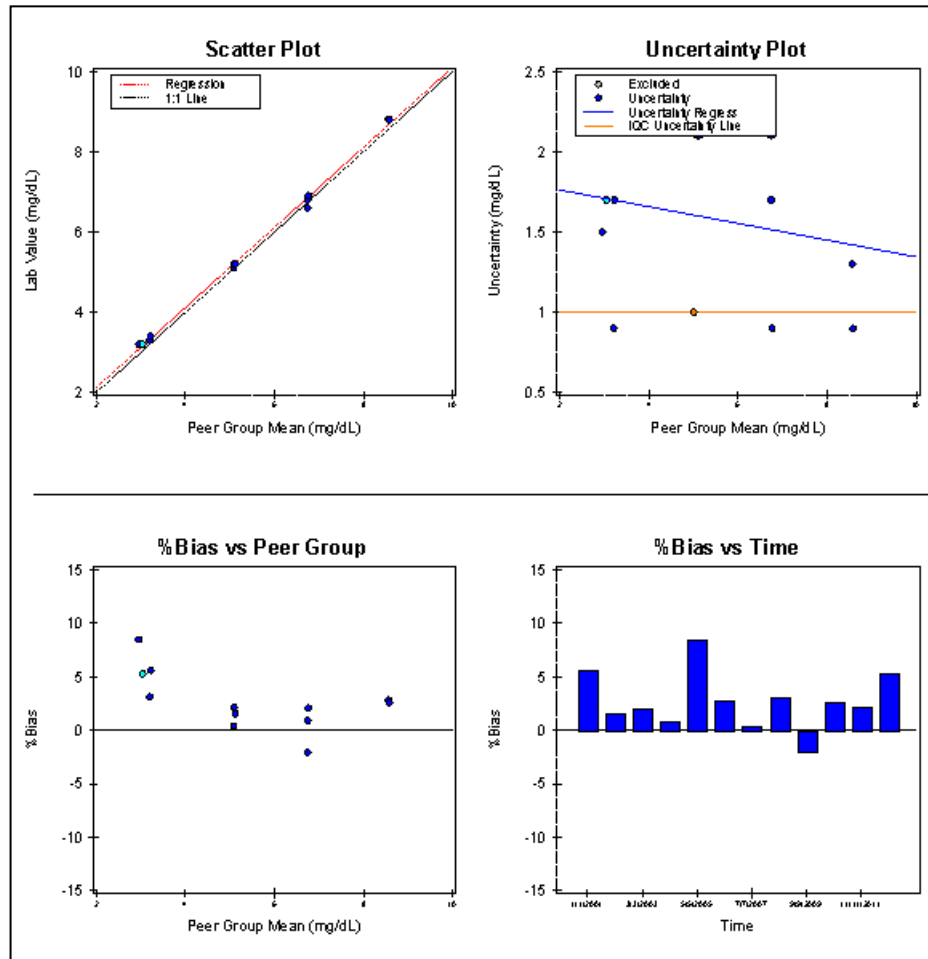
## EP Evaluator<sup>®</sup>

Clinical Laboratory -- Kennett Community Hospital

### Trueness Summary

<i>Method</i>	<i>Measurand</i>	<i>Level</i>	<i>Uncert Abs/%</i>	<i>Lab Mean</i>	<i>%Bias</i>	<i>Passes</i>
DxC800 3588	✗ AccuTnl - aTnl	all-EQA	0.15/29.7	0.501	0.0/--	No
	✓ hcg	1st trimes-EQC	2090/20.9	10279.5	0.0/--	Yes
	✓ hcg	2nd trimes-EQC	21080/21.1	113074.5	0.0/--	Yes
	✓ hcg	3 decimals-EQC	2089.66/20.9	10279.500	0.0/--	Yes
DxC800 5282	✗ Calcium	all-EQA	1.0/18.3	5.54	2.2/-7.1	No
Eximir 100	✗ Cholesterol	Sample-EQA	0.4/12.5	5.52	1.7/-7.5	No
	✓ Cholesterol	Sample-EQC	0.50/9.7	5.470	-0.4/1.3	Yes

# Trueness EQA graphs



# EP Evaluator®

Clinical Laboratory-- Kennett Community Hospital

**Calcium**  
Method DxC800 5282  
Level all-EQA

## Trueness - EQA

At a value of 5 mg/dL, uncertainty is estimated to be 1.0 (absolute) or 18.3% (relative).  
Calculated using mean of bias.

**The experiment Fails (Maximum % Bias was 8.5).**

### Statistical Summary

	Mean	Bias	% Bias	Max % Bias
Lab	5.54	--	--	--
Peer Group	5.42	0.12	2.2	8.5
All Methods	5.97	-0.42	-7.1	-10.9

N: 12

### Supporting Data

Analyst	CRL
Expt Date	22 Aug 2013
Units	mg/dL
Reagent	Bimer 8455 exp 12/31/2009
Calibrator	--
SD Rel Thresh	8 (Calculated using mean of bias)
Comment	

### User Specifications

Group Mode	Peer Group
AG Mode	Biol Var
CV	1.9
Cvg	2.8
Level	Desirable
CI	95%

### IOC Stats

Mean	5
SD	0.44
CV	8.8

### Trueness Data

SpecID	Lab	Peer Group			Pass	All Methods			%Bias		
		Result	SD	%Bias		Result	SD	%Bias	Pass	Cutoff	Uncert
10B04	3.4	3.22	0.8	5.6	No	3.54	0.354	-4.0	--	2.4	1.7
10B09	5.2	5.12	1	1.6	Yes	5.63	0.563	-7.6	--	2.4	2.1
10B13	6.9	6.76	0.4	2.1	Yes	7.44	0.744	-7.3	--	2.4	0.9
10B14	6.8	6.74	1	0.9	Yes	7.41	0.741	-8.2	--	2.4	2.1
10B18	3.2	2.95	0.7	8.5	No	3.25	0.325	-1.5	--	2.4	1.5
10B19	8.8	8.56	0.6	2.8	No	9.42	0.942	-6.6	--	2.4	1.3
10B22	5.1	5.08	1	0.4	Yes	5.59	0.559	-8.8	--	2.4	2.1
10B24	3.3	3.2	0.4	3.1	No	3.52	0.352	-6.3	--	2.4	0.9
10B33	6.6	6.74	0.8	-2.1	Yes	7.41	0.741	-10.9	--	2.4	1.7
10B38	8.8	8.58	0.4	2.6	No	9.44	0.944	-6.8	--	2.4	0.9
10B40	5.2	5.09	1	2.2	Yes	5.6	0.56	-7.1	--	2.4	2.1
10B80	3.2	3.04	0.8	5.3	No	3.34	0.334	-4.2	--	2.4	1.7

X: excluded from calculations

Accepted by: \_\_\_\_\_

Signature

\_\_\_\_\_

Date

EP Evaluator 11.00.07

Tru/release 33 orig P Printed: 22 Aug 2013 23:02:06

Page 1



# WAC or unlock codes for EE 11

WAC codes (web activation codes) and unlock codes obtained by phone or email

Your unlock codes for EE 11.0 have a slightly different format than those for previous releases.

They now display the license expiration date.

They now contain your Customer Number and Asset Number from CRM

Example:

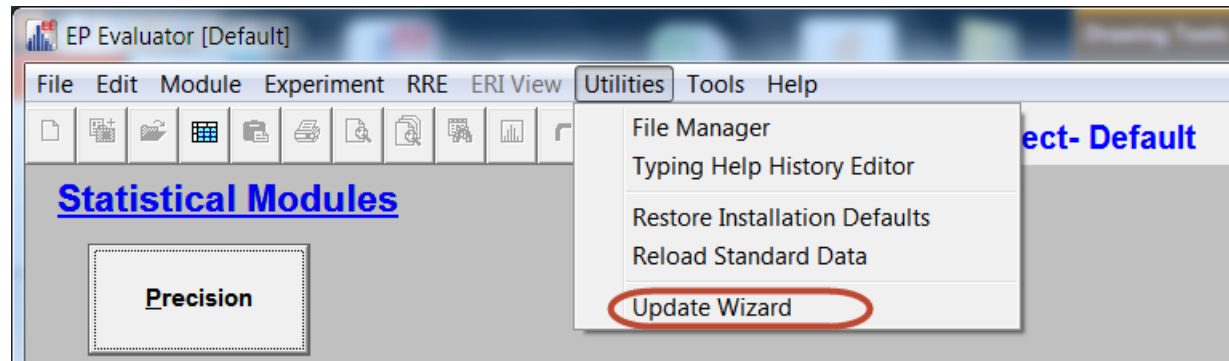
Unlock Code: BP01-0623N345-30SEP2013-12345-67890

WAC: WBBP01-03549E-30SEP2013-123445-67890

12345 is the Asset Number and 67890 is the Customer Number

# Bringing data to EE11.0 from an earlier release.

- Use the Utilities \Update wizard to find studies in your older EE release and add them to EE 11.0



- the Fun Fact and impact: Systems with oodles of studies (= current projects) often take hours to update – when using the Utilities\Update Wizard.

# Updating EE11.0 - Bringing studies from an older release (EE4 – EE10)

## Utilities\ Update Wizard:

The Update Wizard will not automatically overwrite experiments in the newer target database with older experiments of the same name.

Update Wizard

What program are you moving data from?

EE4 or later  
 include "MASTER" project

Incident Tracking

Inventory (SIS)

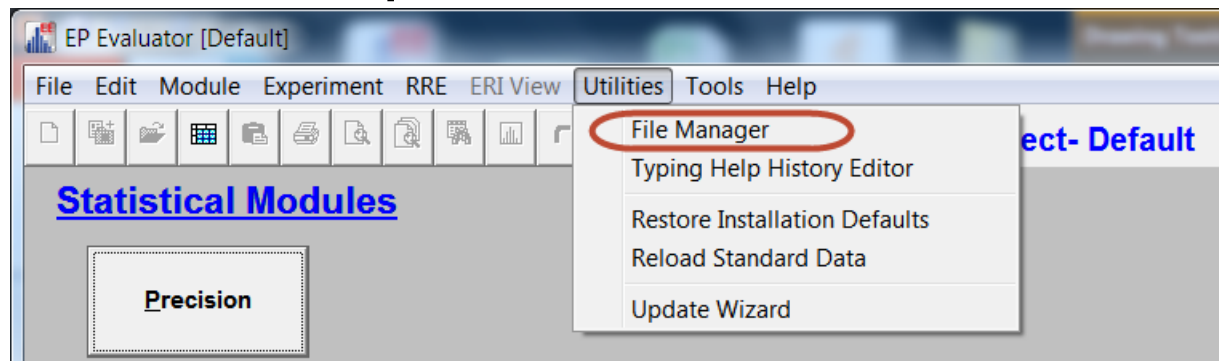
Competency Assessment (CAT)

[To bring data forward from EE-CLIA or earlier, contact Data Innovations, LLC.](#)

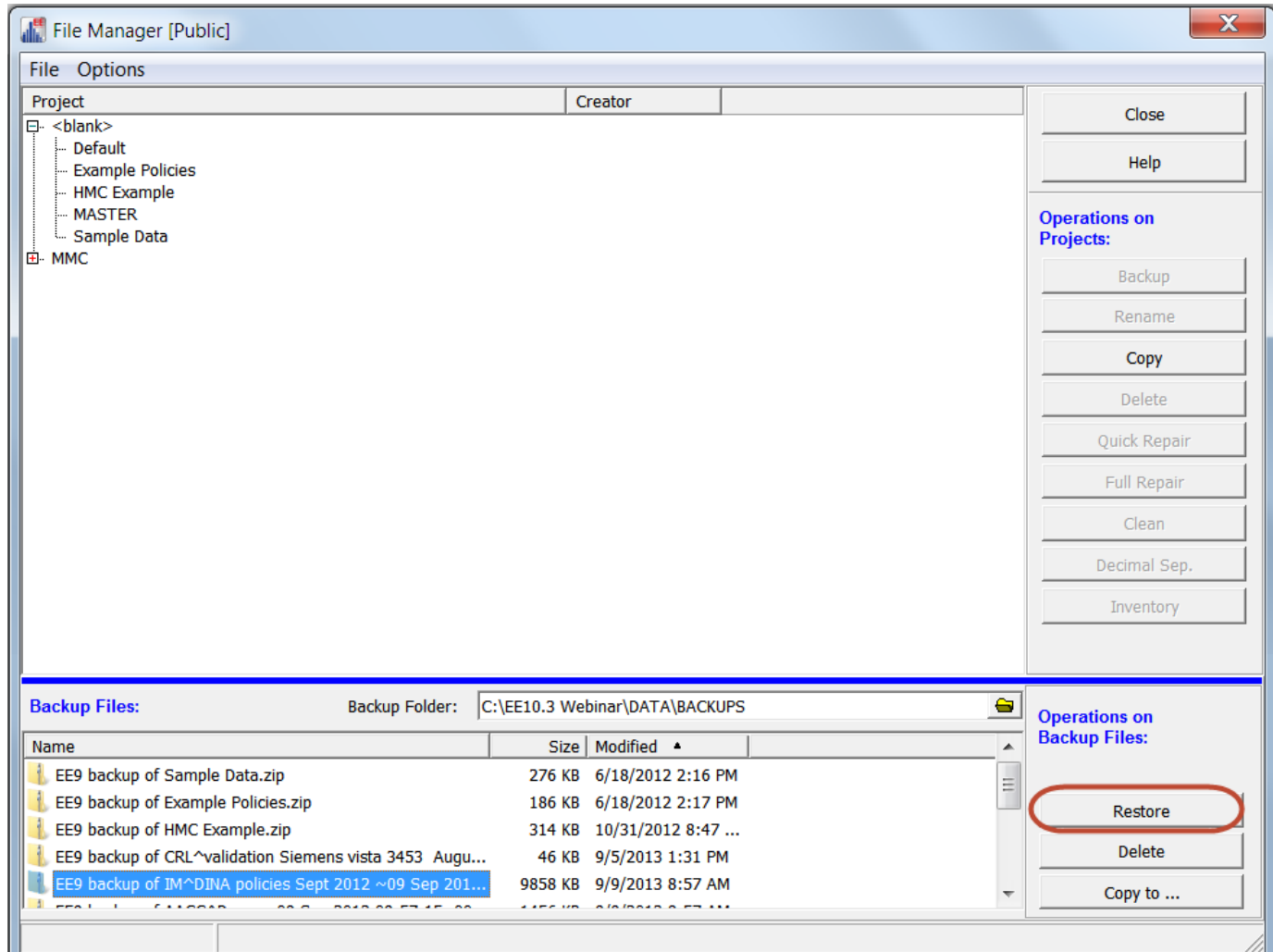
Prev Cancel Help Next ▶

# Bringing data to EE11.0 from an earlier release. We recommend:

- Backup completed studies in the old release Utilities\File Manager
  - Move from EEx\data\backups to EE11.1\data\backups
- Clean up the Data\Studies folder to contain as few “current” studies as necessary.
- Restore backups in EE11.1 when needed.



# Utilities \ File Manager



# The Lab Management Modules

Incident Tracking

Simple Inventory system

Competency Assessment

Cost Per Test

# Incident Tracking Features

**2003, CMS final Rule 42 CFR 482,**

**Requires a “Quality Assessment and Performance Improvement (QAPI) program.**

**The Incident Tracking Database represents the Error Identification phase of a laboratory QAPI program!**

**Multiple user defined databases with security**

**Key incident classifiers**

**pre-analytical, analytical, post-analytical**

**Patient impact, severity, lab functions**

# Incident Tracking Enhancements in EE10 and 11

**ITRAK could contain PHI (Patient Health Information)**

**Improved security permission levels to help protect  
PHI from view by non-authorized users.**

**Special secure Data Entry fields for “investigators” and  
“Closers”**

**All reports can be switched on to view by permission only**



# The EE Product Today

**EE Online web based still only \$1 per experiment report (7 basic modules)**

**EE desktop or network Release 11.0**

**CLIA : 10 basic STAT modules**

**COFRAC – 10 key modules for French regulatory requirements.**

2 projects only

No policy definitions or RRE techniques

# The EE Product Today

## Standard Version

30 modules plus 4 lab management modules

Unlimited projects

Able to define policies and use RRE copy/paste data entry

## Standard + Data Capture

Capture data from middleware IM or LPM with ODBC (Other data sources by contractual arrangement)

IVD Vendors can Capture data from Instruments or instrument generated files

## Professional

Everything plus user security and audit trail

# How to get EE11:

## Download and Install from the Website

- **Anyone: Download and use EE11 trial version for 14 days with no unlock code.**
- **Your earlier version of EE and EE11 are two separate programs, and happily co-exist on the same computer, using different unlock codes.**
- **Free Upgrade for Current subscription users**
  - **download the EE11 trial, and then get a new unlock code. Convert your old projects to EE11 at your leisure. Your old version license expires at the end of its current term.**
- **Customers who purchased (not subscription) EE8 and below will need to generate a Purchase Order PO for a new subscription in order to get an unlock code beyond the 14 day trial**
- **Network server users need to get their IT involved.**
- **Corporate license users need to check with their management to determine their own rollout plan. (but individuals can still view the trial version)**

# For More Information About EE ...

Visit [ee.datainnovations.com](http://ee.datainnovations.com)

**Brochure and price list,**

**Download the current build of EE for a free 14 day trial.**

**Tables of Allowable Total Error**

**[Download the User Manuals in PDF format](#)**

**Register for free EP Evaluator training webinars**

# Documentation and Support

- **Users Guides**
  - the EE manual,
  - Lab Stats Manual.
  - the QuickStart Guide,
- **Download free to Subscription users**
  - [ee.datainnovations.com](http://ee.datainnovations.com) select downloads page and enter your information.
- **PDFs in the physical disk set.**
- **Context sensitive HELP is part of the program.**



The screenshot shows the Data Innovations website with a navigation menu (HOME, ABOUT US, PRODUCTS, SERVICES, SUPPORT, NEWS & EVENTS, CAREERS) and a sidebar menu listing various software products and manuals. The main content area is titled "EP Evaluator" and includes the tagline "QUALITY ASSURANCE...SIMPLIFIED". It provides instructions for downloading the software and accessing documentation and training. The steps are:

- STEP 1: DOWNLOAD EP Evaluator SOFTWARE**  
If you are a registered user, you can download and install the latest version of EP Evaluator.  
[Click Here](#)
- STEP 2: FREE DOCUMENTATION - Where to begin?**  
The EP Evaluator user's manual is available for download to assist you during installation and guide you through the use of EP Evaluator.  
[Click Here](#)
- STEP 3: FREE TRAINING - Want to learn more?**  
Attend one of our Weekly Online Workshops to help you get started. Whether you are new to EP Evaluator or a loyal customer, a variety of Online Workshops are available to provide overview on specific areas of EP Evaluator.  
[Click Here](#)

# Contact us

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**Northamerica-support@datainnovations.com**

**Sales (802) 658-2850**

**Northamerica-sales@datainnovations.com**

# Available EE Webinars

1. **Overview and Efficient use of EP Evaluator: every Thursday**
2. **Rapid Results Entry: 1st Tuesday of each month**
3. **Determining Performance Standards: 1<sup>st</sup> Wednesday of the month**
4. **Simple Inventory System : 2nd Tuesday of each month**
5. **Hematology Method Comparison 2<sup>nd</sup> Wednesday of the month**

to sign up: Register on [ee.datainnovations.com](http://ee.datainnovations.com)

All presentations are at 2 pm Eastern time.