

## Desktop 1.0 User Guide

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## **INTRODUCTION**

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### **ABOUT PATIENT TRACKER DESKTOP**

Patient Tracker Desktop software works in combination with handheld devices running the Windows CE® or PalmOS® operating system and Handheldmed, Inc.'s Patient Tracker software. Patient Tracker enables physicians to receive complete patient chart information remotely, in examining rooms or away from the office, and upload new or changed chart information to the system. Patient Tracker Desktop manages the central database of patient chart data.

### **ABOUT THIS GUIDE**

This user guide is addressed to physicians and staff personnel in offices, clinics, and hospitals who enter patient chart data into the Patient Tracker system at a desktop computer. It provides complete instructions for using the Patient Tracker Desktop software. It does not cover Patient Tracker software installed on handheld devices (for which a separate user guide may be downloaded from [www.Handheldmed.com](http://www.Handheldmed.com)).

It is assumed that readers are familiar with the basic features and operations of the Microsoft® Windows® operating system, and using a mouse.

This user guide is organized into four main sections:

- **Installation.** This section presents the procedure for installing the Patient Tracker Desktop software.
- **Patient Tracker Desktop at a Glance.** This section provides a pictorial orientation to the main user interface features of Patient Tracker Desktop.
- **Using Patient Tracker Desktop.** This section provides explanations and instructions for using the features of Patient Tracker Desktop.
- **Administration.** This section contains instructions for the administrative features of Patient Tracker Desktop.
- **Support.** This section contains contact information for technical support.

## **INSTALLATION**

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This section explains how to install the Patient Tracker Desktop application and *conduit* (synchronization, or sync program) onto your local computer. The Patient Tracker Desktop installation procedure also installs the handheld device portion of the sync software, so that it is ready to be installed onto handheld devices the next time each device is synchronized with the desktop. Instructions are also included for installing the handheld device portion of the sync software onto multiple devices, without having to go through the complete Patient Tracker Desktop installation procedure.

- Patient Tracker Desktop installs Patient Tracker 5.11 on each PDA the first time Patient Tracker Desktop and the PDA are synchronized.

## **SYSTEM REQUIREMENTS**

The computer onto which Patient Tracker Desktop is to be installed must meet the following minimum specifications:

- 32 MB RAM
- 30 MB free hard disk space
- Internet Explorer 3.0 or later
- Any of the following Windows versions:
  - Windows 95
  - Windows 98
  - Windows NT
  - Windows 2000
  - Windows ME
  - Windows XP

Handheld devices running Patient Tracker must meet the following specifications and requirements to be able to synchronize with Patient Tracker Desktop:

	<b>PalmOS</b>	<b>Windows CE</b>
Operating System:	3.0 or later	2.11 or later
Available memory for application:	175KB	750KB
Available memory for patient data:	at least 25KB	

## INSTALLATION AND INITIAL SETUP

In order to install Patient Tracker Desktop onto a desktop computer, you must have already purchased and downloaded the Patient Tracker Desktop 1.0 software from the Handheldmed Web site ([www.handhelmed.com](http://www.handhelmed.com)) to a hard drive on that computer.

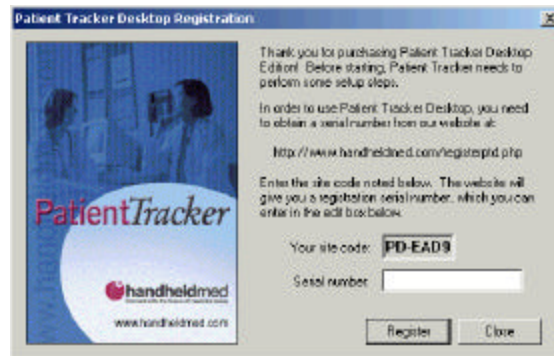
Follow these steps to install the Patient Tracker Desktop application onto your system.

### ■ To install Patient Tracker Desktop:

1. Close all open applications.
  - **IMPORTANT** If you are going to install Patient Tracker Desktop for use with a Windows CE device, the device must be in its cradle and all applications on the device must be closed.
2. Open the Windows Start menu and choose **Run....**
3. In the Run dialog, click **Browse**.
4. In the Browse dialog, navigate to the file that was downloaded from the Handheldmed Web site. Click **Open**.
5. In the Run... dialog, click **OK**.
6. Follow the on-screen instructions until installation is completed. The installation process will install the Patient Tracker Desktop software and the necessary sync software onto the desktop computer.
  - In the Installation Complete dialog, you are given the following default administrator login information: login name is **admin**, and password is **admin**.
  - In some cases it may necessary to restart the computer before the installation process can be completed. If you are prompted to restart the computer, the installation process will automatically resume after the restart.
  - **IMPORTANT** Before patient data can be sent to and from handheld devices running Patient Tracker software, doctors' login names and passwords must be set up both in Patient Tracker Desktop and in the Patient Tracker Preferences on the handheld devices. See the "Add Doctors" and "Set Up Devices to Synchronize Patient Data" sections for instructions.

■ **To run Patient Tracker Desktop for the first time:**

1. Open the Windows Start menu and choose Patient Tracker. When you launch Patient Tracker Desktop for the first time, the Patient Tracker Desktop Setup dialog appears (Figure 1). The application cannot be used until this dialog is completed correctly.



**Figure 1. First-time use setup dialog**

2. Log onto the Handheldmed registration site by pointing your browser to **<http://www.handheldmed.com/registerptd.php>**.
  3. Enter your Site Code in the space provided, and click the **Get Serial Number** button to receive your serial number.
- ➔ Your Serial Number encodes information about the number of licenses you have purchased. If you need to increase the number of Patient Tracker Desktop users in your facility, you need to purchase additional licenses from the Handheldmed Web site. Once you have done so, your Patient Tracker Desktop Serial Number will need to be updated. Only an administrative user can do this. See “Increase Number of Allowed Users” on page 60 for instructions.
4. In the Patient Tracker Desktop Setup dialog, enter the serial number in the space provided and Click **Register**.
  5. In the confirmation dialog that appears next, click **OK**. The Patient Tracker Login dialog opens (Figure 2).

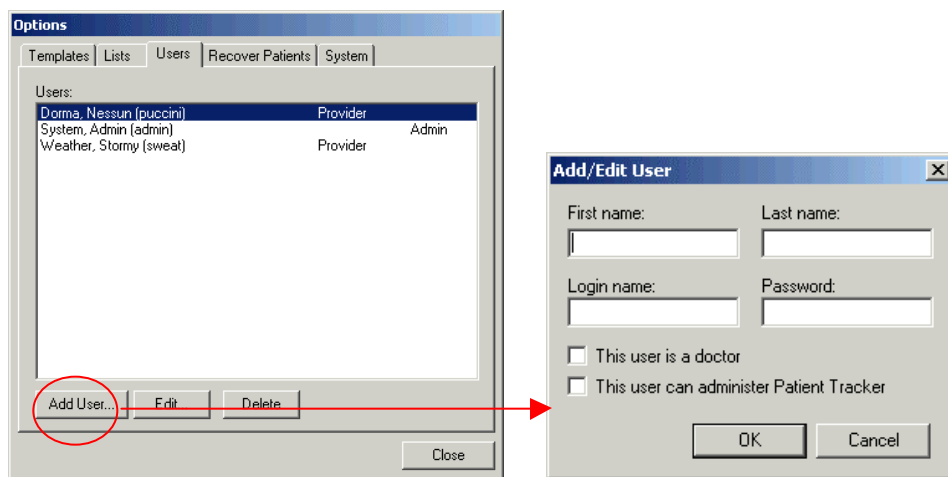


**Figure 2. Login dialog**

6. Enter the default administrative login name **admin**, and the default administrative user password **admin**. Click **Login**.
7. You are prompted to create doctor users. Click **Yes**. The Users setup screen opens (see Figure 3, left, below). Continue with the instructions in the next section to add doctors.

## Add Doctors

1. Click Add **User....** The Add/Edit User dialog opens (see Figure 3, right, below).



**Figure 3. Adding a new user**

2. Enter the doctor's first name, last name, login name, and login password.



- First name, Last name, and Login name must contain from 1 to 30 characters and must contain alphanumeric characters only. Passwords must contain from 5 to 30 characters and must contain alphanumeric characters only.
3. Select **This user is a doctor**.
- If you check the doctor check box by mistake and save the user information, you cannot return to this dialog and uncheck the checkbox; you will have to delete the user and re-enter the user information.
4. Click **OK**.
  5. Repeat steps 1-4 to add all doctors. Doctors will not be able to synchronize their device with Patient Tracker Desktop unless the same user name and password has been set up in Patient Tracker Desktop and on the doctor's device.
  6. Click **Close** in the Options dialog. Continue with the instructions in the next section.

## Change Default Administrator Login

For increased security of patient data, it is important to change the default administrator username and password as soon as Patient Tracker Desktop is up and running.

### ■ To change the default administrator login information:

1. Open the View menu and choose Options...
2. Click on the Users tab.
3. Select the **System, Admin** user. This user will have the name admin and password admin.
4. Click **Edit**.
5. Change the Password. You can also change the Login Name, if desired.
6. Click **OK** to close the Add/Edit User dialog.
7. Click **Close** to close the Options dialog.

Once installation and initial setup are complete, patient information can be entered, as described in the *Using Patient Tracker Desktop* part of this guide.

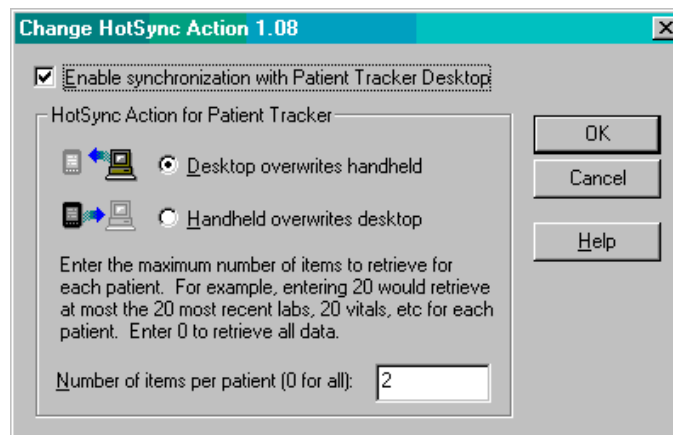
## Configure Sync Action for Data Conflicts

A *data conflict* occurs when a Patient Tracker Desktop user and a handheld device user both try to modify the same patient data at the same time. A decision must be made as to whether or not the data from the handheld should overwrite the data entered from Patient Tracker Desktop. Patient Tracker handles data conflicts differently for Palm devices and Windows CE devices.

Windows CE users see a conflict dialog on their device and can decide each time whether or not to overwrite the data entered from Patient Tracker Desktop.

For Palm devices, by default the handheld never overwrites data from the Desktop. However, this default can be changed so that the handheld data always overwrites the Desktop data, as described next.

- **To change the HotSync action for data conflicts:**
  8. Right-click the HotSync icon in the System Tray and choose Custom from the popup menu.
  9. In the Custom dialog, select the Patient Tracker Desktop item.
  10. Click **Change** to open the Change HotSync Action dialog (Figure 4).



**Figure 4. Configure HotSync Action dialog**

11. Select **Handheld overwrites desktop**.
12. Click **OK**.
13. Click **Done** in the Custom dialog.

## Install Sync Software on Multiple Devices

The following instructions are used for installing the handheld device portion of the Patient Tracker Desktop sync software onto multiple devices, without having to go through the complete Patient Tracker Desktop installation procedure.

■ **To install the Patient Tracker Desktop sync on multiple devices:**

1. Place the device in its cradle.
2. On the Windows Start menu, choose Programs, Patient Tracker Desktop, and then Install PalmOS Sync or Install Windows CE Sync, as applicable.
3. Repeat steps 1-2 for additional devices.

☞ In the case of PalmOS devices, the sync software is not actually transferred to the device until the next HotSync.

## Customization

After using Patient Tracker Desktop for a while, doctors may want to add to or modify the items that appear in various data entry fields and lists. Administrative users can customize Patient Tracker Desktop in the ways listed below. Refer to the Administration part of this guide for step-by-step instructions.

- Customize *templates* — list items that make different sets of data entry fields available. For example, each Lab template provides different data entry fields, as does each Test template.
- Customize *lists* — list items that can be assigned to various data entry list fields, such as allergies and resuscitation codes.
- Set up medication *favorites* — frequently prescribed meds, including dosage, route, number of days.
- Change the default print margins for patient checkout reports.
- Change the default database backup options.

## SET UP DEVICES TO SYNCHRONIZE PATIENT DATA

In order to download patient data to their handheld devices, doctors must enter their Patient Tracker Desktop login name and password in the Patient Tracker Desktop Preferences on the device, so that Patient Tracker Desktop can identify which patient data to synchronize on each device.

Patient Tracker administrators may also specify how much patient data to download during each synchronization, meaning the number of tests, labs, and vitals for each patient.

The following instructions explain how to perform these two tasks. Procedures for both Palm and Windows CE devices are provided.

### Set Up Username and Password on the Device

#### Palm Devices

1. Launch Patient Tracker on the handheld device.
2. Select the Menu icon to display the Patient Tracker Options menu.
3. Select Preferences.
4. Select the PTDesktop tab.
5. Enter the doctor's Patient Tracker Desktop username and password.
6. Select **Done**.

#### Windows CE Devices

1. Launch Patient Tracker on the handheld device.
2. Open the File menu and select Preferences, then select the Sync Options tab.
3. Enter the doctor's Patient Tracker Desktop username and password.
4. Select **OK**.

### Set Amount of Patient Data to Download

Patient Tracker Desktop can be configured to download to handheld devices only a certain number of tests, labs, and vitals for each patient. The procedures below explain how to configure this setting for Palm devices and Windows CE devices.

#### Palm Devices

1. Right-click the HotSync icon in the System Tray and choose Custom from the popup menu.
2. In the Custom dialog, select the Patient Tracker Desktop item.
3. Click **Change** to open the Change HotSync Action dialog.

*Set Up Devices to Synchronize Patient Data*

4. Enter the number of tests, labs, and vitals to be downloaded for each patient in the box provided. Enter 0 (zero) or leave the box empty to download all of a patient's data.
5. Click **OK**.
6. Click **Done** in the Custom dialog.

**Windows CE Devices**

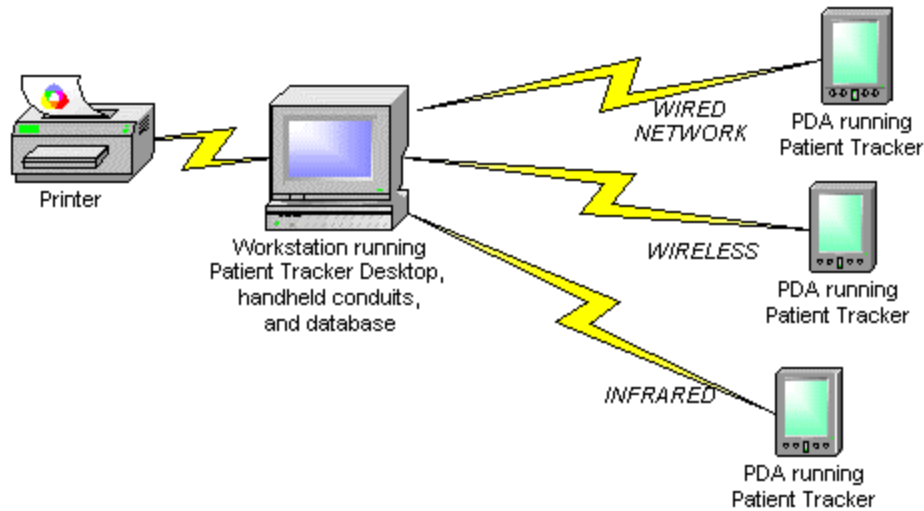
1. Double-click the ActiveSync icon in the System Tray.
2. Click Options.
3. Select the Sync Options tab. Be sure that all of the Handheldmed items are checked.
4. Select Desktop Patient. This will enable the Settings button.
5. Click **Settings**.
6. In the Desktop Patient Synchronization Options dialog, enter the number of labs, tests, and vitals to be downloaded for each patient. Enter 0 (zero) to download all of a patient's data.
7. Click **OK** to return to the Sync Options tab.
8. Click **OK**.

## ***PATIENT TRACKER DESKTOP AT A GLANCE***

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### **SYSTEM OVERVIEW**

The Patient Tracker system includes the components shown in Figure 5:



**Figure 5. Patient Tracker System Overview**

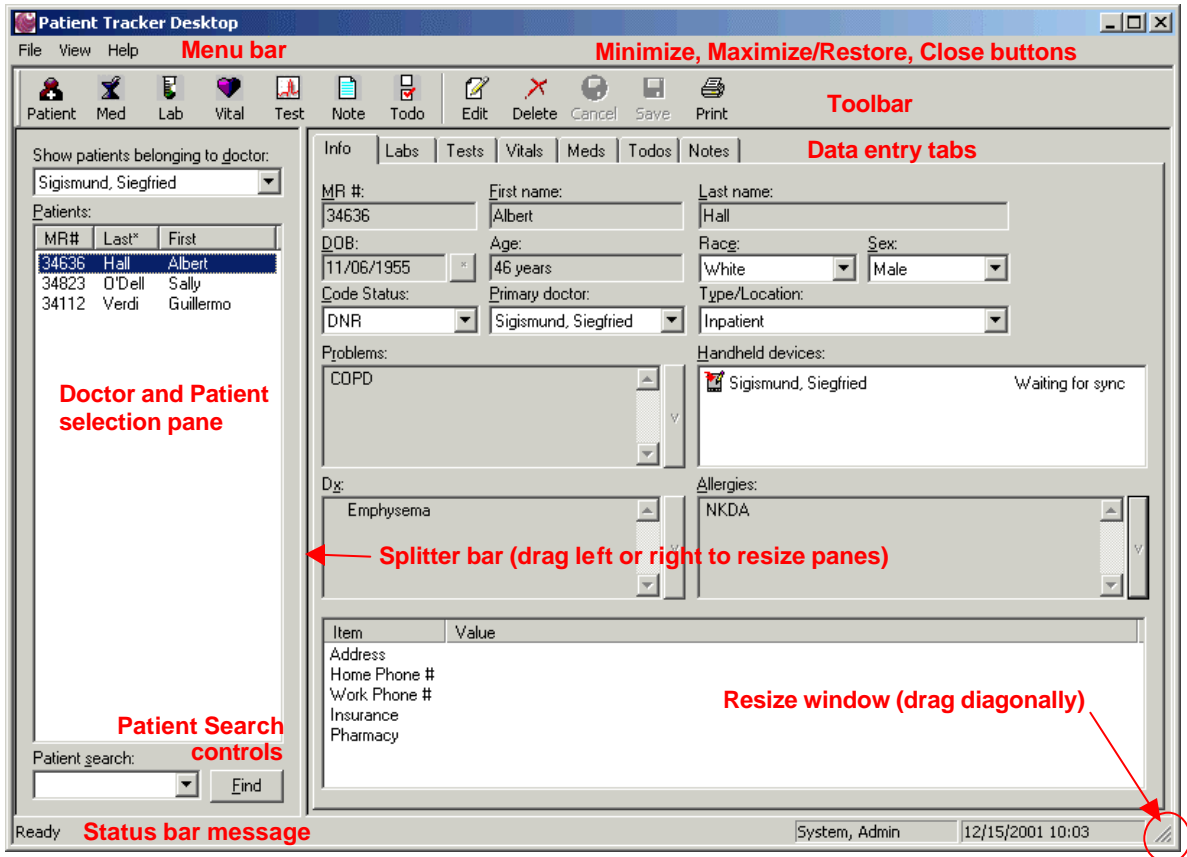
Patient Tracker Desktop provides an easy-to-use interface for managing patient data in a central database that can be accessed by any number of doctors via PDAs running the Patient Tracker application. It has been designed by physicians to make using Patient Tracker fast and easy.

### **GUIDED TOUR**

This section provides a quick, visual orientation to the main user interface features of Patient Tracker Desktop.













## Main Window

Figure 6 illustrates the features of the main Patient Tracker Desktop window.



**Figure 6. Main Patient Tracker Desktop window**

## Toolbar Buttons

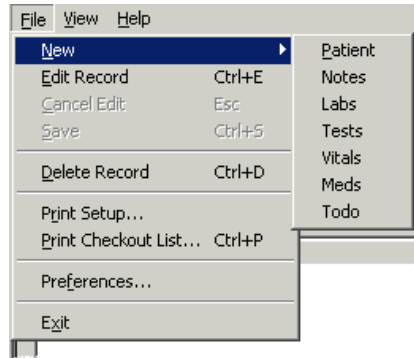
Button	Description
 Patient	Add a new patient. Opens the Info dialog.
 Note	Add SOAP or H&P note. Opens the Create Note dialog.
 Lab	Order lab or enter lab results. Opens the Labs dialog.
 Test	Order test or enter test results. Opens the Tests dialog.
 Vital	Enter new vital signs. Opens the Vitals dialog.
 Med	Enter a new prescription. Opens the Meds dialog.
 Todo	Enter a new Todo item. Selects the Todo tab and inserts a new Todo item at the top of the list.
 Edit	Edit data. Use this command after selecting a tab to make the data entry fields available for editing. This button puts the program into Edit mode. Once in Edit mode, you must Save or Cancel any editing before you can switch to another task.
 Delete	Delete the selected item in a list (such as a Patient, Lab, Todo, etc.)
 Cancel	Cancel any data entry changes. This button is available only after the Edit button has been selected.
 Save	Save any data entry changes. This button is available only after the Edit button has been selected. Once you are in Edit mode, you must Save or Cancel the edits before you can switch to another task.
 Print	Print a checkout list for one or more patients. You may choose to include each patient's medicines, vitals, and/or Todos in the printout.

- To see a brief description of what a toolbar button does, rest the mouse pointer on the toolbar button and look at the text in the bottom left corner of the Patient Tracker Desktop window (Status bar message – see Figure 6).



## Menus

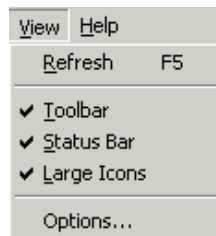
### File Menu



### Use the File menu to:

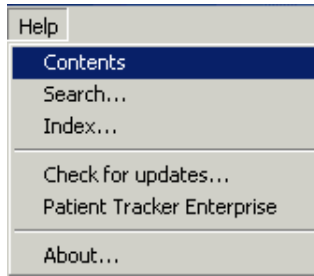
- Create new patient records, order new labs, tests, etc. (same as toolbar buttons).
- Edit, Cancel Edit, Save, or Delete the current patient record (same as toolbar buttons).
- Print checkout list of patients (same as toolbar button).
- Edit patient report print margins. (Preferences)
- Set up meds *favorites* —frequently used prescriptions. (Preferences)
- Exit Patient Tracker Desktop.

### View Menu



### Use the View menu to:

- Refresh displayed data. (Rarely needed, as synchronizing data automatically refreshes the data displayed in Patient Tracker Desktop.)
- Display (✓) or Hide the toolbar, status bar, and large toolbar icons. The Large Icons command toggles between large toolbar icons (with text labels) and small toolbar icons (without labels). Choosing small icons increases the space available in the main window to display the patient list and data entry tabs.
- Access administrative Options, which are used to perform the following tasks:
  - Add, edit, and delete users, including doctors.
  - Edit data entry field templates and lists.
  - Recover deleted patients.
  - Set patient database backup options.
  - Register and update Patient Tracker Desktop software.

**Help Menu**

**Use the Help menu to:**

- Access online help window. The Contents tab, Search tab, or Index tab can be selected as the initial active tab in the help window by selecting Contents, Search..., or Index..., respectively.
- Check for Patient Tracker Desktop updates on the Handheldmed Web site, and download updates.
- Get information about Patient Tracker Enterprise software from the Handheldmed Web site.
- View software copyright and version information.

## Data Entry Tabs




The main Patient Tracker Desktop window includes a set of tabbed “pages” (Figure 7), which make available the various data entry fields that are used to enter and maintain patient chart data. To bring a tab to the front, click on it.



**Figure 7. Data entry tab labels**

- [Plug-in modules for Patient Tracker Desktop, such as Charge Capture \(for billing information\), add new tabs to the main window.](#)

The following table briefly describes each data entry tab.

Tab	Description
Info	Show patient’s personal data (such as name, DOB, race). Show patient’s problems, diagnosis, and known allergies. Show patient’s pharmacy, insurance, phone number, and address information. (These custom fields can be changed and new ones can be created.) For each doctor, shows the following information about their sync status with regard to the current patient (in the Handheld Devices field): <ul style="list-style-type: none"> <li>• Type of access each doctor has on the device:               <ul style="list-style-type: none"> <li> OFF (patient’s data not sync’d),  Read-Only, or  Read-Write</li> </ul> </li> <li>• Sync status (such as Waiting), or date and time of last sync</li> </ul>
Labs	Keep track of labs ordered, including completion dates and results.

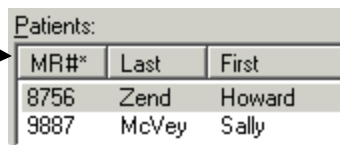
Tab	Description
Tests	Keep track of tests ordered, including completion dates and results.
Vitals	Keep track of vital signs, including dates.
Meds	Keep track of patient's medications, including dates.
Todos	Keep track of reminders, including priorities and completion status. Adding new labs automatically adds an item to the Todo list, as a reminder to view results.
Notes	Keep track of SOAP notes and H & P notes.

## Reordering Lists

When lists of patients, labs, tests, and other patient data appear with column headings, as shown in Figure 8, you can reverse the list order on any column by clicking on its heading. For example, the two items in Figure 8 are in reverse alphabetical order by last name. To put them in alphabetical order, simply click on the **Last** column heading "button." Likewise, the items are shown in descending numerical order; to reorder the items in ascending numerical order, simply click on the **MR#** column heading. Column headings act as a toggle between descending and ascending order; clicking a column heading again restores the original order.

An asterisk indicates the column on which the items are currently sorted (MR# in Figure 8).

Click on a column heading to reverse the order of list items based on the values in that column.



Patients:		
MR#*	Last	First
8756	Zend	Howard
9887	McVey	Sally

**Figure 8. Ordering a list by column heading**

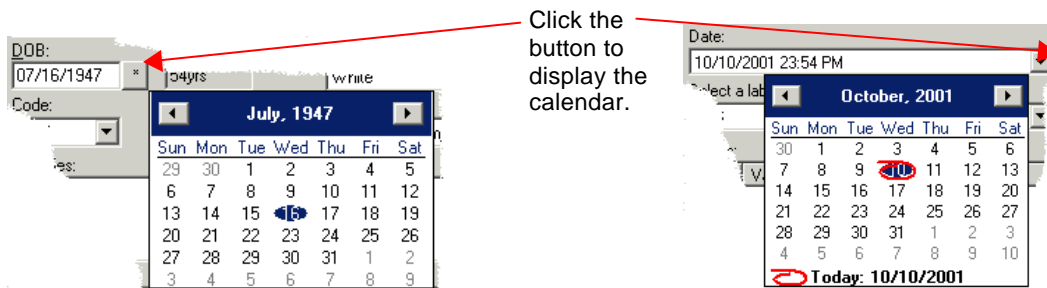
## Special Data Entry Fields

Most of the data entry field controls in Patient Tracker Desktop are standard Windows controls, such as text boxes, popup lists, check boxes. This section describes how to use special data entry field controls that are available in Patient Tracker Desktop : date fields, date-time fields, editable list fields, note fields, and autotext fields.

- ➡ When customizing a template (as explained later in this guide), you can choose the type of control you want a new template field to have.

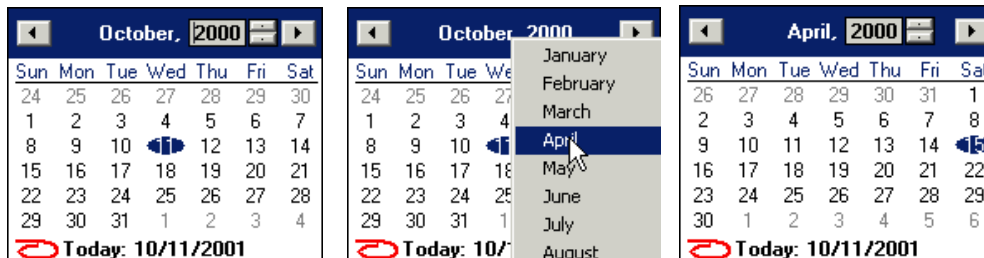
## Date and Date/Time Fields

Date fields and date-time fields feature a popup calendar control, as shown in Figure 9.



**Figure 9. Date field (left) and Date/time field (right)**

The following illustrations explain how to change the date in the calendar control.



**To change the year:**  
click on the year at the top of the calendar, then click the upper or lower button until the desired year is displayed.

**To change the month:**  
Click on the month at the top of the calendar, then click on the desired month in the popup menu.

**To change the day:**  
Click on the desired day.

Date/time fields provide an additional method for changing the time, which can also be used to change the date (as an alternative to using the popup calendar). Simply click on the month, day, year, hours, or seconds, and type over the highlighted number with the desired number (Figure 10). Alternatively, you can use the **Up** arrow and **Down** arrow keys to increase or decrease the numbers, respectively. You can also use the **Left** arrow and **Right** arrow keys to move the selection highlight left or right, instead of using the mouse.

➡ Date-time fields use a 24-hour clock. AM/PM changes automatically according to the hours entered.



**Figure 10. Change date, time in a date/time field**

## Editable Popup List Fields

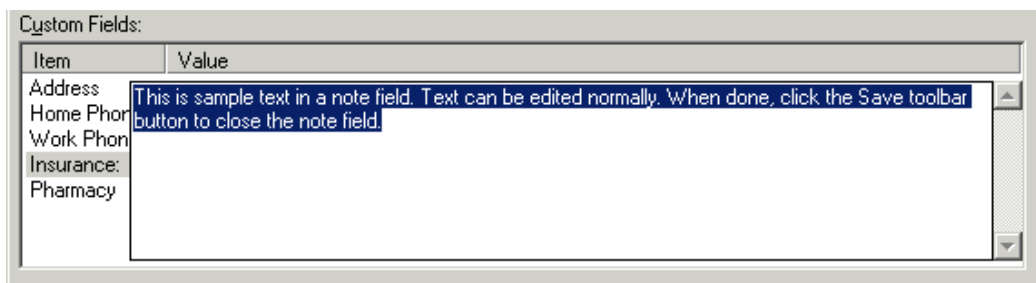
In popup list fields, you must select one of the predefined items. In contrast, in an editable popup list field, you can either select from a list of predefined items, or enter any text (Figure 12). The new text does **not** get added to the predefined list, however.



**Figure 12. Editable list field example**

## Note Fields

A note field is basically a large text box; note fields are used where more text might need to be entered than would typically fit in a text box. Figure 13 shows an example of a note field in the Custom Fields section of the Info tab. To close a note field, click Save or Cancel on the toolbar, or move to a different data entry field.

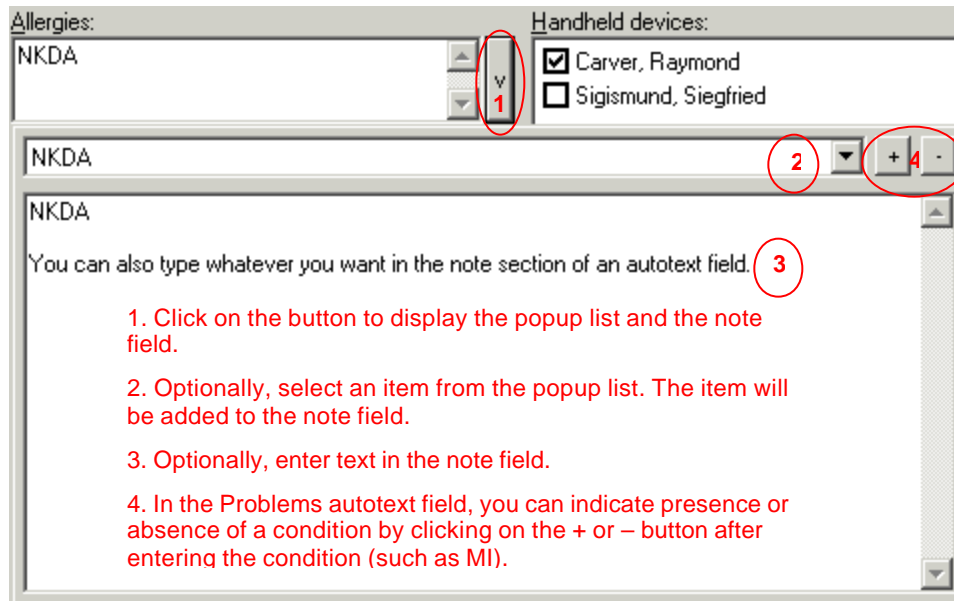


**Figure 13. Note field example**

## Autotext Fields

Autotext fields are a combination of a popup list and a note field (Figure 14). The Allergies, Problems, and Dx fields in the Info tab are examples of autotext fields. You can select an item from the list or enter text into the note field, or do both. To

close an autotext field, click Save or Cancel on the toolbar, or move to a different data entry field.



**Figure 14. Autotext field example**

## Keyboard Shortcuts

This section describes keyboard alternatives to using the mouse to select a list item, choose menu commands, select a data entry field, mark and unmark a check box, and other actions.

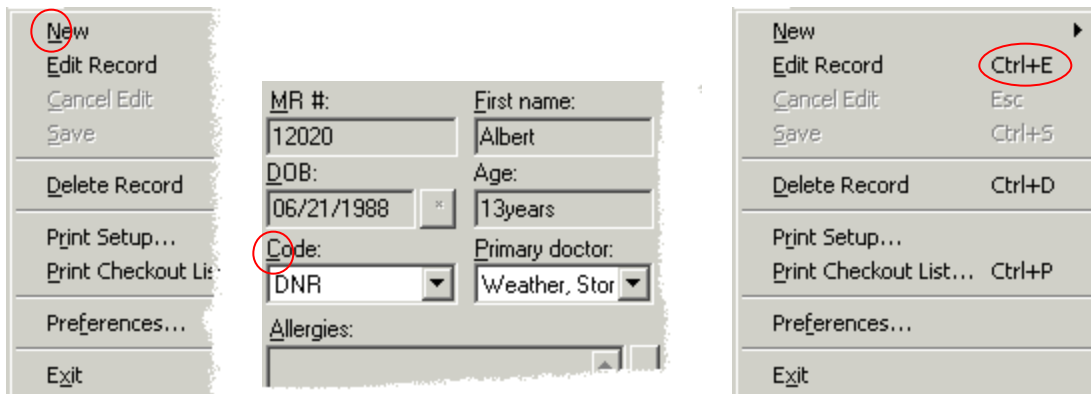
### Selecting an Item in a Popup List

You can select an item in a popup list by typing the first letter of the item. For example, in the Info tab's Race field, type **w** to select "White." In the Info tab's Sex field, type **f** to select "Female." In the Info tab's Code field, type **c** to select "CPR only."

### Alt- and Ctrl-Key Combinations

Patient Tracker Desktop uses the standard Microsoft Windows **Alt** and **Ctrl** keyboard shortcuts; these keys can be used in combination with other keys to select menu items, select data entry fields, and execute commands without using the mouse.

The key to use with the **Alt** key is indicated on the screen by an underlined letter, as shown in Figure 15 (left and center). **Ctrl**-key combinations appear next to the menu commands for which they are an alternative, as shown in Figure 15 (right).



**Figure 15.** Alt-key (left, center) and Ctrl-key (right) keyboard shortcut examples

- In some versions of Windows, underlined letters do not appear in menu names and menu commands until after the **Alt** key has been pressed.

## Tab and Shift-Tab

To move the *focus* (the “active” or “currently selected” field, button, etc.) from one field or control to the next without using the mouse, press **Tab** to move forward or **Shift-Tab** to move backward.

## Spacebar

The spacebar can be used to select and deselect options that use check boxes and radio buttons. When a check box is the currently active control, pressing the spacebar toggles the check mark on and off. When an unselected radio button is the currently active control, pressing the spacebar turns that radio button on (and deselects the previously selected radio button).

## **USING PATIENT TRACKER DESKTOP**

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### **START AND EXIT**

■ **To start Patient Tracker Desktop:**

- Click on the Windows Start button and choose Patient Tracker from the Start menu.

■ **To exit Patient Tracker Desktop:**

- Click on the Close button in the main window, or open the File menu and choose Exit. Each time you exit the program, a message box will appear while patient data is being backed up.

### **SELECT A PATIENT**

■ **To select a patient:**

1. Select the patient's doctor. All patients assigned to the selected doctor are listed in the Patients list.
2. If the patient's name is visible in the Patients list, click on the patient to select him or her. If the patient's name is not visible, use the Search feature described next.

■ **To search for a patient in the Patients list:**

1. Click on the heading of the column by which you want to search for a patient: MR#, Last, or First. The Patients list will be sorted in descending order on the selected column. (To reverse the sort order, click the same column heading again.)

☞ The column by which the list is currently sorted is indicated by an asterisk.

2. In the Patient search text field, type the first few letters of the patient's first name or last name, or the first few numbers of the patient's MR# (depending on which column you used to sort the list), and click **Find**. The first matching patient will be selected (see Figure 16).
3. If necessary, click **Find** again to select the next matching patient.



- The previous ten patient searches are saved in the Patient search popup list. To re-run a recent patient search, select it from the popup list.

Step 1: Choose the column on which you want to sort the patients (the selected column heading will be marked with an asterisk).

Step 2: Type the starting characters(s) of the patient's last name, first name, or MR# (depending on the column selected in Step 1) in the Patient search text box.

Step 3: Click **Find**.

The first matching patient is selected.

TIP: The previous 10 patient searches are saved in the Patient search popup list. To re-run a recent patient search, select it from the popup list.

MR#	Last*	First
10932	Doppelganger	Cynthia
10201	Hall	Albert
29384	Morton	Cyril
42396	Mundi	Gloria
12122	Stoogie	Selbert

**Figure 16. Searching for a patient**





## ENTER/EDIT PATIENT INFORMATION






### ■ To add a new patient:

- Click the Patient button on the toolbar (shown at left), or open the File menu and choose New, then Patient. The Info dialog opens.
- Each patient must be assigned to a primary doctor. Therefore, the doctor must already be in the system before adding the patient. See “Add Users, Doctors, Administrators” on page 40 for instructions for adding doctors to the system.

The following table explains the use of the data entry fields in the Info dialog and Info tab.

Field	Description
MR#	Medical record number (enter text).
First	First name (enter text).
Last	Last name (enter text).
DOB	Click  to select a date. (See "Date and Date/Time Fields" on page 20 for data entry instructions for this type of field.)
Age	Automatically filled when DOB is entered. This field is display-only.
Race	Select race from list.
Sex	Select sex from list.
Code	Select resuscitation code from list.
Type	The Type field can be used to classify patients by some list of categories—for example, hospital, clinic, discharged, etc. Each office/practice can define its own list of patient types.
Primary Doctor	Select doctor from list.
Allergies	Click  to open the list and note field. See "Autotext Fields" on page 21 for data entry instructions for this type of field.
Problems	Click  to open the list and note field. See "Autotext Fields" on page 21 for data entry instructions for this type of field.
Dx	Click  to open the list and note field. See "Autotext Fields" on page 21 for data entry instructions for this type of field.

Field	Description
Handheld devices:	<p>Click on the icon next to each doctor on whose device this patient should appear, until the desired icon appears. Options include:</p> <ul style="list-style-type: none"> <li> Off: No data for this patient is sent to doctor's device during synchronization.</li> <li> Read-Only: Data for this patient is sent to doctor's device but cannot be changed on the device. Neither new data for this patient nor new patients can be added on the device.</li> <li> Read-Write: Doctor can add and modify data for this patient in the Patient Info screen, can modify Todos, and can delete (inactivate) meds on the device. However, labs, tests, vitals, notes cannot be modified. New patients can be added on the device. <i>Only one doctor may have read-write synchronization rights for a single patient.</i></li> </ul> <p>This field also indicates the sync status of the current patient for each doctor (for example, "waiting for sync").</p>
Custom Fields	Select the desired Item to make the data entry field available. These items and their associated data entry controls may be customized, and therefore they might vary from office to office.

■ **To edit patient information:**

1. Click on the Info tab, if it is not in front.
2. Click **Edit** on the toolbar.

➡ *Once you are in Edit mode, you cannot go to any other part of the application without clicking Cancel, Save, or Print on the toolbar.*

1. Make additions or changes, as needed.
2. Click **Cancel** to discard any changes, or **Save** to save changes and exit Edit mode.

## Move Patient to Another Doctor

■ **To move a patient to another doctor:**

1. In the Patient Tracker Desktop main window, select the current doctor.
2. Select the patient.
3. In the Info tab, select the new doctor in the Primary doctor field.

## ENTER/EDIT LAB INFORMATION



### ■ To enter a new lab:

- Click the Lab button on the toolbar (shown at left), or open the File menu and choose New, then Lab. The Labs dialog opens.

The following table explains the use of the data entry fields in the Labs dialog.

Field	Description
Date	Automatically displays the current system date and time. See “Date and Date/Time Fields” on page 20 for data entry instructions for date/time fields.
Select a lab	Select from list. The items that have been included in the selected lab’s template appear in the Details section of the dialog. You can enter the lab details in this dialog or in the Lab tab.

- If you save a lab without entering any data, a Todo is created that refers to the lab.

### ■ To edit lab results:

1. Click on the Labs tab, if it is not in front.
  2. Select the item you want to edit from the list in the upper part of the tab.
  3. Click **Edit** on the toolbar.
- Once you are in Edit mode, you cannot go to any other part of the application without clicking Cancel, Save, or Print on the toolbar.
4. Make additions or changes, as needed, in the Details fields in the lower part of the tab. Click on a Details item to make the text box available for entering or editing results.
  5. Click **Save** to save changes (or **Cancel** to discard changes) and exit Edit mode.

## ENTER/EDIT TEST INFORMATION



### ■ To enter a test:

- Click the Test button on the toolbar (shown at left), or open the File menu and choose New, then Test. The Tests dialog opens.

The following table explains the use of the data entry fields in the Tests dialog.

Field	Description
Date	Automatically displays the current system date and time. See “Date and Date/Time Fields” on page 20 for data entry instructions for date/time fields.
Select a test	Select from list. The items that have been included in the selected test’s template appear in the Details section of the dialog. You can enter the test details in this dialog or in the Tests tab.
Details	Select the Results field to enter notes about test results. Note fields, such as Results, can contain a maximum of 7000 characters.

### ■ To edit test results:

1. Click on the Tests tab, if it is not in front.
  2. Select the item you want to edit from the list in the upper part of the tab.
  3. Click **Edit** on the toolbar.
- *Once you are in Edit mode, you cannot go to any other part of the application without clicking Cancel, Save, or Print on the toolbar.*
4. Make additions or changes, as needed, in the Details fields in the lower part of the tab. Click on a Details item to make the text box available for entering or editing results. (Note fields, such as Results, can contain a maximum of 7000 characters.)
  5. Click **Save** to save changes (or **Cancel** to discard changes) and exit Edit mode.

## ENTER/EDIT VITAL SIGNS INFORMATION



### ■ To enter vital signs:

- Click the Vital button on the toolbar (shown at left), or open the File menu and choose New, then Vital. The Vitals dialog opens.

The following table explains the use of the data entry fields in the Vitals dialog and tab.

Field	Description
Date	Automatically displays the current system date and time. See “Date and Date/Time Fields” on page 20 for data entry instructions for date/time fields.
Select Vital	Select from list. The items that have been included in the selected vitals template appear in the Details section of the dialog. You can enter the vitals details in this dialog or in the Vitals tab.

■ **To edit vital signs:**

1. Click on the Vitals tab, if it is not in front.
  2. Select the item you want to edit from the list in the upper part of the tab.
  3. Click **Edit** on the toolbar.
- ➡ Once you are in Edit mode, you cannot go to any other part of the application without clicking **Cancel**, **Save**, or **Print** on the toolbar.
4. Make additions or changes, as needed, in the Details fields in the lower part of the tab. Click on a Details item to make the text box available for entering or editing results.
  5. Click **Save** to save changes (or **Cancel** to discard changes) and exit Edit mode.

## ENTER/EDIT MEDS INFORMATION



### ■ To enter new a prescription:

- Click the Med button on the toolbar (shown at left), or open the File menu and choose New, then Med. The Meds dialog opens.

The following table explains the use of the data entry fields in the Meds dialog and tab.

Field	Description
Date	Date the medication was prescribed. Defaults to the current system date and time. You can change the date if necessary. See "Date and Date/Time Fields" on page 20 for data entry instructions for date/time fields.
Favorites	<b>(Meds dialog only)</b> Select from list, unless the prescription has not been saved as a favorite. (See "Set Up Meds Favorites" on page 57.)
Save in favorites list	<b>(Meds dialog only)</b> If you enter a new set of values for this prescription in the Details section, you can save those values as a new favorite when you exit this dialog by checking this check box.
Allergies	<b>(Meds tab only)</b> Lists drug allergies, if any.
Details	Click on the space under Values next to the item you want to enter, and select or enter the desired information (depending on the type of field used for the item). You can add custom items to this list by adding them to the Meds template (see "Set Up Templates on page 43). See "Track Medications" below for information on tracking active meds.
Show completed or inactive meds	<b>(Meds tab only)</b> Check the check box to display all medications prescribed for this patient. Uncheck the box to display active prescriptions only.

### ■ To edit prescriptions:

1. Click on the Meds tab, if it is not in front.
2. Select the item you want to edit from the list in the upper part of the tab. (If desired, check or uncheck the **Active** or **Inactive** check box to change the prescriptions listed.)
3. Click **Edit** on the toolbar.

- ↻ Once you are in Edit mode, you cannot go to any other part of the application without clicking Cancel, Save, or Print on the toolbar.

4. Make additions or changes, as needed, in the Details fields in the lower part of the tab. Click on a Details item to make the text box available for entering or editing results.
5. Click **Save** to save changes (or **Cancel** to discard changes) and exit Edit mode.

## Track Medications

You can track a patient's active and inactive medications using the following Details fields in the Meds dialog or Meds tab:

- **Track Days?** — Select Yes.
- **# Days** — Enter the number of days for which the medication is to be active. The start date of the active period is the date entered in the Date field at the top of the Details list.

Once you have entered the tracking information in these two fields, the system will consider the medication as be active until the specified number of days have passed, after which time the medication will be automatically be considered inactive.

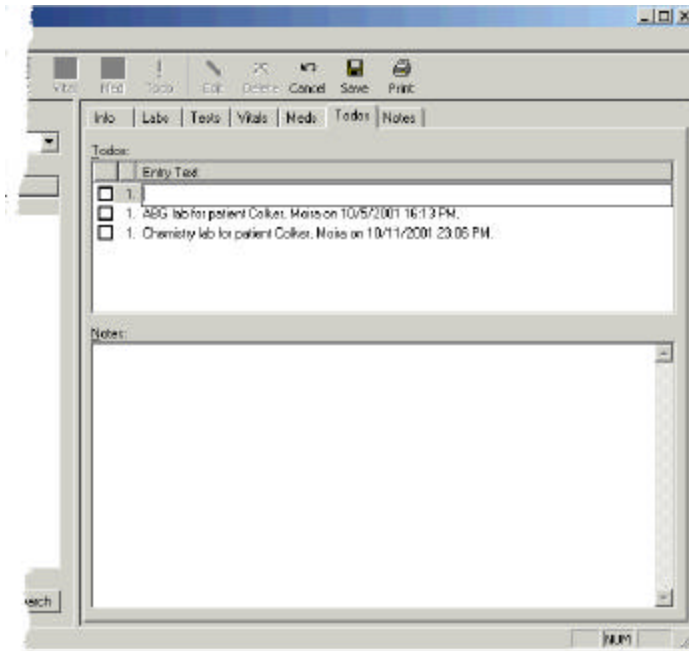
## ENTER/EDIT TODOS

### ■ To enter new a Todo item:



1. Click the Todo button on the toolbar (shown at left), or open the File menu and choose New, then Todo. The Todo tab is selected, its fields are made available for data entry, and the insertion point is placed in the Entry Text field for a new entry at the top of the Todos list (Figure 17).





**Figure 17. Add Todo item**

2. Enter the text for the Todo.
3. Optionally, you can enter a note about the Todo in the Notes section of the tab (up to a maximum of 1024 characters).
4. Click the Save toolbar button when done.

■ **To change a Todo's priority:**

1. Click the Edit toolbar button.
2. Click on the number in front of the item and choose the desired priority from the popup list.

➤ Available priority values (1,2,3, etc.) are determined by the Priority list entries.

■ **To edit a Todo item:**

1. Select the Todo tab, if it is not in front.
2. Click the Edit toolbar button.
3. Edit the Todo as needed (text, notes, priority, completion).
4. Click the Save toolbar button when done.

➤ Once you are in Edit mode, you cannot go to any other part of the application without clicking Cancel, Save, or Print on the toolbar.

■ **To mark a Todo item as completed:**

4. Click the Edit toolbar button.
5. Click on the check box in front of the Todo.

➤ You can remove the “Completed” check mark at any time by clicking on the check box again.

■ **To delete a Todo item:**

1. Select the Todo tab, if it is not in front.
2. Select the Todo item to be deleted and click the Delete toolbar button.

## ENTER/EDIT SOAP NOTES

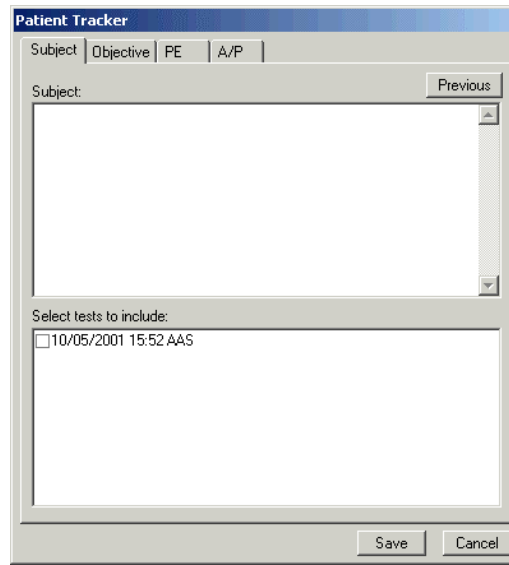
➤ A maximum of 7000 characters can be saved in a note field.

■ **To start a new SOAP note:**



1. Click the Note button on the toolbar (shown at left), or open the File menu and choose New, then Note. The Create Note dialog opens.
2. In the Create Note dialog, click **Soap Note** to accept the current date and time and open the SOAP note entry dialog (Figure 18).

➤ For instructions on editing the date and time, refer to “Date and Date/Time Fields” on page 20.



**Figure 18. SOAP note dialog**

The following table summarizes how to use the fields and commands on the various SOAP note tabs.

<b>Tab</b>	<b>Field — Usage</b>
Subjective	<ul style="list-style-type: none"> <li>• Subject — Note field: enter text.</li> <li>• Select tests to include — Click on the check box next to each test to be included in the note.</li> <li>• Previous (button) – Click to replace current subjective note with note entered previously (during the same login session).</li> </ul>
Objective	<ul style="list-style-type: none"> <li>• Vitals — Select vital signs (by date) to include in a printed report.</li> <li>• Objective — Note field: enter text.</li> <li>• Select labs to include — Click on the check box next to each lab to be included in the note.</li> <li>• Previous (button) – Click to replace current objective note with note entered previously (during the same login session).</li> </ul>
PE	For each item, enter text in the corresponding autotext, text or note field.
A/P	<ul style="list-style-type: none"> <li>• A/P — Note field: enter text.</li> <li>• Select meds to include — Click on the check box next to each med to be included in the note.</li> <li>• Previous (button) – Click to replace current A/P note with note entered previously (during the same login session).</li> </ul>

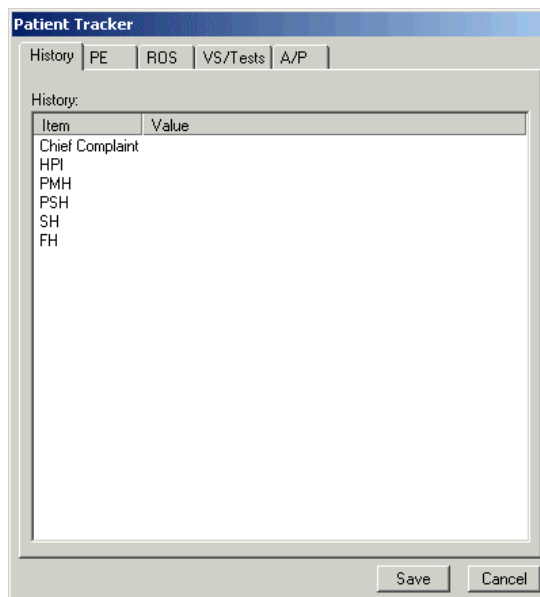
## ENTER/EDIT H & P NOTES

■ **To start a new H &P note:**



1. Click the Note button on the toolbar (shown at left), or open the File menu and choose New, then Note. The Create Note dialog opens.
2. In the Create Note dialog, click **H & P Note** to accept the current date and time and open the H & P note entry dialog (Figure 19).

➡ For instructions on editing the date and time, refer to “Date and Date/Time Fields” on page 20.



**Figure 19. H & P note dialog**

The following table summarizes how to use the H & P Note fields and commands.

<b>Tab</b>	<b>Field — Usage</b>
History	For each item, enter text in the corresponding autotext, text or note field.
PE	For each item, enter text in the corresponding autotext, text or note field.
ROS	For each item, enter text in the corresponding autotext, text or note field.

Tab	Field — Usage
VS/Tests	<ul style="list-style-type: none"> <li>• Vitals — Select vital signs (by date) to include in a printed report.</li> <li>• Tests — Click on the check box next to each test to be included in a printed report.</li> <li>• Labs — Click on the check box next to each lab to be included in a printed report.</li> </ul>
A/P	<ul style="list-style-type: none"> <li>• A/P — Autotext field: enter text.</li> <li>• Select meds to include — Click on the check box next to each med to be included in a printed report.</li> <li>• Include allergies in note — Check this option to include allergy information in printed H &amp; P notes.</li> <li>• Previous (button) – Click to replace current A/P note with note entered previously (during the same login session).</li> </ul>

## PRINT NOTES

This section explains how to print SOAP and H & P notes.

### ■ To print notes:

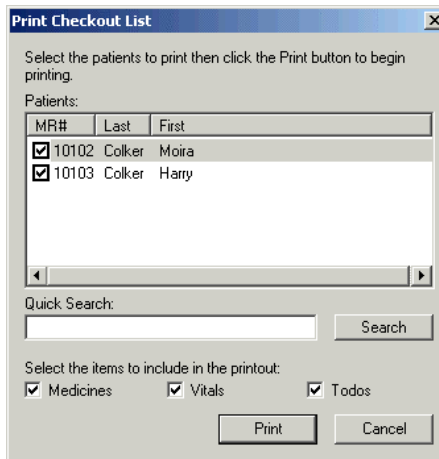
1. Select the patient.
2. Click on the Notes tab.
3. Select the note to be printed from the Available Notes list.
4. Click the **Print** button on the Notes tab (**not** the toolbar Print button).
5. When the Print dialog opens, click **OK**.

## PRINT REPORTS

The Patient Checkout report includes all of the information entered in the Info tab for each patient in the report. Optionally, meds, vitals, and todos for each patient can be included in the report.

### ■ To print a Patient Checkout report:

1. Click the Print toolbar button. The Print Checkout List dialog opens (Figure 20).



**Figure 20. Print Checkout List dialog**

2. Select patients and any additional items (meds, vitals, todos) to print for each patient, by clicking in the corresponding check boxes.
  - [The Quick Search feature works the same as the Patient search feature in the main window \(see “Select a Patient” on page 24\).](#)
3. Click **Print**. The report will be printed on the default printer.

## SYNCHRONIZE PATIENT DATA

This section describes the patient data synchronization rules that are applied in Patient Tracker Desktop when a sync operation is performed with a device.

The synchronization rules interact with the settings of the Handheld Device icons in the Info tab for each patient. The possible settings are as follows:



**OFF:** No data for this patient is sent to the doctor's device during synchronization.



**Read-Only:** Data for this patient is sent to the doctor's device but cannot be changed on the device. Neither new data for this patient nor new patients can be added on the device.



**Read-Write:** The doctor can add and modify data for this patient in the Patient Info screen, can modify Todos, and can delete (inactivate) meds on the device. However, labs, tests, vitals, notes cannot be modified. New patients can be added on the device.

- ➔ Only one doctor can have a device set to Read-Write access for a given patient.
  
- ➔ During the *initial* synchronization of a doctor's device with Patient Tracker Desktop, if no login name or password has been entered in the PTDesktop Preferences screen on the device, a dialog is presented on the device for entering and saving the doctor's login information.

The data synchronization rules are as follows (conditioned by the device settings described above):

1. Data for new patients that have been created on the handheld are uploaded into the database.
2. Data for existing patients that has been entered on the handheld is uploaded into the database.
3. If a patient has been deleted on the handheld device, that patient's Handheld Devices check boxes are all set to OFF in Patient Tracker Desktop (in the Info tab).
4. The latest data in the database is downloaded to the device for all patients being synchronized.

In cases of data conflict, where patient data that has been changed on a handheld device is being uploading while the same patient data is being viewed or changed in the Desktop, Patient Tracker works differently on Window CE devices and PalmOS devices:

- On Windows CE devices, a conflict dialog is displayed and the device user can decide whether or not to overwrite data entered from the Desktop.
- On Palm devices, the setting in the Change HotSync Action dialog determines which data gets stored in the database (see "Configure Sync Action for Data Conflicts" on page 10).

## ADMINISTRATION

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Only users set up as Patient Tracker Desktop administrators can perform the tasks described in this section.

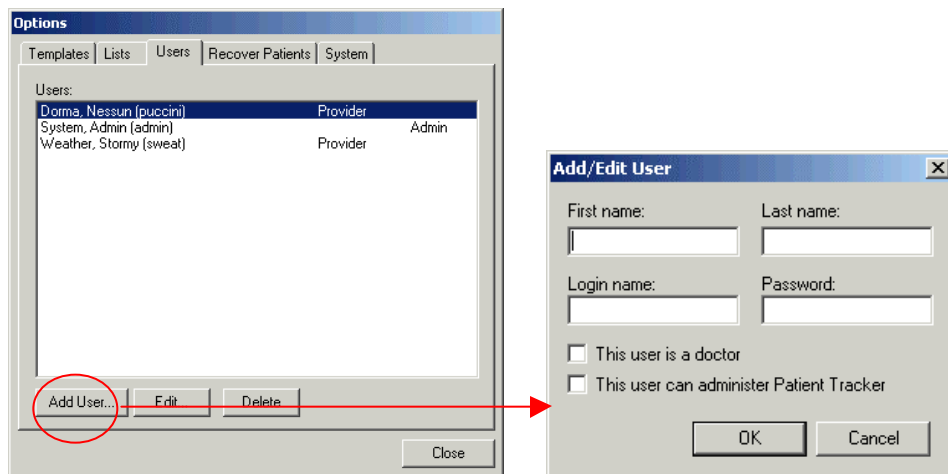
- **IMPORTANT!** When Patient Tracker Desktop is installed, a default administrative user is created, with a default login name and password. Be sure to change the default administrative user login information, for increased security of your patient data. See “Change Default Administrator Login” on page 9 for instructions.

## ADD USERS, DOCTORS, ADMINISTRATORS

There are three types of Patient Tracker Desktop user: regular (non-administrator), doctor, and administrator. Regular users can access all Patient Tracker Desktop features except the administrative features. Doctors can download and upload patient data between Patient Tracker Desktop and their handheld devices. Administrators can access all of Patient Tracker Desktop’s features.

■ **To add a new user:**

1. Open the View menu and choose Options....
2. Click on the Users tab (Figure 21).
3. Click **Add User**....



**Figure 21. Adding a new user**

5. Enter user’s first name, last name, login name, and login password.



- First name, Last name, and Login name must contain from 1 to 30 characters and must contain alphanumeric characters only. Passwords must contain from 5 to 30 characters and must contain alphanumeric characters only.
- 6. If the new user is a doctor: Select **This user is a doctor**. Only doctors can download patient data.
  - If you check the doctor check box by mistake and save the user information, you cannot return to this dialog and uncheck the checkbox; you will have to delete the user and re-enter the user information.
- 7. If the new user should have administrator rights to edit Patient Tracker Desktop defaults, users, etc.: Select **This user can administer Patient Tracker**.

## EDIT USER INFORMATION

The following constraints apply to changing user information:

- First name, Last name, and Login name must contain from 1 to 30 characters and must contain alphanumeric characters only. Passwords must contain from 5 to 30 characters and must contain alphanumeric characters only.
  - Once you have designated a user as a doctor by selecting the **This user is a doctor** check box, you cannot remove the check mark. You can delete a doctor, however.
  - If you delete a doctor, you will be prompted to transfer all of that doctor's patients' data (including deleted patients) to another doctor.
  - There must always be at least one doctor.
  - There must always be at least one administrative user. If you select the only administrative user and remove the check mark from the **This user can administer Patient Tracker** check box, the check mark will be removed, but the next time Patient Tracker Desktop is started, that user will still be a valid administrative user.
- **To edit a user's name, login information, access rights:**
1. Open the View menu and choose Options....
  2. Click on the Users tab.
  3. Select the user from the list.
  4. Click **Edit**. The User dialog opens.
  5. Edit the fields and check boxes as needed.

- If you make a change that is not allowed, a warning dialog appears with instructions.

## DELETE USERS

The following constraints apply to deleting users:

- You cannot delete yourself when logged in to Patient Tracker Desktop.
- You cannot delete the last user. The initial administrative user will always appear in the user list.
- If you attempt to delete a user who is a doctor, you will be prompted to transfer all of that doctor's patients' data (including deleted patients) to another doctor.
- There must always be at least one doctor. (All patients must be associated with a doctor.)
- There must always be at least one administrative user. (The initial administrative user will always appear in the user list.)

### ■ To delete a user:

1. Open the View menu and choose Options....
2. Click on the Users tab.
3. Select the user from the list.
4. Click **Delete**.

- If you are not allowed to delete the selected user, a warning dialog appears with instructions.

## RESTORE DELETED PATIENTS

When you delete a patient, all of the patient's data remains in the database but cannot be viewed. The following procedure makes a patient's data available again.

### ■ To restore patient data for a deleted patient:

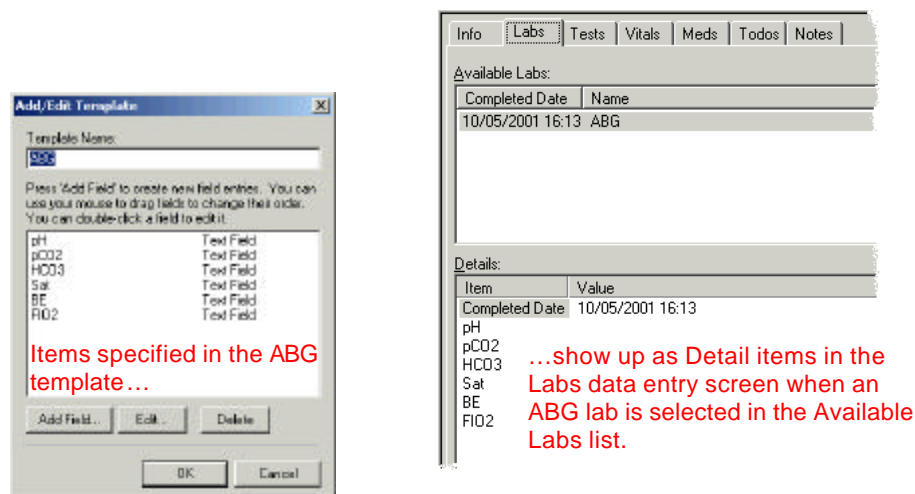
1. Open the View menu and choose Options....
2. Click on the Recover Patients tab.
3. Select the patient to be recovered.
4. Click **Recover**.
5. Repeat steps 3 and 4 for additional patients, if necessary.
6. Click **Close**.

## SET UP TEMPLATES

This section explains how to customize *templates* in Patient Tracker Desktop.

Templates are used to specify the fields for entering the results from labs, tests, and H & P exams. There is also a template for custom patient information.

Templates determine which fields appear in the Details section of the main window's data entry tabs. To illustrate, Figure 22 below shows that the Detail fields for the ABG lab (on the right) are the fields specified in the ABG template (on the left). By modifying the list of ABG template fields, you would change the fields that appear in the Details section of the Labs tab when ABG is selected.



**Figure 22. Template fields**

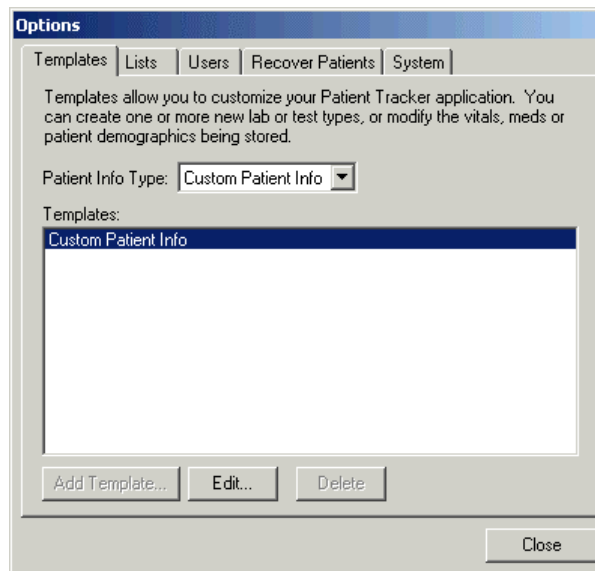
Patient Tracker Desktop comes with many default templates, which can be customized. New templates for additional labs and tests can also be created. Templates for meds are called *favorites*; new meds favorites and can be set up as described in the “Set Up Meds Favorites” section on page 57. These customization features enable Patient Tracker to better meet the needs of different offices or practices.

### Template Setup Example

In the following example, a new Lab template, Lipid Profile, will be added to the system. The steps are for this specific modification. Refer to the “General Template Procedures” section for additional template-related operations.

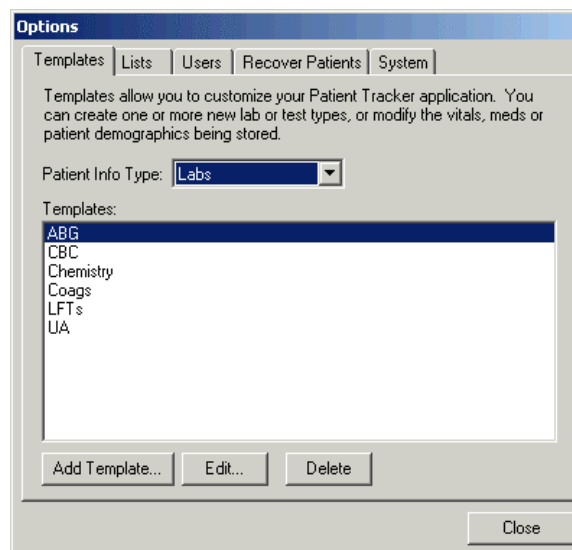
■ **To modify a template:**

1. Open the View menu and choose Options.... Click on the Templates tab if it is not in front (Figure 23).



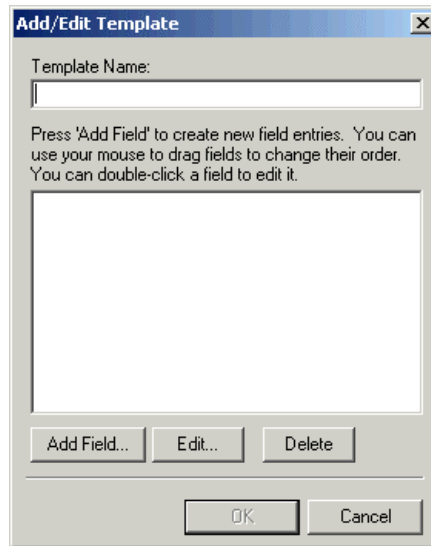
**Figure 23. Options: Templates tab**

2. In the Patient Info Type drop-down menu, select Labs (Figure 24).



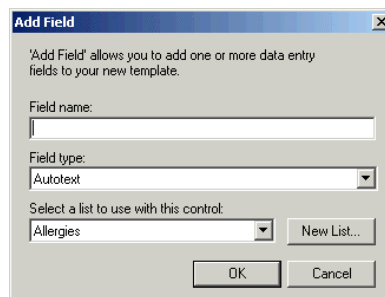
**Figure 24. Lab templates**

3. Click **Add Template....** The Add/Edit Template dialog opens (Figure 25).



**Figure 25. Add/Edit Template dialog**

4. In the Template Name text box, enter **Lipid Profile**.
5. Click **Add Field...** The Add Field dialog opens (Figure 26).



**Figure 26. Add Field dialog**

6. In the Field name text box, enter **Trig**.
7. In the Field type list, choose **Text Field**.
8. Click **OK**. You are returned to the Add/Edit Template dialog.
9. Repeat steps 5-8 to add the following fields: **Chol** (text field), **HDL** (text field), and **LDL** (text field).

➤ To edit or delete a template field, in step 5, you would simply click Edit or Delete instead of Add Field.... See “General Template Procedures” below for step-by-step instructions.

10. Click **OK** to save the new template, and then Close to close the Options dialog

## General Template Procedures

This section provides general instructions for the following template setup tasks:

- Add, edit, delete template fields
- Change the order of template fields
- Add, delete templates

### ■ To access the list of templates:

1. Open the View menu and choose Options.... Select the Templates tab if it is not in front (Figure 23).
2. Select the desired Patient Info Type (Custom Patient Info, Labs, etc.) from the popup list. The templates for the selected Patient Info Type appear in the Templates list (for example, Figure 24).

The following table explains how the Patient Info Type listed in the Templates tab relate to the Details area of the main window's data entry tabs and the New... dialogs (such as new meds, new, labs, new notes). It also lists the templates that have been set up as defaults.

Patient Info Type	Purpose	Default Templates
Custom Patient Info	Specifies the patient information fields that appear at the bottom of the Info tab.	Custom Patient Info—This template can be modified but cannot be deleted. <i>(New Custom Patient Info templates cannot be created in this release).</i>
Labs	Specifies the fields in the Details list in the Labs tab.	ABG, CBC, chemistry, Coags, LFTs, UA
Meds	Specifies the fields in the Details list in the Meds tab.	Medicine —This template can be modified but cannot be deleted. <i>(New Meds Info templates cannot be created in this release).</i>
Notes	Specifies the fields in the Details area in the Notes tab.	History, PE, ROS—These templates can be modified but cannot be deleted. <i>(New Notes templates cannot be created in this release).</i>
Tests	Specifies the fields in the Details list in the Tests tab.	AAS, Abd film, Amniocentesis, Angiography, Biopsy, Colonoscopy, CT, CXR, Cytoscopy, Echo, EEG, EKG, Mammography, MRI, PAP, US, X-Ray

Patient Info Type	Purpose	Default Templates
Vitals	Specifies the fields in the Details list in the Vitals tab.	Vitals— This template can be modified but cannot be deleted.  <i>(New Vitals templates cannot be created in this release).</i>

■ **To add a template field:**

1. Follow the steps above “to access the list of templates.”
2. Double-click on the desired template. The Add/Edit Template dialog opens.
3. In the Add/Edit Template dialog, click **Add Field...**
4. Enter a name for the field in the Field name text box.
5. In the Field type list, select the type of data entry control you want to use for the new field. Use the following table to help you decide.

Template Field Control	When to Use
Autotext	Use for fields where you want users to be able to select items from a list and also be able to enter free-form text, plus be able to add (+) and (-) notations. (See "Autotext Fields" on page 21.)  Example: Info tab—Dx field
Date	Use for fields that only need to display a date (day, month, year) but not time.  Example: Info tab—DOB field
Date/Time	Use for fields that need to display both date and time.  Example: New Test dialog—Date field
Editable Popup List	Use for fields where you want users to be able to choose from a list of items <b>or</b> type new text in the field instead of making a selection from the list. (see "Editable Popup List Fields" on page 21.)
Note	Use for long text entry fields (more than 30 characters). For short text entry fields, select the Text control (see below).  Example: Info tab: Insurance (in Custom Fields)
Popup List	Use for fields where you want users to choose from a list of predetermined items. (Compare with Editable List above.)  Example: Info tab: Race
Text	Use this for short text fields (up to 30 characters).  Example: Info tab—MR# field

- If you select list-type field control in step 5 (popup list, editable popup list, autotext), the list selection field becomes available, so that you can select the list of items you want users to see when they click on the list control. Alternatively, you can create a new list on the spot by clicking **New List...**

6. When done, click **OK** to return to the Add/Edit Template dialog.

■ **To edit a template field:**

1. Follow the steps above “to access the list of templates.”
2. Double-click on the desired template. The Add/Edit Template dialog opens.
3. In the Add/Edit Template dialog, select the desired field and click **Edit...** The Add Field dialog opens.
4. Edit the field information as desired.

■ **To delete a template field:**

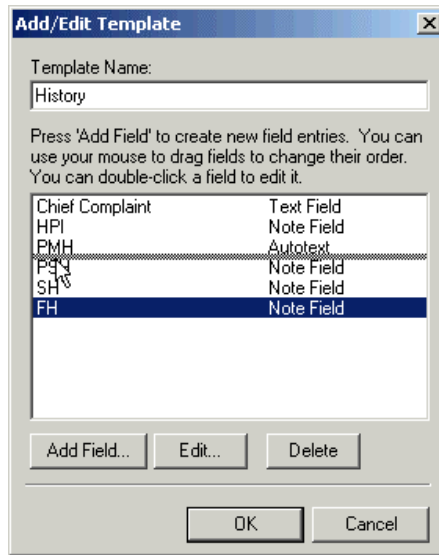
1. Follow the steps above “to access the list of templates.”
2. Double-click on the desired template. The Add/Edit Template dialog opens.
3. In the Add/Edit Template dialog, click **Delete**.

- The last template field cannot be deleted from a template.

■ **To change the order of template fields:**

1. Follow the steps above “to access the list of templates.”
2. Double-click on the desired template. The Add/Edit Template dialog opens.
3. Drag and drop fields one by one until they are in the desired order (Figure 27). (The only constraint is that you cannot drag a field below the last field in the list).





Drag items up or down the list. The gray bar indicates where the selected item will be positioned when the mouse button is released.

**Figure 27. Re-order template fields (drag-and-drop)**

■ **To create a new template:**

1. Follow the steps above “to access the list of templates.”
2. Click **Add Template....** A blank Add/Edit Template dialog opens.
3. In the Template Name field, enter a name for the new template.
4. Follow the steps for “add a template field,” above, to add as many fields as are needed.

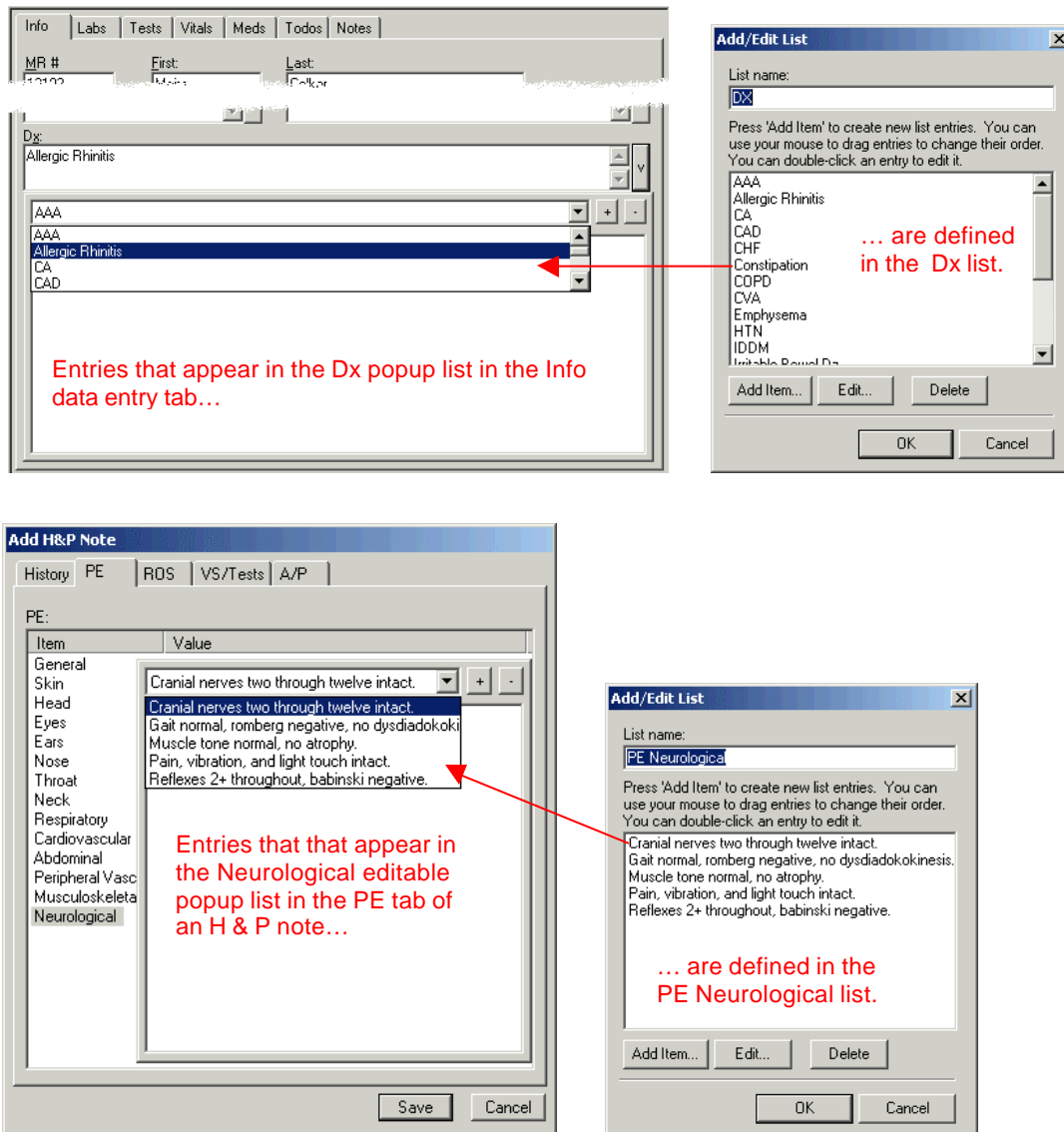
■ **To delete a template:**

1. Follow the steps above “to access the list of templates.”
2. Select the template you want to delete.
3. Click **Delete**.

➡ The last template cannot be deleted.

## SET UP LISTS

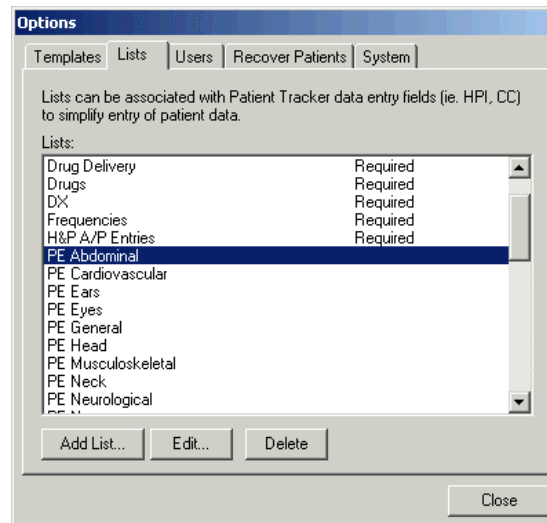
Lists are used wherever you find a list-type data entry field, such as a popup list. For example, when you open the Dx popup list (in the Info tab), the list includes whatever has been specified in the Dx list (Figure 28, upper). Similarly, in the PE tab of the H & P Note dialog, each system field has a corresponding list of predefined entries, which can be edited (Figure 28, lower). Lists save data-entry time by providing "pick lists" of frequently used phrases, diagnoses, observations, and so on.



**Figure 28. List examples**

Patient Tracker Desktop comes with many predefined lists, which can be edited, and (except for certain required lists) deleted. New lists can be created as needed.

Lists are managed using the Lists tab of the Options dialog (Figure 29). Each list should be reviewed and changes made as appropriate, using the procedures described under “General List Procedures” starting on page 54. This can also be done on an ongoing basis, as needs arise for new list entries or new lists.



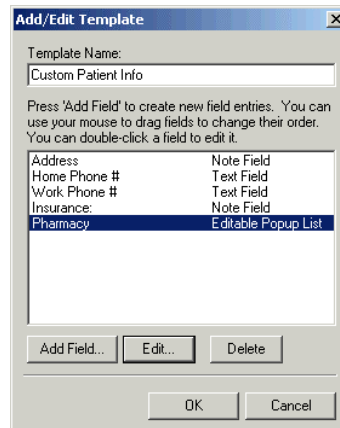
**Figure 29. Options – Lists tab**

## List Setup Example

This section provides a step-by-step example of creating a new list for one of the Custom Patient Info template fields. This example shows how you can create a new list “on the fly” when setting up a template field. You can create a new list directly, without going through a template field, as described in the “To create a new list” procedure under “General List Procedures” below.

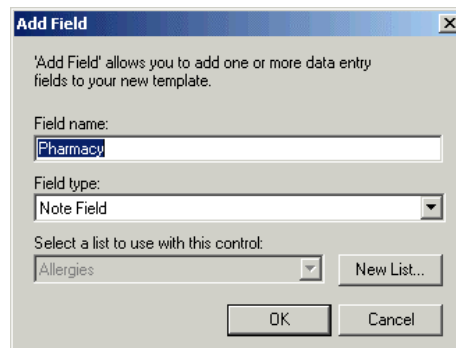
### ■ To create a list:

1. In the View menu, choose Options.... The Templates tab should be selected by default, and Custom Patient Info should be selected by default in the Patient Info Type popup list.
2. Click **Edit** to open the Add/Edit Template dialog (Figure 30).



**Figure 30. Add/Edit Template dialog**

3. Click on the Pharmacy field and click **Edit** to open the Add Field dialog (Figure 31).



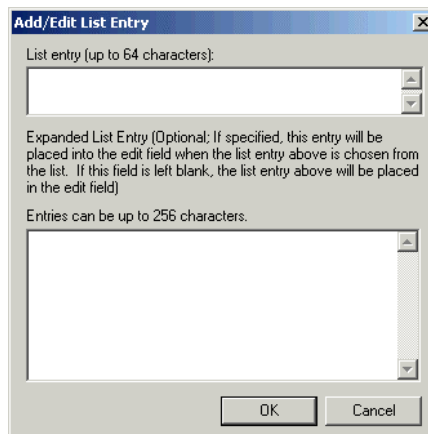
**Figure 31. Add Field dialog**

4. In the Field type popup list, select Editable Popup List. The **Select a list to use with this control** field and the **New List...** button become available.
5. Click **New List...** to open the Add/Edit List dialog (Figure 32).



**Figure 32. Add/Edit List dialog**

6. In the List Name field, enter **Pharmacies**.
7. Click **Add Item...** to open the Add/Edit List Entry dialog (Figure 33).



**Figure 33. Add/Edit List Entry dialog**

8. In the List entry (upper) text box, enter **Beverly Hills Sav-On**. (You may wish to enter the real names of pharmacies used by your patients.)
9. Click **OK**.
10. Repeat steps 8-10 to add the following list entries for the new Pharmacies list: **Beverly Hills Rite-Aid, Beverly Hills Drug Emporium**.
11. In the **Select a list...** field, select **Pharmacies**.
12. Click **OK** to close the Add Field dialog.
13. Click **OK** to close the Add/Edit Template dialog.
14. Click **Close** to close the Options dialog.

## General List Procedures

This section provides instructions for the following list setup tasks:

- Add, edit, delete list entries
- Change the order of list entries
- Create, delete lists

### ■ To access lists:

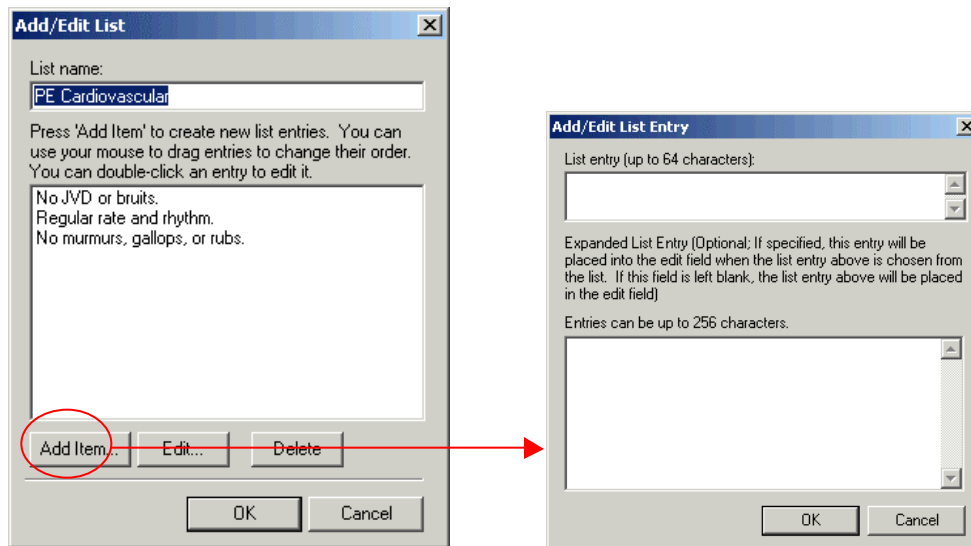
1. Open the View menu and choose Options....
2. In the Options dialog, select the Lists tab.

### ■ To add a list entry:

1. Follow the steps “to access lists,” above.
2. Double-click the desired list (or select it and click **Edit**). The Add/Edit List dialog opens (Figure 34, left).
3. Click **Add**. The Add/Edit List Entry dialog opens (Figure 34, right).
4. Enter the text of the new list entry in the upper text box.

Optionally, you can create an Expanded List Entry, where you want to be able to insert a large amount of text when you choose the list entry. For example, suppose in some Results field you want to be able to choose a list entry for a “normal” result that contains many observations associated with a normal result. Instead of writing a long list entry that would be too long to fit in the list control, enter a brief label for the list entry in the upper text box (such as “Normal”), then enter the text of the list entry itself (all of the observations you want to appear in the Results field) in the lower text box. In the field in the main window where the list containing this entry appears, if you select the Normal list entry, all of the text you entered in the Expanded List Entry text box in this dialog will be inserted into the field.

5. Click **OK** to return to the Add/Edit List dialog.
6. Repeat steps 3-5 for each entry to be added.



**Figure 34. Add list entry**

■ **To edit a list entry:**

1. Follow the steps “to access lists,” above.
2. Double-click the desired list (or select it and click **Edit**).
3. Select the desired entry and click **Edit**.
4. Edit the list entry text as needed.
5. Click **OK**.

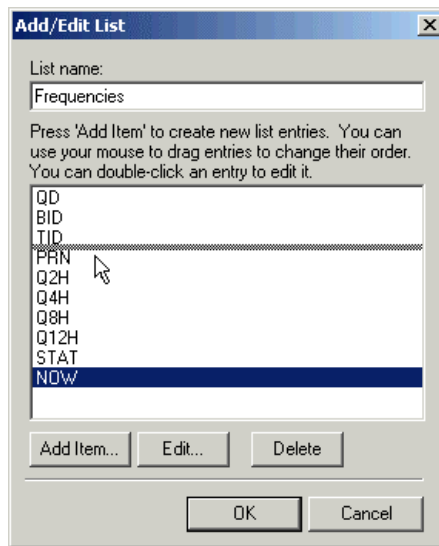
■ **To delete a list entry:**

- Follow the steps “to edit a list entry,” above, but click **Delete** instead of **Edit** in step 3.

↻ The last list entry cannot be deleted from a list.

■ **To change the order of list entries:**

1. Follow the steps “to access lists,” above.
2. Double-click on the desired list (or select it and click **Edit**).
3. In the **Add/Edit List** dialog, drag and drop items one by one until they are in the desired order (Figure 35). (The only constraint is that you cannot drag an item below the last item in the list).



Drag entries up or down the list. The gray bar indicates where the selected entry will be positioned when the mouse button is released.

**Figure 35. Reorder list entries (drag-and-drop)**

■ **To create a new list:**

1. Follow the steps “to access lists,” above.
2. Click **Add List...** A blank Add/Edit List dialog opens.
3. Enter a name for the list.
4. Follow the steps for “add a list entry,” above, to add as many entries as needed.

■ **To delete a list:**

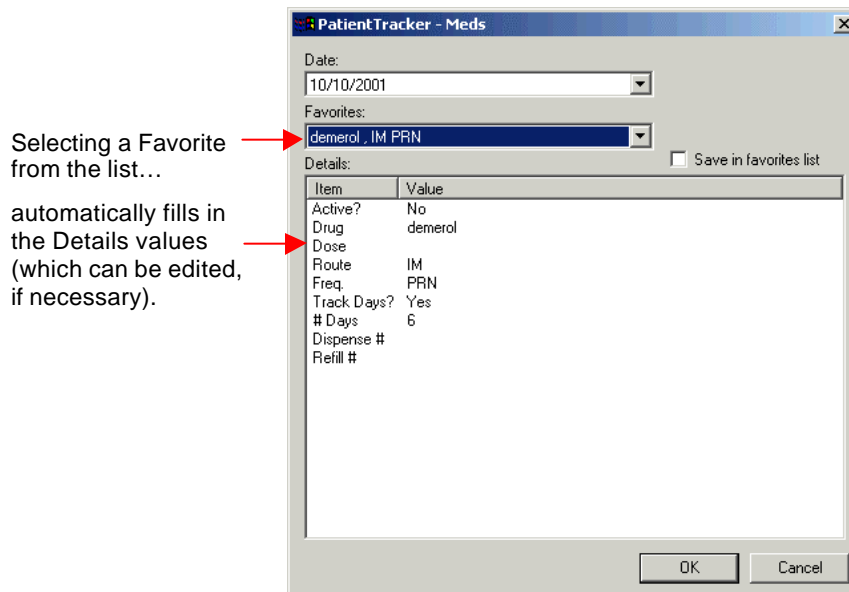
1. Follow the steps “to access lists,” above.
2. Select the list to be deleted.
3. Click **Delete**.

➡ Lists marked “Required” cannot be deleted.



## SET UP MEDS FAVORITES

A *meds favorite* is a frequently used prescription, including dosage, route, frequency, days, and refills, that you can save and reuse to avoid redundant data entry. Favorites appear in the Favorites popup list in the New Meds dialog (Figure 36). Selecting a Favorite automatically fills in the default Details with the values you specify when you create the Favorite. You can then edit any of the Details values, if necessary.

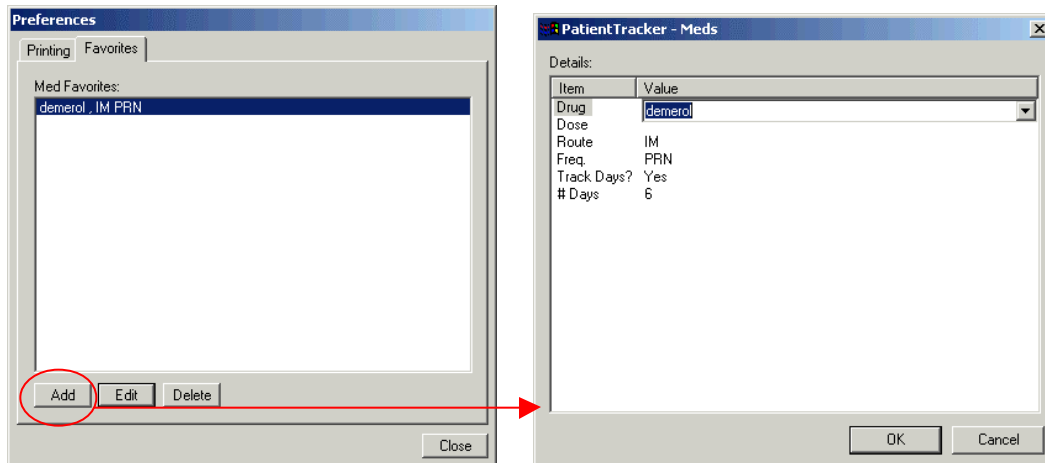


Selecting a Favorite from the list... automatically fills in the Details values (which can be edited, if necessary).

**Figure 36. Meds Favorite example**

■ **To add a meds favorite:**

1. Open the File menu and choose Preferences.... The Preferences dialog opens (Figure 38, left).
2. Click on the Favorites tab, if it is not in front (Figure 36, left).
3. Click **Add** to add a new favorite. The Meds dialog opens (Figure 36, right).



**Figure 36. Add Meds Favorite**

4. Click in the blank space next to the desired item under Value.
5. Select or enter the desired value (depending on the type of field it is).
6. Click **OK** to return to the Favorites tab. The new favorite is added to the top of the list.

■ **To edit a meds favorite:**

1. Open the File menu and choose Preferences.... The Preferences dialog opens.
2. Click on the Favorites tab, if it is not in front.
3. Select the favorite to be edited and click **Edit**. The Meds dialog opens.
4. Modify the values as needed.

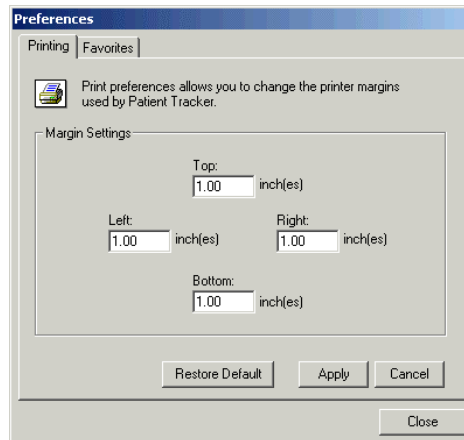
## SET UP PRINT MARGINS FOR REPORTS

The Printing preferences feature sets the print margins for patient checkout reports.

■ **To access Printing preferences:**

- Open the File menu and choose Preferences.... The Preferences dialog opens, with the Printing tab selected (Figure 38).

Enter the desired print margins (in inches) in the fields provided.



**Set Defaults** returns all margins to the original default measurements (one inch).

**Apply** saves changes and leaves the dialog open.

**Cancel** discards changes and leave the dialog open.


**Figure 38. Print margin preferences**

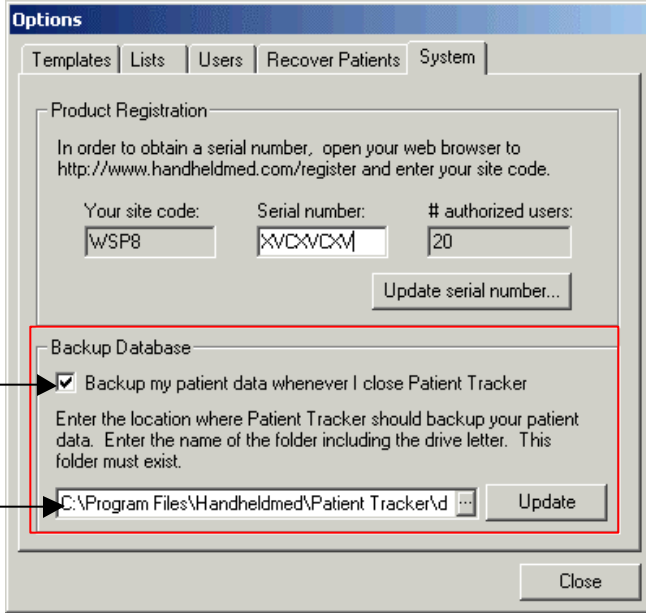
## SET UP DATABASE BACKUP OPTIONS

Patient information is stored in the Patient Tracker database. By default, the database is backed up each time you exit Patient Tracker Desktop. If desired, you can modify the location where the backup database is stored, and you can turn off the automatic backup feature.

- **To access database backup options:**
  1. Open the View menu and choose Options...
  2. Click on the System tab (Figure 38).

The “automatic backup on exit” option is turned on by default. Deselect the check box to turn it off. (It is recommended to leave this option checked.)

The default location of the database backup file can be modified by clicking the Browse button  and selecting the desired folder. Click Update if you change the backup location.



**Figure 38. Backup Database options**

## INCREASE NUMBER OF ALLOWED USERS

Patient Tracker Desktop stores information about the number of licenses you have purchased for your users. When you purchase additional licenses, you must update the number of allowed users in Patient Tracker Desktop. Use the following procedure to do this.

- **To increase the number of allowed users in Patient Tracker Desktop:**
  1. Open the View menu and choose Options...
  2. Click on the System tab to get your Site Number.
  3. Go to <http://www.handheldmed.com/registerptd.php>.
  4. Enter your Site Code and click **Get Serial Number**.
  5. Enter the new Serial Number in the System tab and click **Update Serial Number**.

## UPDATE PATIENT TRACKER DESKTOP SOFTWARE

New releases of Patient Tracker Desktop will be made available periodically on the Handheldmed Web site. Registered users will be notified by e-mail when new releases are planned. Simply choose the Check for Updates command on the Help menu to go to the Handheldmed Web site's update page. You will be able to find out if you have the most recent version of Patient Tracker Desktop and download an update if applicable.

## ***PRODUCT SUPPORT***

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### **WEB SITE HELP**

Handheldmed provides a central Support page on its Web site at <http://www.handheldmed.com/help.php>. Here you will find articles about using Handheldmed software, FAQs, an e-mail form for sending problems to Support, and a Support contact phone number.

### **E-MAIL SUPPORT**

You can also send e-mail directly to Handheldmed Support at [support@handheldmed.com](mailto:support@handheldmed.com).

## **GLOSSARY**

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ActiveSync	Name of the function in Windows CE that synchronizes data between the desktop and handheld devices.
Conduit	Software that performs the synchronization of data between a handheld device application and its corresponding desktop application.
Favorite	Set of default parameters for a prescription, saved as a group to reduce data entry. Parameters include dose, route, frequency, number of days. Med favorites can be customized.
HotSync	Name of the function in PalmOS that synchronizes data between the desktop and handheld devices.
List	Set of items that can be selected in a list-type data entry field. Lists can be customized.
ODBC	Open Database Connectivity, a technical standard that enables software applications to communicate with any database that complies with the standard.
Template	Set of fields—associated with a lab, test, prescription, or custom patient information—that appear as the Details items in the main data entry tabs and the “New...” dialogs. Templates can be customized.