HEALTH IRELAND PARTNERS LIMITED

(06/11/2001) **Configuration Manual:**

Contents:

Contents

Contents

Dynamic Elements..cntd

Miscellaneous Features

Configuration Tool Introduction

The Configuration Tool enables the *Dictionary,* the *Collective* and the *Dynamic* elements of **HEALTH *one*** to be modified to suit a particular need. The Dictionary can be modified to a varying extent dependent upon the category of term within it. *Collective* elements present the Dictionary terms in a way that is useful; these include Permanent and Associated Lists, Sequences, Aggregate Items and Grid Analysis. *Dynamic* elements modify the way **HEALTH *one*** responds dependent upon the type/name of a transaction when it is created or the content of an item.

Dictionary Element

The dictionary forms the basic building block of all other **HEALTH *one*** elements. It is comprised of two different types of terms, *Items* and *Contents* which are further categorised as described under the Dictionary heading later in the manual. The two types of term vary in function as follows:

Item Terms Item terms are used to contain data. These are pre-set within **HEALTH *one***. Modification is limited and the user does not have the ability to create or delete them.

An example is the Item Term *subjective symptoms:* the function of which is to record the symptoms reported by the patient:

FIGURE 1

Content Terms Content terms are used as responses to an item. In the **Fig. 1** example *tired all the time* is a Content Term from the dictionary. They are used to save time and provide typical responses to an Item Term.

Collective Elements

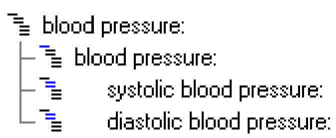
Collective elements use the dictionary terms to form useful data sets. These include:

Permanent List This is a list of dictionary terms used to further qualify a response to an item, i.e. *No improvement, worse, better* etc.

Associated List This list of dictionary terms associated with a *particular* item. The item *smoking habits:* has an associated list of: *nil*, *Ex*, *active*, *cigarettes*, *pipe.*

Grid Analysis A list of dictionary Item terms grouped together to be reported upon in either grid or tabular format. The group *BLOOD PROFILE* contains the Items: *haemoglobin*, *MCH*, *MCHC*, *MCV*, *platelets* and *ERS 1 h*.

Aggregate Item A composite item comprised of two or more dictionary *Item Terms* that naturally form data sets. The aggregate item *blood pressure:* is comprised of Item Terms *systolic pressure:* and *diastolic pressure*:.



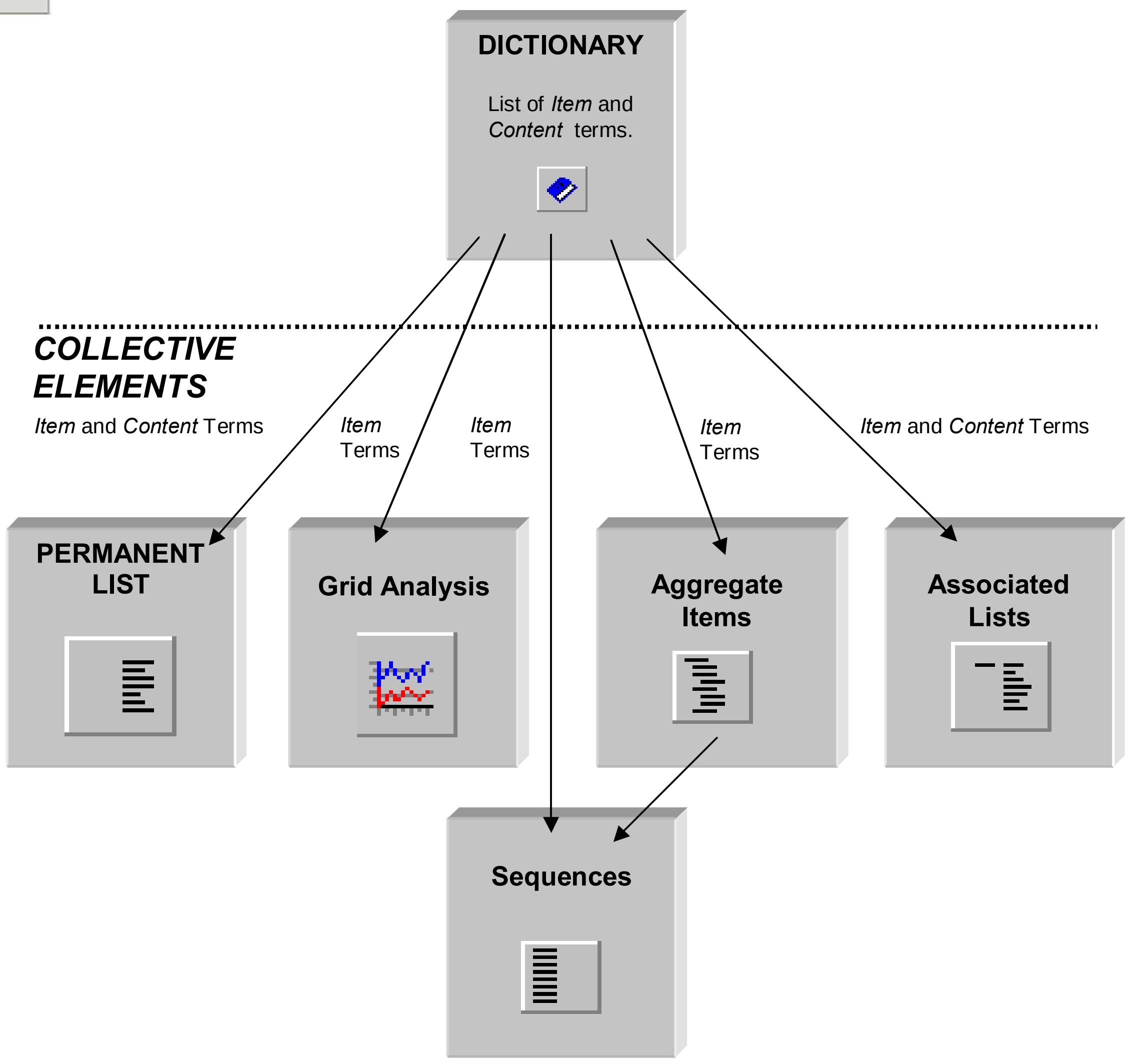
Collective Elements

Sequence Groups of dictionary *Item* terms that suit a particular need. Inserting a *Sequence* in a transaction will automatically insert all items that are members of that sequence.

The relationship between the Dictionary and Collective elements is illustrated below. See **Fig. 2**. Note: Sequences can also use Aggregate items as well as Dictionary items.

FIGURE 2

DICTIONARY ELEMENT



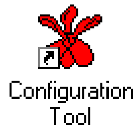
Dynamic Elements

There are two types of dynamic elements: *Setup Transaction* and *Setup Item*. *Setup Transaction* enables a transaction to be automatically initialised with Aggregate Items and/or Sequences at creation time dependent upon its Type or Name. Setup Items can cause additional sequences and/or aggregate items to be automatically placed into the current transaction dependent upon the content value of a specified item.

Configuration Tool Techniques

Starting The Program

1) Locate the icon opposite on the desktop and double click it:

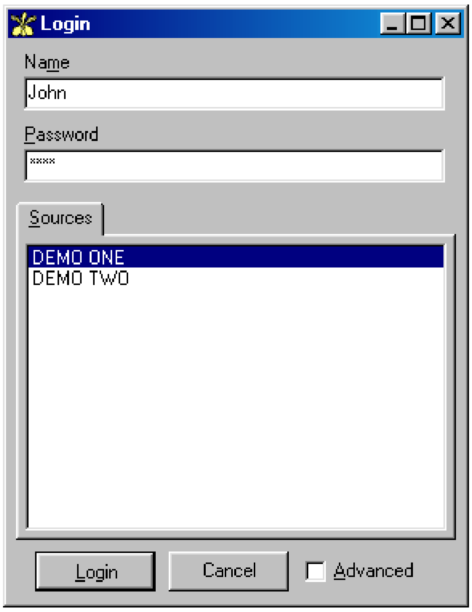


If the icon is not on your desktop follow steps 2) to 6):

2) On the taskbar click once on the **START BUTTON**.
3) Point to Programs.
4) Point to the **HEALTH *one* 3.5** folder.
5) Click on the **HEALTH *one* Tools** menu option.
6) Click on **Configuration Tool**.

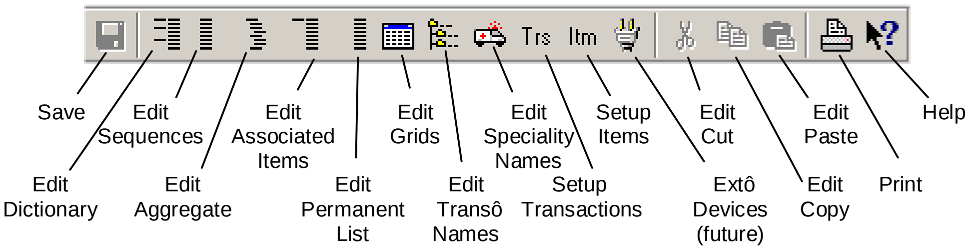
Login

The Configuration Tool has the same built in security system as **HEALTH *one*** requiring the user to identify themselves by name and password to gain access to the program. This information is entered in the LOGIN Window illustrated opposite.



1) If your practice has more than one Source click on the one you wish to open.
2) Type your name in the **Name** box.
3) Click on the **Password** box and type your code.
4) Click on the **Login** button.

Toolbar Buttons



Printing Configurations

Clicking on the toolbar *Print button* displays a selector window that enables the required element settings to be selected for printing. It is good practice to print the current settings for the element before editing.

Closing the Configuration Tool

Simply select the menu sequence **File / Exit**. If there are unsaved changes you will be prompted to save them before exiting.

Own Notes

The Dictionary

- Dictionary Terms
  - Types
  - Categories

- How the Dictionary is used in **HEALTH*one***

- Editing Dictionary Terms

- Techniques

The Dictionary

Introduction

The dictionary is a collection of terms used in **HEALTH *one***. A term can either be of the *Item* or *Content* type; each type having its own icon.

This icon denotes *Item* type terms: this one *Content* type terms:

Item type terms are divided into *Item* (general), *Administrative* or *Medical* categories. Content type terms are divided into *Content* (general) or *User* categories. When working within the dictionary a toolbar button represents each category.

ITEM TERMS

Categories

Item	Terms in this category are used to contain data. These are pre-set within **HEALTH *one***. Modification is limited and the user does not have the ability to create or delete them.
Administrative	These are a subset of Items that are available when working in the Administrative Chapter.
Medical	These are a subset of Items that are available when working in the Medical Chapter.

Note: The same Item term may belong to more than one category.

CONTENT TERMS

Categories

Content	Terms in this category are used as responses to an item. Modification is limited.
User	These are also used as responses to an item, however they are entered by the user. Modification is full and the user can create and delete as required. User maintained Content terms are denoted by two icons: or, sometimes simply:

ALL TERMS

Within the Configuration Tool there is a further facility to view all terms in the dictionary whenever this button is on the toolbar:

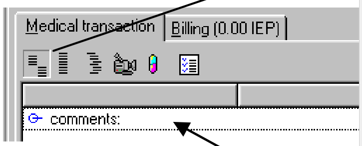
All	A list within the Configuration Tool that shows all terms within the dictionary.

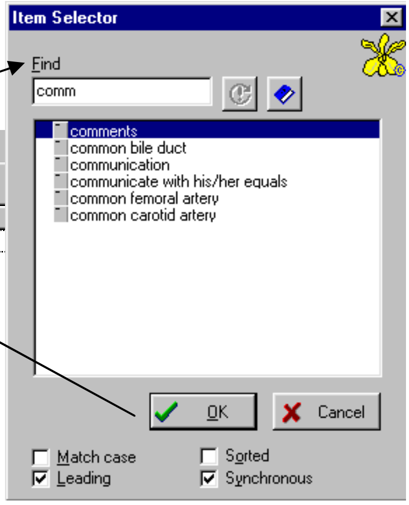
How it is Used in HEALTH *one*

FIGURE 3

The dictionary is commonly used directly in **HEALTH *one*** in two ways.

Firstly to insert an Item into a transaction:

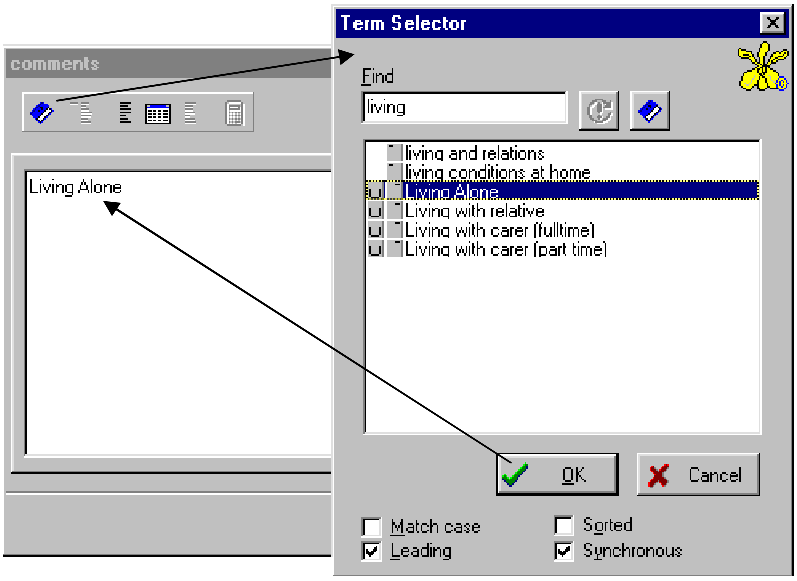




Note: Only dictionary *ITEM* type terms displayed in this context.

FIGURE 4

Secondly, to insert a response inside an Item edit window:



Note: All dictionary terms are displayed in this window, however; in this context an *Item* reacts like a *Content* term and its name is inserted as a response. This makes sense because it is not possible to have an item within an item.

Editing Dictionary Terms

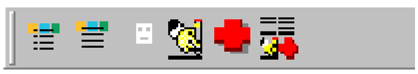
The degree of editing is dependent upon the category to which the term belongs. All *Item* terms can have their Entry Style, Display Style and Default Value edited. *User Content* terms can be created or deleted.

Opening the Dictionary

1) Open the Configuration tool and select the menu: **File / Open / Term**

Selecting a Category

2) Refer to page 10 in this manual and click on the toolbar button representing the category of term to be edited.



or select from the **Dictionaries** menu.

Selecting a Term

3) Type its name in the **Term** box. Click on the term to select it when in view in the term window.

Editing Item Styles and Default Value

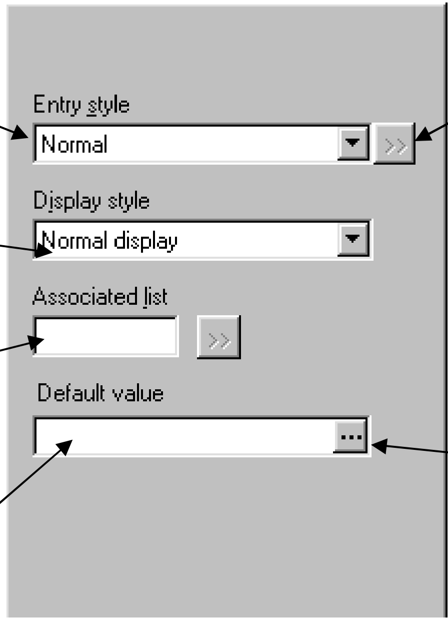
1) Select the Item type term required as described above. The styles and default value are now displayed in the panel on the right of the screen:

Select the required Entry Style here. Refer below for an explanation.

Select the display style for the Item here

If this term belongs to an associated list, the list number will appear here. This is not editable. To assign a term to an associated list see ***Associated Lists*** further on.

Type the default value directly here.

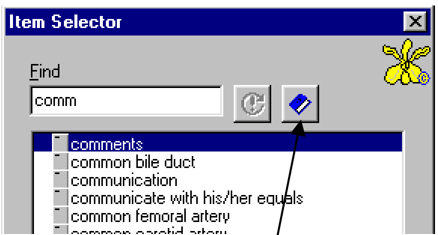


Extended Entry Style button active for Calculated, Free Text and Dbase entry styles. See Appendix A for examples

Open Item button. Causes the current Item edit window to open to allow a default value to be entered. **Note:** If the item has an associated list this will also open in the usual way

2) Upon completion click the **Apply** button.

Note: Changes made in the Configuration Tool will not come into effect in **HEALTH *one*** until it is next opened or the menu **Tools / Reload dictionaries** is selected. There is also a *Reload Dictionary* button available whenever an Associated List, Permanent List, Item Selector or Term Selector window is open in **HEALTH *one***. See **Fig. 4**



Reload Dictionary button.

Entry Style This applies to *Item* type terms only and determines the type of edit window displayed when the item is opened. The styles are:

Calculated	Produces an answer based on a calculation. For an example see appendix A.
Code Free Text	Text to be used in a coded context.
Codes	Designates entry as a code.
Date	Prompts for a Date input
Date/Time	Prompts for Date and Time input

Editing Item Styles and Default Value

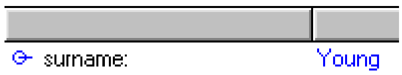
Entry Style ..cntd

DBase	Opens a *Normal* text window and automatically opens the *Data Base Query* window on top. See Appendix A for an example
Free Text	Displays a single-line text input window. See Appendix A for an example
History	Future use.
Mandatory	Used in conjunction with an associated list. List members are displayed in a drop down menu from which the response is selected. See the Item *sex:* for an example.
Measurement	Prompts for a numeric input, classified in **HEALTH *one*** as a measurement.
Normal	Displays a multi-line text input window.
Numeric	Prompts for a Numeric input.
Subtitle	Acts as a sub-title and no response windows opens
Time	Prompts for a Time input
Title	Acts as a title and no response window opens.

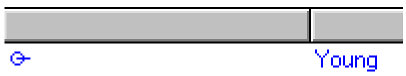
Display Style This applies to *Item* type terms only and determines the style in which the response is displayed when their edit window is closed. The styles are best described by example and are:

Left

Normal Display



Right



Sub-title/Title

History #1-3

These styles are similar to the normal, left and right above with the addition of the *Date of event* value of the item:

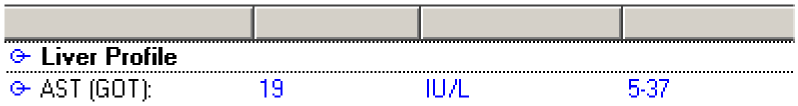
Date of event value

Editing Item Styles and Default Value

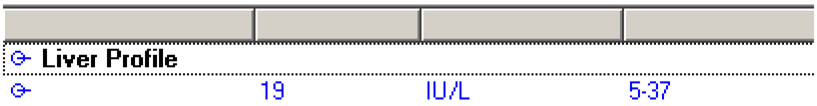
Display Style ..cntd

The next two display styles are available for numeric entry style items and relate to laboratory results. They display the *unit* and *range* values of the item.

Lab #1



Labo Right

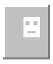


Default Value This applies to only *Item* type terms and determines the initial value. In instances where a default value has been specified this will be automatically entered as the response for the item and the edit window will not open automatically. This is useful where an item has a *most common* response, for example, the item *locality:* could be set to the county/region where the practice is located, as most patients will be from that area and only require editing for patients outside of it.

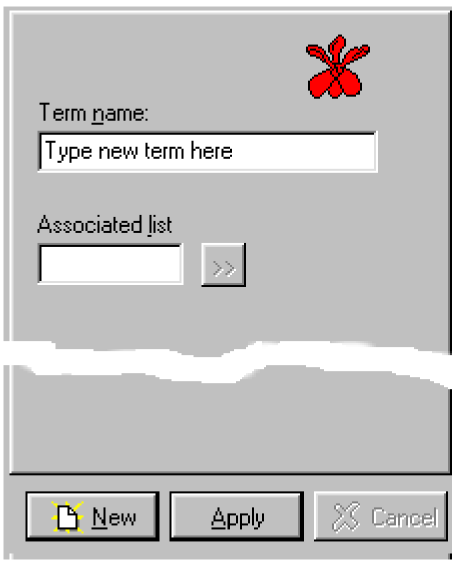
Creating and Deleting Dictionary Terms

The ability to create or delete a dictionary term only applies to *User Content* terms

CREATING USER CONTENT TERMS

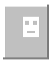


1) Open the dictionary, and select the User Content category by clicking on its button on the toolbar. Illustrated opposite.
2) Click on the **New** button and type the term new term details into the *Term name:* box.
3) Click on the **Apply** button.



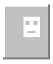
Creating and Deleting Dictionary Terms

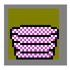
Editing User Content Terms

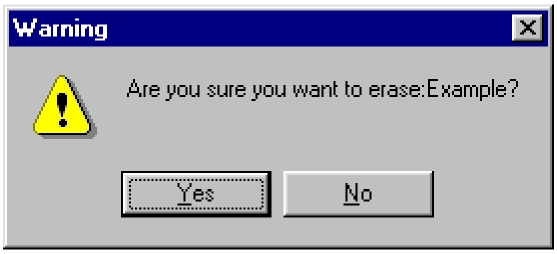


1) Open the dictionary and select the User Content category by clicking on its button on the toolbar.
2) Type the name of the term to be edited into the *Term* filter box, top left. Locate and select the term in the term list on the left.
3) Edit the content in the *Term name* box as required. Click on the **Apply** button.

Deleting User Content Terms



1) Open the dictionary, and select the User Content category by clicking on its button on the toolbar.
2) Type the name of the term to be deleted into the *Term* filter box, top left. Locate and select the term in the term list on the left.
3) Press the keyboard *Delete* key or drag the term into the waste bin at the bottom of the screen. 
4) Confirm deletion when prompted.



Own Notes

Collective Elements

- Aggregate Items
- Sequences
- Associated Lists
- Permanent Lists
- Grids

Aggregate Items

Introduction

Aggregate items enable multi-responses to be entered in a transaction. They are constructed by grouping two or more dictionary items together. An example would be blood pressure, where two values are required to form a useful entry, *Diastolic* and *Systolic* pressures.

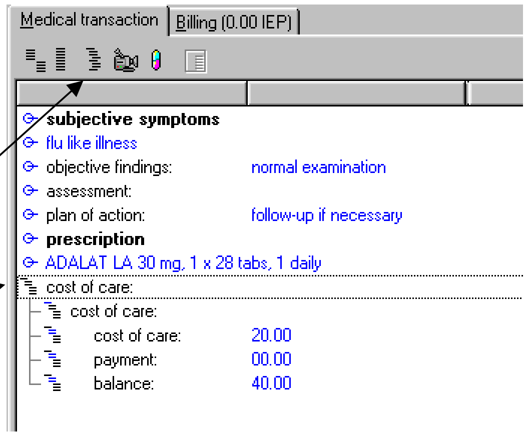
How they used in Health One

Insert Aggregate Item button

Aggregate Items are most commonly used to insert multi-response data into a transaction. They have there own icon on the **HEALTH *one*** Item Panel toolbar. The example transaction opposite illustrates the use of the *cost of care* aggregate item.

Insert Aggregate Item button.

Cost of care aggregate item enabling three responses.

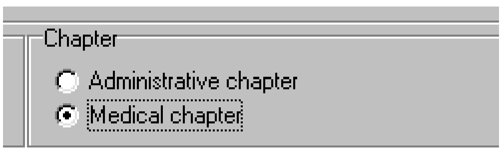


Editing Aggregate Items

Editing consists of creating/deleting/amending groups of dictionary terms. Each group comprising one Aggregate Item.

Creating an Aggregate Item Group

1) Open the Configuration tool and login
2) Select the menu sequence **File / Open / Aggregate**
3) Select the chapter in which this group will be available.



Note: Health One chapters are *Administration* or *Medical*. Aggregate items will be available only in the chapter in which they are created. Health one as shipped at the time of writing had no Aggregate Items available in the Administration chapter.

4) Enter the name of the Item term, which will form the title for the group in the *Term* filter box.
5) Locate the term required in the term window and drag this into the group window in the top right of the screen. This term will automatically be included as the first entry in the member window for this aggregate group and form the title for this aggregate.

Aggregate Items

Editing Aggregate Items

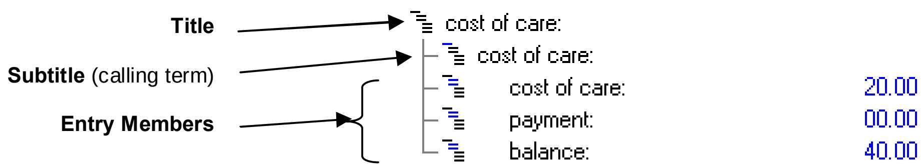
Creating an Aggregate Item Group

Note: Remember that Item terms are classified as belonging to the Administration or Medical categories. If an administration Item term is dragged into a group window for a Medical chapter you will be prompted that this is not permissible and visa versa. Also Aggregate Items can only be constructed from dictionary *Item* terms, if a *Content* term is dragged into the group window a *not allowed* prompt will be displayed.

Adding Members to a Group

GROUP TITLE AND ENTRY MEMBERS

Each group has title and entry members. The first, top most, member of the group forms the title and is automatically entered when the group is created. The second member item forms the subtitle - data cannot be entered into this, third and subsequent members are for data entry. The cost of care aggregate is used once again as an example:



Note: The same item can be used as the title, sub-title and first entry member if required. See above where *cost of care:* has been used in all three roles. Simply drag the item once into the group window to form the group and twice into the member window to form the sub-title and first entry member.

1) Select the group to be edited by clicking on its name in the group window. Top right.
2) Enter the name of the member Item term in the *Term* filter box.
3) Locate the term required in the term window and drag this into the *Member* window in the bottom right of the screen.
4) Repeat for other member terms as required.

Demoting and Promoting Entry Members

Whenever an entry member is selected, with the exception of the first, an arrow icon will appear at the bottom of the member window. This is used to promote or demote the selected item with regard to the entry member directly above it. Promoting/Demoting entry members is useful in constructing more complex Aggregate Items.

Deleting Group Members

1) Select the group to be edited.
2) Select the member to be deleted and drag into the waste bin. Alternatively, select the member and press **Ctrl + X**.

Aggregate Items

Editing Aggregate Items

Deleting Aggregate Groups

1) Locate the group to be deleted in the *Group* window.
2) Select the group and drag into the waste bin. Confirm deletion when prompted.

Closing the Aggregate

1) Select the menu sequence **File / Close**. Accept the Save Changes dialogue box to make the change permanent.

Own Notes

Sequences

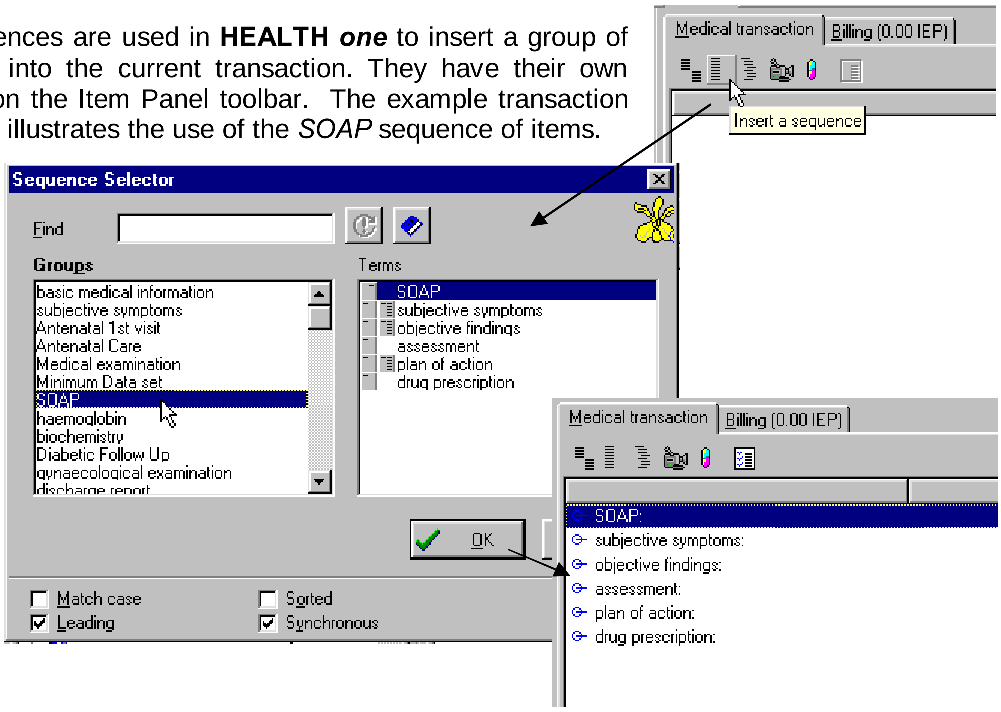
Introduction

Sequences are used to form groups of dictionary Item terms by function/task. These groups provide an efficient way in which to insert items into a transaction. Unlike Aggregate Item members, which remain related and cannot be separated, Sequence items, once inserted, can be deleted/moved as required

How they are used in Health One

Insert Sequence button

Sequences are used in **HEALTH *one*** to insert a group of items into the current transaction. They have their own icon on the Item Panel toolbar. The example transaction below illustrates the use of the *SOAP* sequence of items.

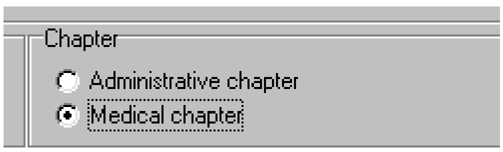


Editing Techniques

Editing consists of creating/deleting/amending groups of dictionary terms.

Creating a Sequence Group

1) Open the Configuration tool and login
2) Select the menu sequence **File / Open / Sequence**
3) Select the chapter in which this group will be available.



Note: Health One chapters are Administration and Medical. Sequence items will be available only in the chapter in which they are created.

Sequences

Editing Techniques

Creating a Sequence Group

4) Enter the name of the Item term, which will form the title for the sequence group in the term filter box.
5) Locate the term required in the term window and drag this into the group window in the top right of the screen. This will automatically be included as the first entry in the member window for this Sequence group.

Note: Aggregate Items cannot be used as basis for a new sequence.

Adding Members to a Sequence Group

Sequence members can be selected from dictionary Item terms or Aggregate item terms.

1) Select the group to be edited by clicking on its name in the group window. Top right.

ADDING DICTIONARY ITEM TERMS

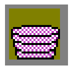
2) Enter the name of the member Item term in the *Term* filter box.
3) Locate the term required in the term window and drag this into the *Member* window in the bottom right of the screen.
4) Repeat for other member terms as required.

ADDING AGGREGATE ITEMS

2) Locate the aggregate item required in the Aggregate Window in the bottom left of the screen. Select and drag this into the *Member* window in the bottom right of the screen.
4) Repeat for other member terms as required.

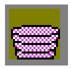
Deleting Members from a Sequence Group

1) Select the group to be edited by clicking on its name in the group window.
2) Drag the group member item to be removed into the waste bin at the bottom of the window.



3) Confirm deletion when prompted.

Deleting a Sequence Group



1) Select the group to be deleted by clicking on its name in the group window. Drag into the waste bin
2) Confirm deletion when prompted.

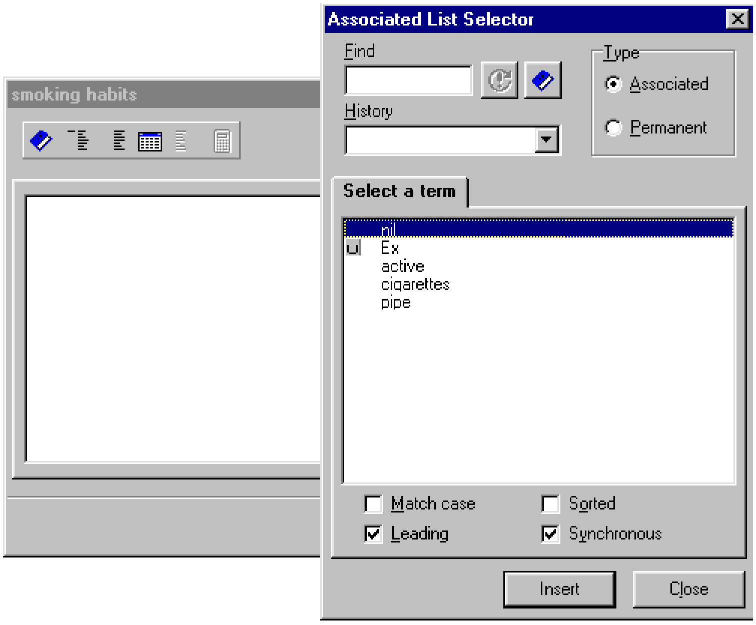
Closing the Sequence

1) Select the menu sequence **File / Close**. Accept the Save Changes dialogue box to make the change permanent.

Associated Lists

Introduction

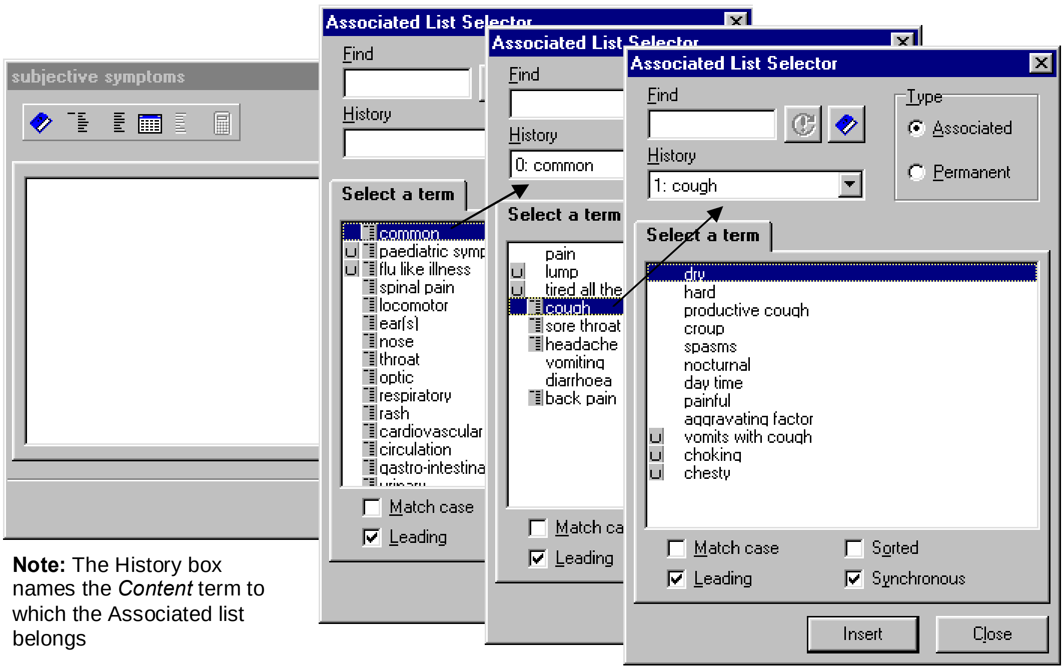
In their simplest form Associated lists are lists of dictionary *Content* terms that are linked to a relevant dictionary *Item* term. Whenever the Item is placed into a transaction its associated list of *Content* terms will appear. Opposite the Item *smoking habits:* is used as an example:



Note: The Associated list box does not use icons to differentiate between *Item* and *Content* dictionary terms because they are all *Content* terms, however; the icon is used to show that ***Ex*** is a User category term.

Sub Associated Lists

In addition to linking Content terms to an Item term, as above, content terms can be linked to other content terms, thus forming sub associated lists.



Note: The History box names the *Content* term to which the Associated list belongs

Note: This illustration is for explanative purposes; in reality only one Associated List box will appear at any one time.

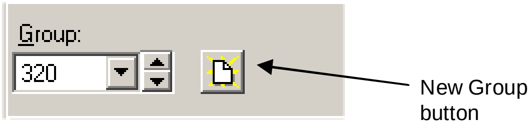
Editing Techniques

Creating an Associated List Group

It is important to realise that a dictionary term can only have one associated list; however, the same list can be assigned to more than one term (see note below). Once assigned, the term is said to be a *calling term* for that list. Each list is assigned a group number (by **HEALTH *one***) when created.

1) Open the Configuration tool and login
2) Select the menu sequence **File / Open / Associated list**. Alternatively, click on the *Associated List* button on the toolbar.
3) Click on the *New Group* button on the right of the screen. See **Fig. 5** below.

FIGURE 5

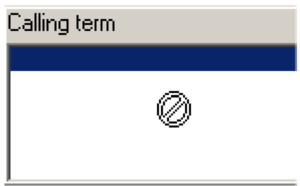


4) Enter the name of the term that will *call* the new group in the term filter box.
5) Locate the term required in the term window and drag this into the *calling term* window in the top right of the screen.

Assigning Multiple Calling Terms

In cases where more than one term is to call the same list repeat steps 4) and 5) above.

Note: If you try to assign a term that already has an existing list as a *calling* term for the new group a *not allowed* icon will appear when you attempt to drag this term into the *Calling term* window.



To check if a term is already assigned to a list type its name in the *Term* filter box and select it in the term window. Now select the menu option: **Action / Find me as calling term**. If a list appears you know that it is already assigned. Otherwise the *Associated List Not Found* dialogue box will appear. See **Fig. 6**

FIGURE 6

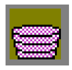
Editing Techniques

Adding Member Items to an Associated List Group

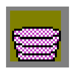
Members can be selected from the term window.

1) Locate the group that is to be edited by typing the name of its *Calling term* into the *Term* filter box.
2) Locate the *Calling term* in the term window and select it. Select the menu option: **Action / Find me as calling term**
3) Enter the name of the member Item term in the *Term* filter box.
4) Locate the term required in the term window and drag this into the *Member window* in the bottom right of the screen.
5) Repeat steps 3) ï 4) for other member terms as required.

Deleting Members from a Group

1) Locate the group that is to be edited by typing the name of its *Calling term* into the *Term* filter box.
2) Locate the *Calling term* in the term window and select it. Select the menu option: **Action / Find me as calling term**
3) Drag the group member item to be removed into the waste bin at the bottom of the window. 

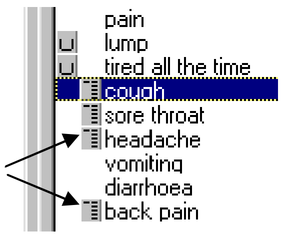
Deleting a Calling Term / Associated List Group

1) Locate the group that is to be edited by typing the name of its *Calling term* into the *Term* filter box.
2) Locate the *Calling term* in the term window and select it. Select the menu option: **Action / Find me as calling term**
3) Drag the *Calling term* item to be removed from the **Calling term** window into the waste bin at the bottom of the window. 

Note: If all calling terms are deleted for an Associated List Group the group will automatically be deleted.

Creating Sub Associated Lists

This is easier than it sounds. Whenever a term that has its own associated list (i.e. is a calling term for an existing list) is used as a member of another list this will form a sub associated list relationship. In **HEALTH *one*** this relationship is indicated by a special icon next to the member term when the associated list is used.



Closing the Associated List

1) Select the menu sequence **File / Close**. Accept the Save Changes dialogue box to make the change permanent.

Permanent List

Introduction

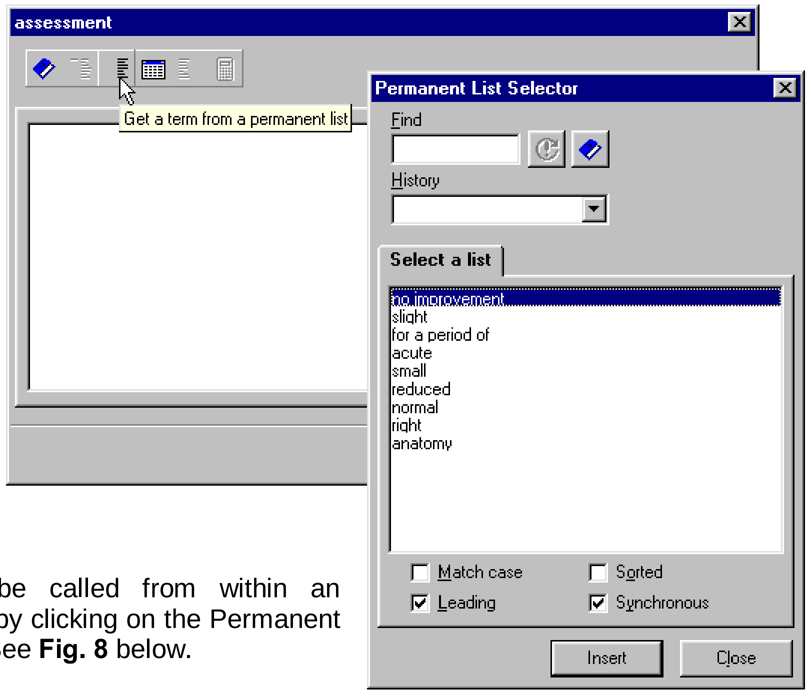
The Permanent List is a list of adjectives and phrases used primarily to further qualify the contents of an item. Each list is comprised of a group and its associated members. The number of groups permissible is nine, which are all initially provided with **HEALTH *one***. It is possible to create new groups provided an existing one is deleted first.

Group members can be any term from the dictionary. If a member item has an associated list (see previous section) this will form a sub list for that member.

How it is Used in **HEALTH *one***

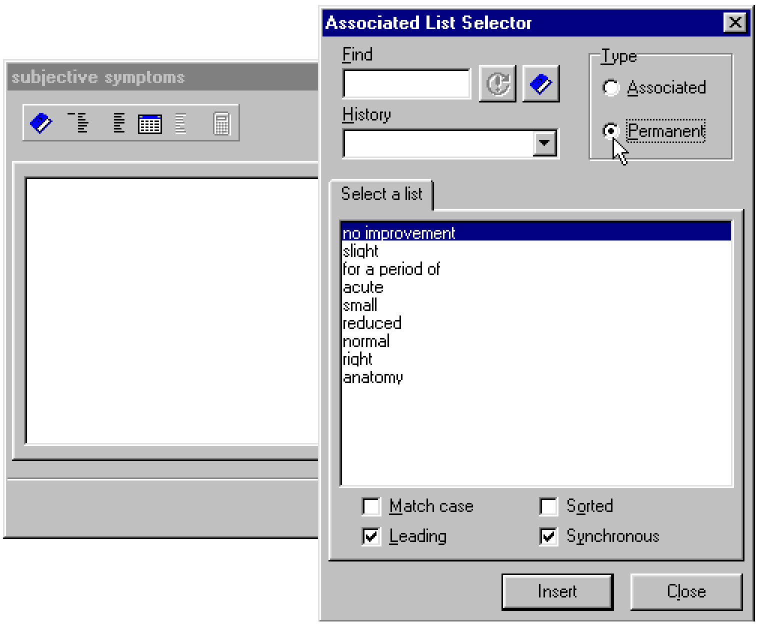
FIGURE 7

There are two ways the Permanent List is used within **HEALTH *one***. Firstly, whenever an appropriate item dialogue box is opened by clicking on its respective button (illustrated opposite) on the toolbar.



Secondly, it can be called from within an Associated List box by clicking on the Permanent Type radio button. See **Fig. 8** below.

FIGURE 8

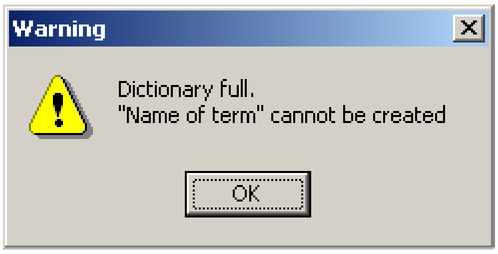


Permanent List

Editing Techniques

Creating a Permanent List Group

Only nine permanent list groups can exist. An existing group must first be deleted before a new one can be created (see below). Attempts to create more than nine groups will result in the following error message.



1) Open the Configuration tool and login.
2) Select the menu sequence **File / Open / Permanent list**
3) Enter the name of the term that will form the title for the new group in the term filter box.
5) Locate the term required in the term window and drag this into the *Group* window in the top right of the screen.

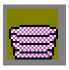
Adding Members to a Permanent List Group

Members can be selected from any dictionary term category. In cases where *Item* category terms are used there name will be used as text when selected from the Permanent List.

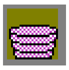
1) Select the group to be edited by clicking on its name in the group window. Top right.
2) Enter the name of the member Item term in the *Term* filter box.
3) Locate the term required in the term window and drag this into the *Member window* in the bottom right of the screen.
4) Repeat for other member terms as required.

Deleting Members from a Permanent List Group

1) Select the group to be edited by clicking on its name in the group window.
2) Drag the group member item to be removed into the waste bin at the bottom of the window.



Deleting a Permanent List Group



1) Select the group to be deleted by clicking on its name in the group window. Drag into the waste bin
2) Confirm deletion when prompted.

Closing the Permanent List

1) Select the menu sequence **File / Close**. Accept the Save Changes dialogue box to make the change permanent.

Grids

Introduction

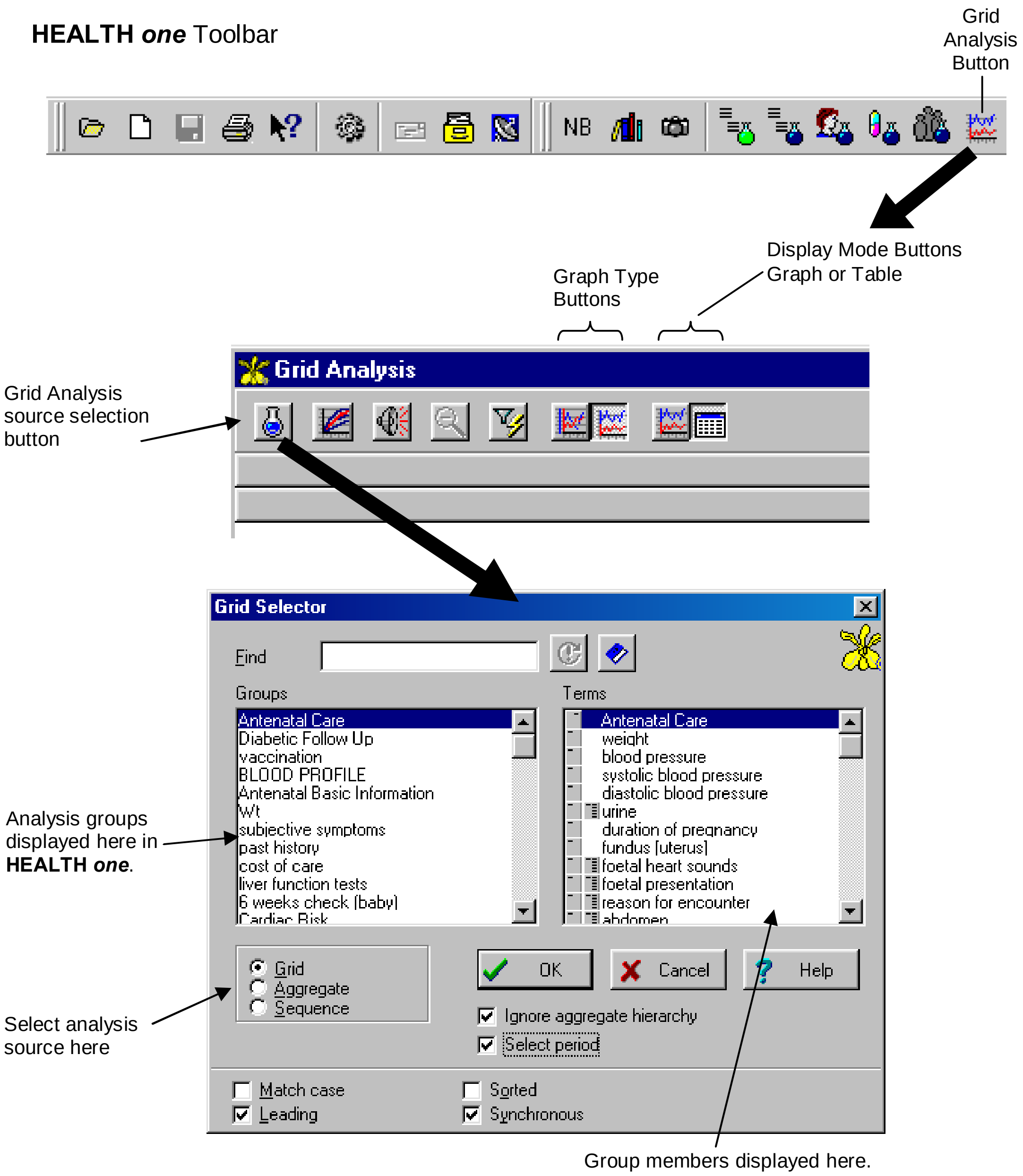
INTRO
8- 12

Grids are used to form analytical groupings which are then used in **HEALTH *one*** to create graphs and tables of extracted values via the *Grid Analysis Tool* ï Refer to section 8 in the *User Guide* for a detailed description of using Grid Analysis. Each list is comprised of a group and its associated members. Only *Item* terms can used to form Grid Groups and Members.

How they are used in Health one

This is discussed in detail in the *User Guide* section 8. In brief the grid analysis groups constructed using the Configuration Tool are selectable in **HEALTH *one*** via the Grid Analysis button on the toolbar:

HEALTH *one* Toolbar



Editing Techniques

Creating a Grid Group

1) Open the Configuration tool and login
2) Select the menu sequence **File / Open / Grid**
3) Enter the name of the Item term that will form the title for the grid group in the term filter box.
4) Locate the term required in the term window and drag this into the group window in the top right of the screen. This will automatically be included as the first entry in the member window for this Sequence group.

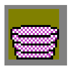
Adding Members to a Grid Group

Grid members can only be selected from dictionary Item terms.

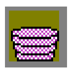
1) Select the group to be edited by clicking on its name in the group window. Top right.
2) Enter the name of the member Item term in the *Term* filter box.
3) Locate the term required in the term window and drag this into the *member* window in the bottom right of the screen.
4) Repeat for other member terms as required.

Deleting Members from a Grid Group

1) Select the group to be edited by clicking on its name in the group window.
2) Drag the group member item to be removed into the waste bin at the bottom of the window.



Deleting a Grid Group



1) Select the group to be deleted by clicking on its name in the group window. Drag into the waste bin
2) Confirm deletion when prompted.

Closing the Grid

1) Select the menu sequence **File / Close**. Accept the Save Changes dialogue box to make the change permanent.

Own Notes

Dynamic Elements

- Setup Transactions
- Setup Items

Dynamic Elements

Introduction

There are two types of dynamic elements: *Setup Transaction* and *Setup Item*.

Both types have a common purpose that is to instruct **HEALTH *one*** to automatically insert sequences and/or aggregate Items dependent upon values set by the user.

In the case of *Setup Transactions* **HEALTH *one*** will automatically insert one or more specified sequences and/or aggregate items into the *new transaction* when it is created dependent upon its *type* or *name*.

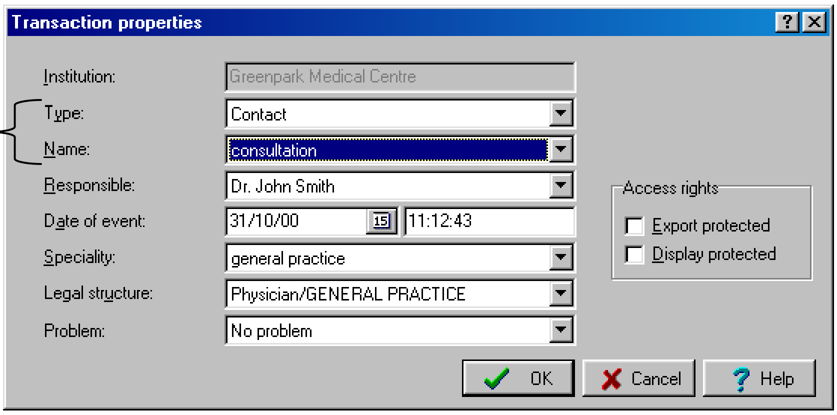
Setup Items are more sophisticated in that the response entered for an item can be tested and dependent upon its value **HEALTH *one*** can insert additional sequences and/or aggregate items into the *current transaction*.

How they are used in HEALTH one

SETUP TRANSACTIONS

FIGURE 9

New transaction dialogue box



The *Setup Transaction* action occurs when a new transaction is created. **HEALTH *one*** monitors the *Type* and *Name* of each transaction created and if a match is found with a *Setup Transaction* setting the relevant sequences and/or aggregate items are automatically inserted into the new transaction.

For example, many users consistently add the *Basic Medical Information* sequence whenever a **Basic Medical Information** *type* of transaction is created. Or, the SOAP sequence whenever a **Contact** *type* **Consultation** *named* transaction is created. Both of the above examples can be set to automatically occur and thereby save considerable repetition of action.

SETUP ITEMS

HEALTH *one* monitors the response typed for each item and if a match is found with a *Setup Item* setting the specified sequences and/or aggregate items are automatically inserted into the current transaction. In addition, the *Setup Item* action can optionally specify an initial value for the inserted items. In the case of a sequence an initial value can be specified for any item within the inserted sequence.

Typical uses would be when a result of a certain value (perhaps an abnormal lab result) warrants further exploration and an additional sequence of items is needed to document this. As soon as the abnormal result is entered **HEALTH *one*** automatically inserts the desired additional sequence.

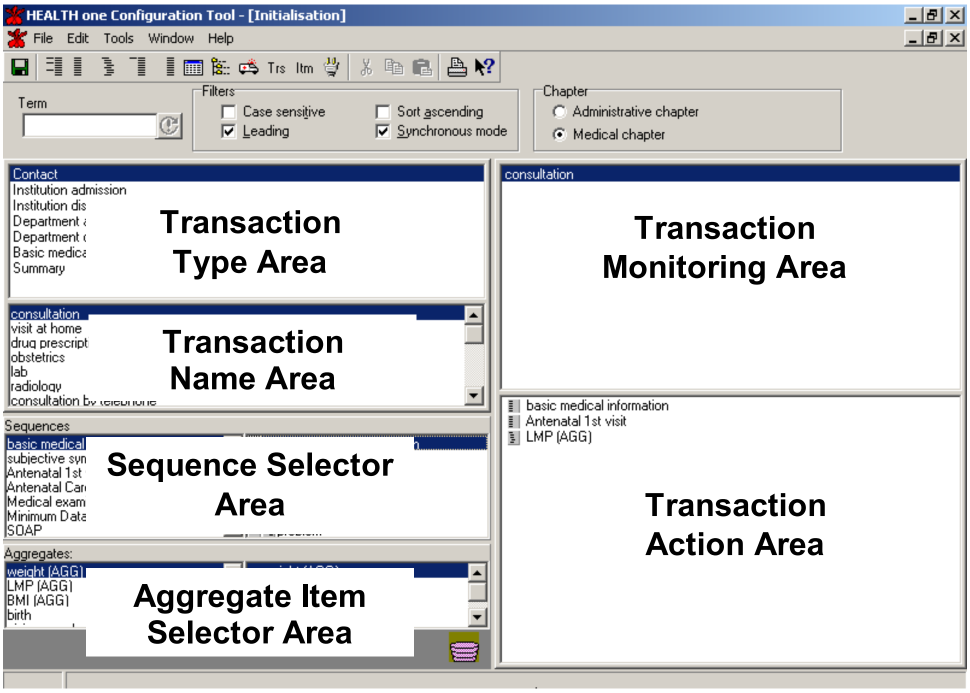
Setup Transaction Editing Techniques

Specifying a Monitored Transaction

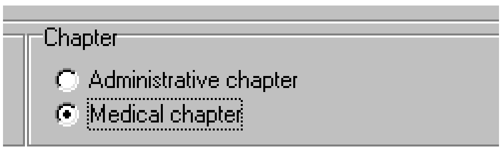
1) Open the Configuration tool and login
2) Select the menu sequence **File / Open / Setup transactions**

PRINCIPAL SETUP TRANSACTION SCREEN AREAS

FIGURE 10



3) Select the chapter to which the monitored transaction belongs.



4) Select the transaction to be monitored either by type, in the *Transaction Type Area*, or name in the *Transaction Name Area* and drag into the *Transaction Monitoring Area*

Adding Sequences/Aggregate Items

1) Select the transaction in the *Transaction Monitoring* Area.
2) Locate the sequence or aggregate item to be inserted inside their respective selector Areas and drag into the *Transaction Action Area*
3) Repeat step 2) for other sequences or aggregate items as required.

Setup Transaction Editing Techniques

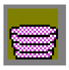
After the new Setup Transaction has been defined, close the Configuration Tool and open **HEALTH *one*** and test that it is working correctly.

Adding Additional Sequences/Aggregate Items

1) Select the transaction in the *Transaction Monitoring Area*.
2) Locate the sequence or aggregate item to be inserted and drag into the *Transaction Action Area*
3) Repeat step 2) for other sequences or aggregate items as required.

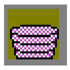
Deleting Sequences/Aggregate Items

1) Select the transaction in the *Transaction Monitoring Area*.
2) Locate the sequence or aggregate item to be deleted in the *Transaction Action Area*
3) Drag into the waste bin at the bottom of the window.



Deleting a Setup Transaction Action

1) Select the transaction in the *Transaction Monitoring Area*.
2) Drag into the waste bin at the bottom of the window.



Closing the Setup Transaction Screen

1) Select the menu sequence **File / Close**. Accept the Save Changes dialogue box to make the change permanent.

Note: **HEALTH *one*** can perform these actions for more than one transaction. Each transaction name/type dragged into the *Transaction Monitoring Area* will be monitored. The distinction between when adding sequences/aggregate items for one as opposed to another is to ensure that it is **selected** in the *transaction monitoring area.*

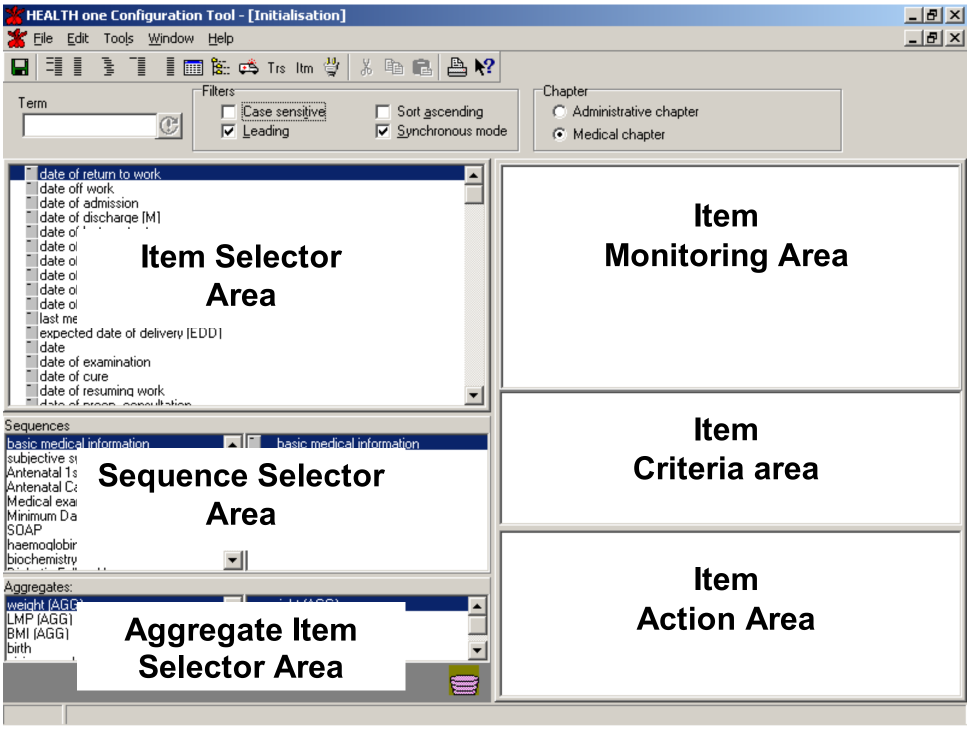
Setup Item Editing Techniques

Specifying the Items to be Monitored

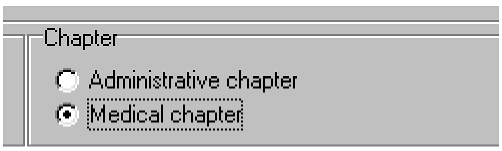
1) Open the Configuration tool and login
2) Select the menu sequence **File / Open / Setup Items**

PRINCIPAL AREAS OF THE SETUP ITEM SCREEN

FIGURE 11



3) Select the chapter to which the monitored transaction belongs.



4) Select the Item to be monitored in the *Item Selector Area*, and drag into the *Item Monitoring Area*

Setup Item Editing Techniques

Creating Criteria

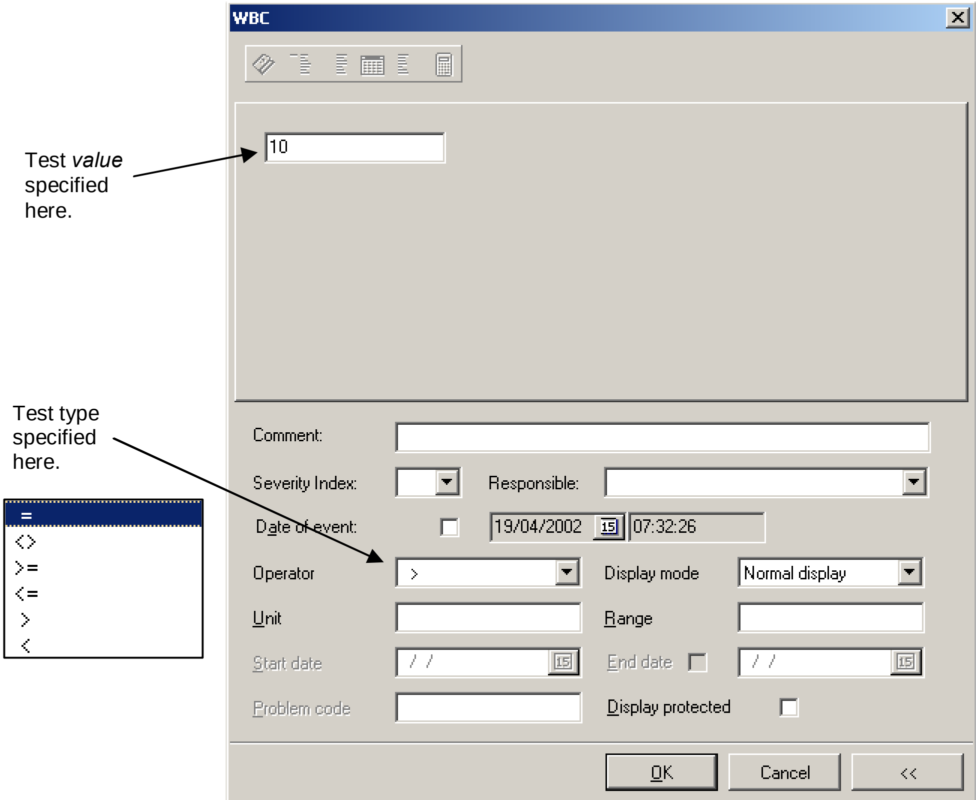
Each item has a criteria window that is used to specify the *value* and *test* to be applied. This is displayed when the item name is double clicked in the *Item Monitoring* area.

1) Double click the Item in the *Item Monitoring* Area.

   Below the White Blood Cell Count item is used as an example:

FIGURE 12

Item Criteria Window



In **fig. 12** the only relevant information to be entered is the *value* to be tested and the *test* (Operator) to be applied. The *Range* box does not imply a range can be tested for; it is used for lab results, as is the *Unit* box, to display normal ranges. See *Specifying Default Values* later in this section for an example of using these.

VALUE

This is a numeric entry treated as positive unless signed with a negative hyphen (-).

OPERATORS

These are standard symbols as follows:

Symbol	Meaning
=	Equals
<>	Not equals
>=	Greater than or equals
<=	Less than or equals
>	Greater than
<	Less than

Creating Criteria cntd

Note: If the operator box for an item that holds numeric data displays only the = or <> options, open the item in the dictionary and change its Entry Style from *Free Text* to *Numeric*. Now the full list of operator functions will be displayed.

2) Complete the Criteria Window as required and click **OK**.

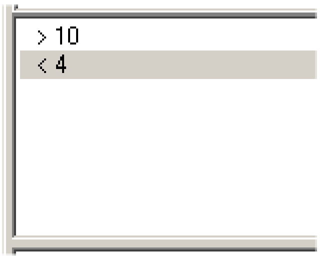
   The criterion specified now appears in the Item Criteria Area of the screen.

FIGURE 13

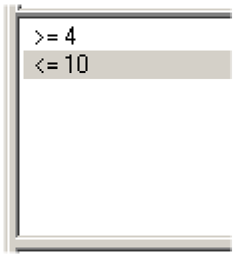
Criteria Area with a criterion entry.

Specifying Additional Criteria

Whenever an item name is double clicked in the *Item Monitoring Area* a NEW criteria window is opened. Each criterion can be assigned different sequences/aggregate items, thereby enabling a different response dependent upon the item value.



Be careful when constructing multiple criteria. The first criterion is tested for initially and the second only applied if the first is not met. See the example opposite, the second entry only comes into effect if the value entered is 3 or less, because the first criterion covers all values 4 or greater. This illustrates that multiple criteria have a logical **OR** effect.

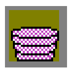


Editing Criteria

Delete the old criteria first (see below) and re-specify by creating a new criteria entry as outlined earlier.

Deleting Criteria

1) Select the criterion to be deleted in the *Item Criteria Area* and drag into the wastebasket.



Setup Item Editing Techniques

Adding Sequences/Aggregate Items

1) Select the Item in the *Item Monitoring Area*.
2) Select the criterion in the *Item Criteria Area*.
3) Locate the sequence or aggregate item to be inserted inside their respective selector areas and drag into the *Item Action Area*.
4) Repeat step 3) for other sequences or aggregate items as required.
5) Repeat steps 2) to 3) for other criterion as required.

Specifying Default Values

The item *monitoring, criteria* and *action* areas of the Setup Item screen define the complete information required to monitor, test and, based upon the test result, finally insert a sequence and/or aggregate item into the current transaction.

In addition to this it is possible to assign default values to the aggregate item or items associated with a selected sequence. These values and settings will automatically be assigned as the sequence and or aggregate item are inserted into the current transaction.

The following settings can be specified: *Value*, *Comments*, *Severity Index* and *Display Mode*.

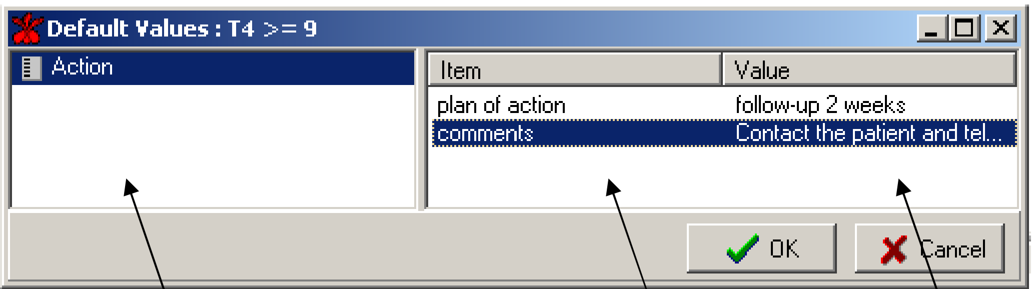
To specify these settings:

1) Ensure that a sequence or aggregate item has been associated with a criterion.
2) Double click the criterion.

   The window that next appears shows the criterion in the title bar and two columns of information. The left column lists the sequences/aggregate item(s) assigned to this criterion and the right will show their respective members.

FIGURE 14

Criterion default value window



Sequences and/or aggregate items assigned to this criterion listed in this column. In the above example the sequence *Action* is displayed.

The sequence *Action* has two members: *Plan of action* and *comments*. Double click items in this column to specify default values for them.

Default values

3) Display the members of a sequence or aggregate item by selecting its name in the left column.

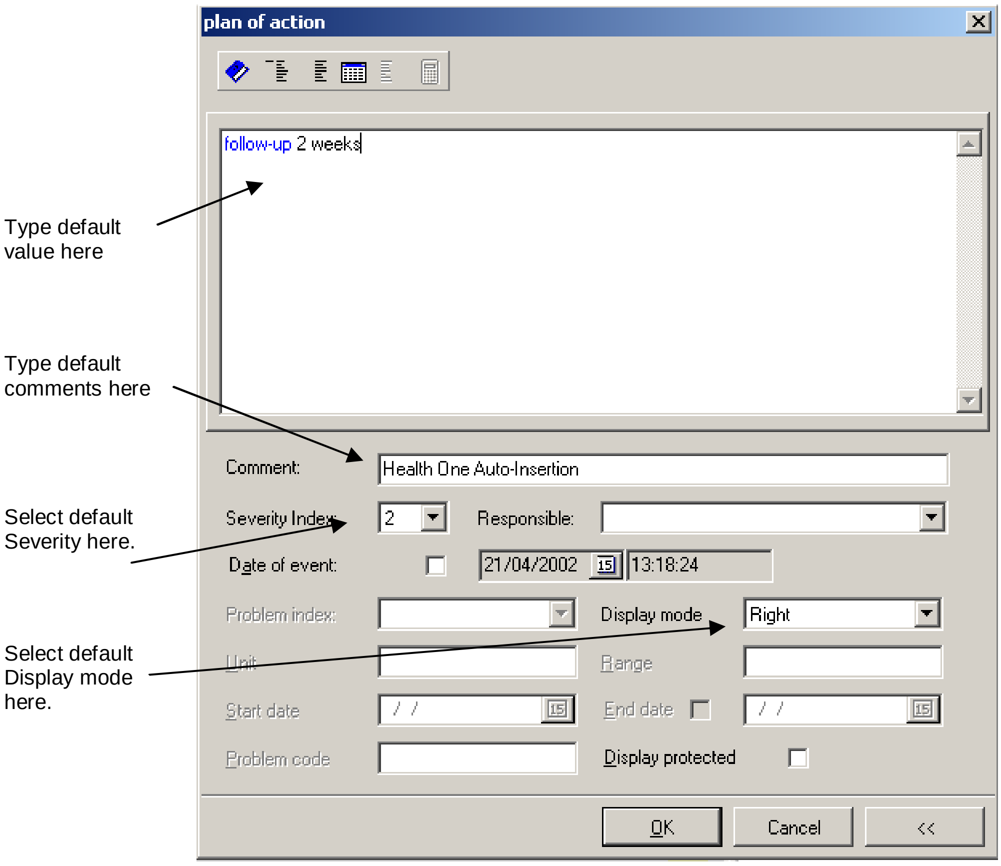
Setup Item Editing Techniques

Specifying Default Values cntd

4) Double click a member item in the right column to display its default settings window. See **fig. 14**

FIGURE 15

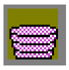
Plan of Action default value window



5) Set the default values as required. Click **OK**, **OK**.

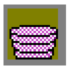
Deleting Sequences/Aggregate Items

1) Select the Sequence / Aggregate Item in the *Item Action Area* and drag into the wastebasket.



Deleting Items to be Monitored

1) Select the Item in the *Item Monitoring Area* and drag into the wastebasket.



Closing the Setup Items Screen

1) Select the menu sequence **File / Close**. Accept the Save Changes dialogue box to make the change permanent.

Own Notes

Miscellaneous

- Transaction Names
    - How it is used in **HEALTH *one***
    - Editing Techniques

- Medical Speciality Names
    - How it is used in **HEALTH *one***
    - Editing Techniques

Miscellaneous Features

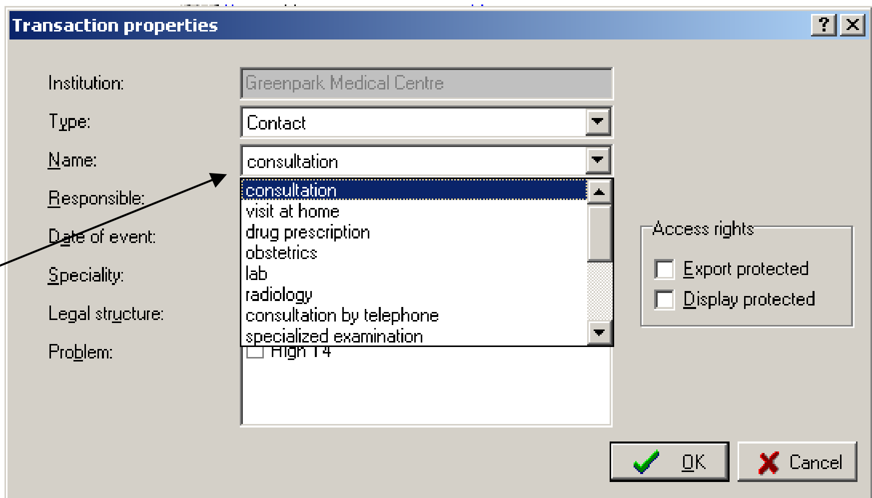
Selecting Transaction Names

Introduction

This feature allows the contents of the transaction name list to be specified. This list is displayed whenever a new transaction is created.

How it is used in HEALTH one

Whenever a transaction is created its properties dialogue box is displayed. One field that can be set is the *Transaction Name.* It is the content of this list that this feature controls.



Transaction Name List Editing Techniques

Adding Members to the list

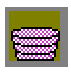
1) Open the Configuration tool and login
2) Select the menu sequence **File / Open / Transaction name**

   The Transaction Name window appears. The left column displays the possible transaction names and the right column shows those names that have been selected to appear in the list.

3) Select the transaction name required in the left column and drag to the right column.

Deleting Members from the list

1) Select the transaction name to be deleted in the right column and drag into the wastebasket.



Closing the Transaction Name Screen

1) Select the menu sequence **File / Close.** Accept the Save Changes dialogue box to make the change permanent.

Miscellaneous Features

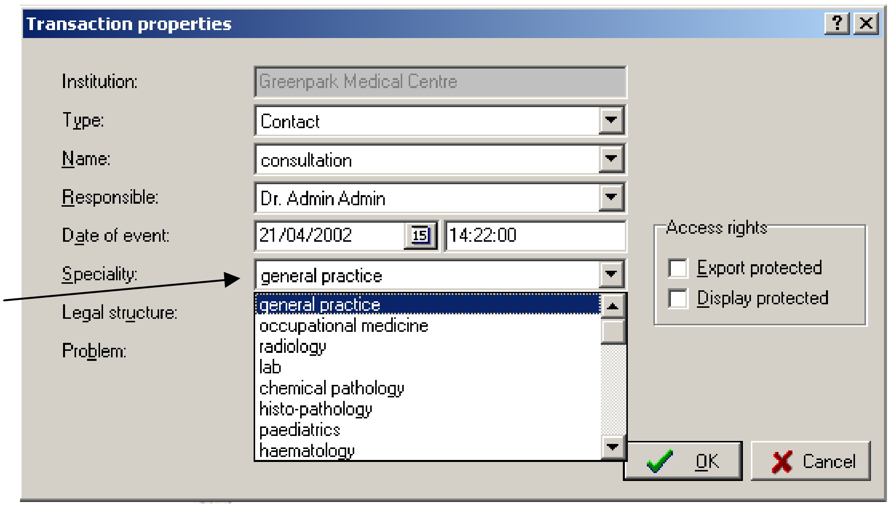
Selecting Medical Speciality Names

Introduction

This feature allows the contents of the transaction medical speciality list to be specified. This list is displayed whenever a new transaction is created.

How they are used in HEALTH one

Whenever a transaction is created its properties dialogue box is displayed. One field that can be set is the *Speciality (medical)*. It is the content of this list that this feature controls.



Medical Speciality List Editing Techniques

Adding Members to the list

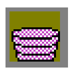
1) Open the Configuration tool and login
2) Select the menu sequence **File / Open / Medical speciality**

   The Medical Speciality window appears. The left column displays the possible speciality names and the right column shows those names that have been selected to appear in the list.

3) Select the speciality name required in the left column and drag to the right column.

Deleting Members from the list

1) Select the speciality name to be deleted in the right column and drag into the wastebasket.



Closing the Medical Speciality Screen

1) Select the menu sequence **File / Close**. Accept the Save Changes dialogue box to make the change permanent.

Own Notes

Appendix

- Extended Entry Styles
    - The Calculation Item
    - The Database Item
    - The Free Text Item

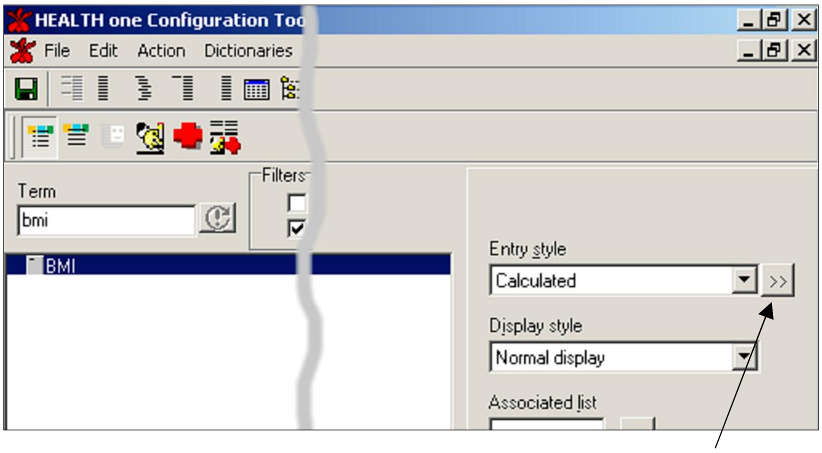
Appendix A

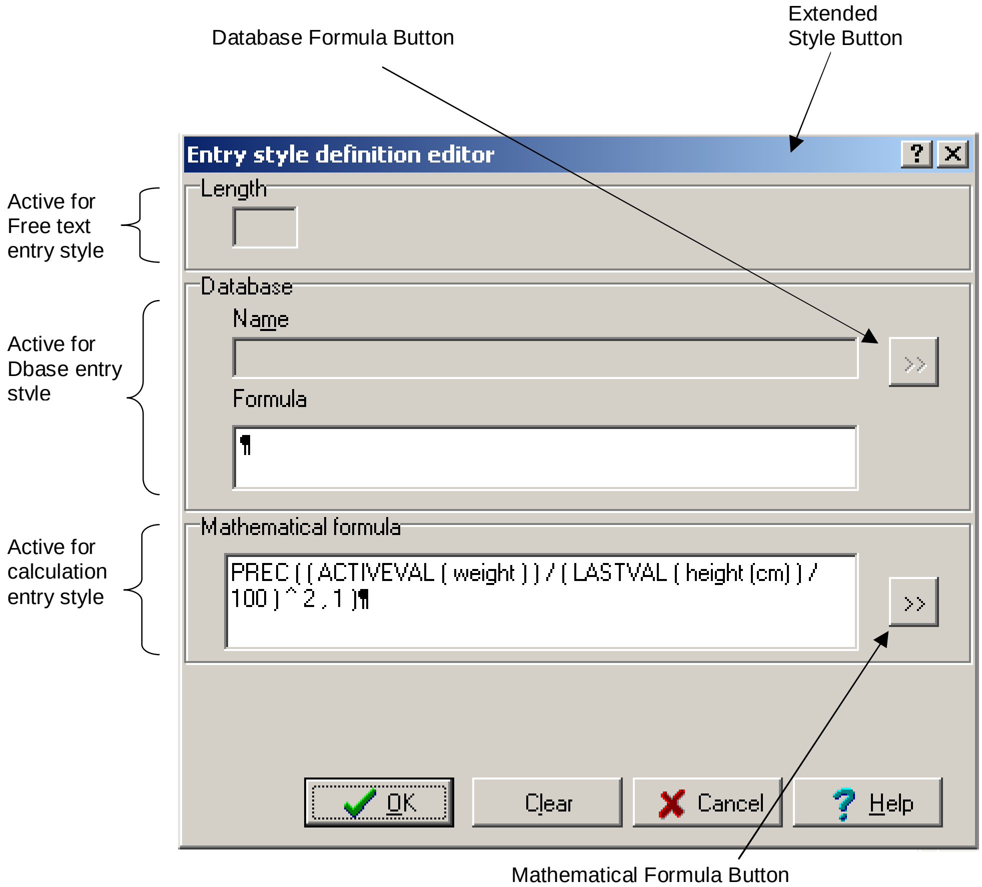
Extended Entry Styles

Calculation

FIGURE A1

Whenever a dictionary *Item* term is assigned an entry style of *Calculated*, *Free Text or Dbase* the Extended Style Button activates to allow the *Style Definition Editor* window to be displayed.





Defining a Calculation

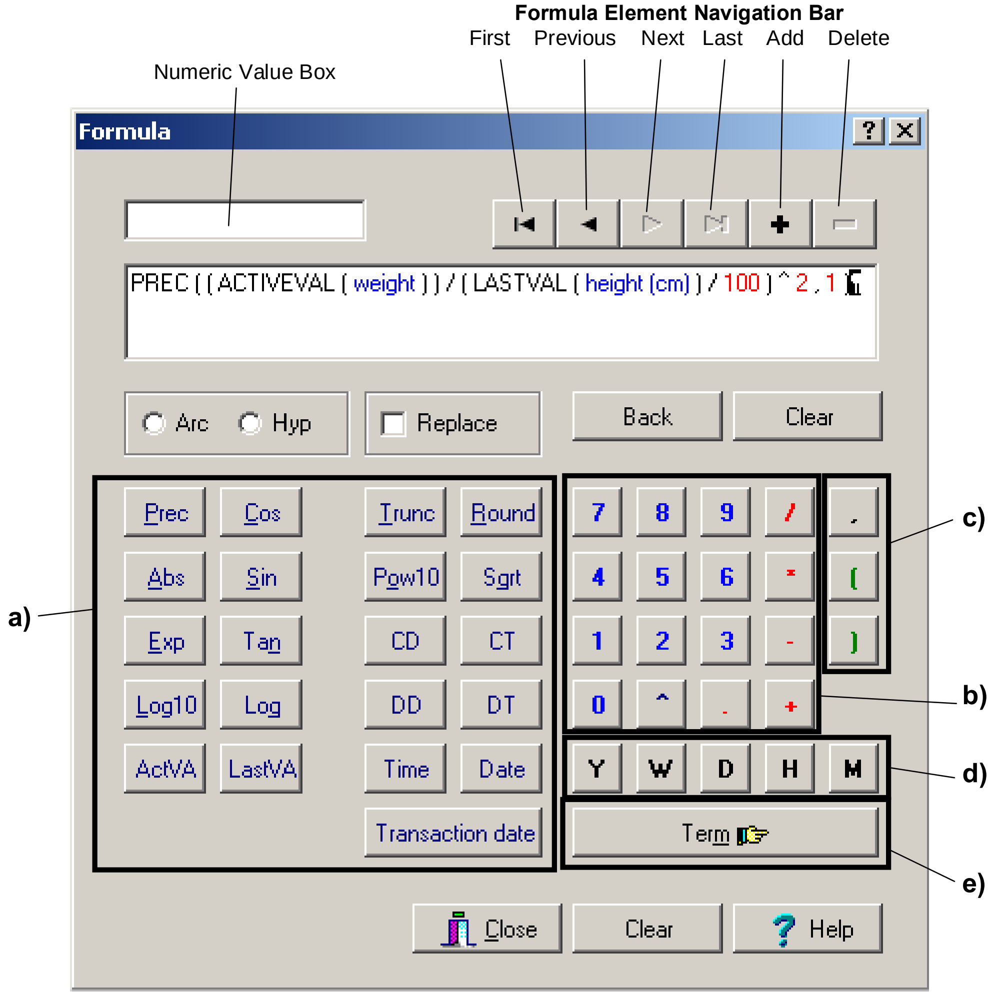
1) Assign the *Calculation* entry style to a dictionary item term to be calculated.
2) Click on the extended style button to open the **Style Definition Editor** window.
3) Click on the Mathematical Formula Button to open the **Formula** window. See **Fig. A2**.

Appendix A

Extended Entry Styles

Defining a Calculation

FIGURE A2



Principal Areas of the Formula Window

a) Functions			
Prec Precision	**Prec (x,n)** X=formula n=places of precision	Cos Cosine	**Cos (x)** X=formula Returns cosine of x
Abs Absolute	**Abs(x)** x=formula Returns absolute x	Sin Sine	**Sin (x)** X=formula Returns sine of x
Exp Exponential	**Exp(x)** x=formula Returns exponential x	Tan	**Tan (x)** X=formula Returns Tan of x
Log10 Log 10	**Log10(x)** x=formula Returns Log10 of x	Log	**Log (x)** X=formula Returns log of x
ActVA Active Value	**Actival(item)** Returns the value of *item* from the current transaction	LastVA Last Value	**Lastval(item)** Returns the last value of *item*

Extended Entry Styles

Defining a Calculation

PRINCIPAL AREAS OF THE FORMULA WINDOW

a) Functions			
Round Round	**Round (x)** x=formula Rounds x to nearest whole number	Sqrt Square Root	**Sqrt (x)** X=formula Returns square root of x
DT Difference Time	**Difftime(time1,time2,mode)** Returns the difference between two times by mode: H=Hours, M=Minutes. See table **d)**	Date Date	**Date** Insert the current date
DD Difference Date	**Diffdate(date1,date2,mode)** Returns the difference between two dates by mode: Y=Year, W=Week, D=Day. See table **d)**	Time Time	Inserts current time into formula
Pow10 Power of 10	**Pow10 (x)** X=formula Raises x to the power of 10	Trunc Truncate	**Trunc (x)** X=formula Truncates x
CT Calculate Time	**CalcTime (time,n)**	CD Calc Date	**CalcDate (date,n)**
Transaction date Transaction Date	Click to insert the current transaction date into the formula.		

b) Numeric Pad and Operators			
/ Divide	- Subtract	. Decimal Place	0 > 9 Numeric Pad
* Multiply	+ Addition	^ Raise	**^2=**Squared **^3=**Cubed etc.

c) Formula Structure	
, Comma	( ) Parenthesis

d) Modes	
Y W D Date Modes	**Y** = Year **W** = Week **D** = Day
H M Time Modes	**H** = Hour **M** = Minute

e) Term
Term
Opens the **Insert Item** window to select a dictionary *item* term to insert into the formula.

Defining a Calculation

4) Create the formula as required.
5) Click close to return to the **Style Definition Editor** window.
6) Click **OK** to save the formula and return to the **Dictionary** window.
7) Select **File / Close** and answer Yes to save changes when prompted.

See the example calculation on the next page for formula construction techniques.

Appendix A

Extended Entry Styles

Example Calculation

Creating the Body Mass Index Formula

1) Open the dictionary via **File / Open / Term+**
2) Type: **BMI** in the term filter box.
3) Select the term **BMI**
4) If **BMI** does not have an entry style of *Calculation* select it now and click the **Apply** button.
   - *The Extended entry style button should now be active*

5) Click on the extended entry style button. See **fig. A1**.
   - *The Style Definition Editor window opens*
6) Click on the mathematical formula button to open the formula window.

The formula can now be entered:

7) Click on the **Presc** button
8) Click on the open parenthesis button **(** *TWICE*
9) Click on the button **Lastval**, click on **(** button again.
10) Click on the 

button. Find and select the term *weight,* **OK**.
11) Click the close parenthesis button **)** *TWICE*
12) Click on the divide button **/** , now click on the open parenthesis button **(**
13) 9) Click on the button **Lastval**, click on **(** button again.
14) Click on the 

button. Find and select the term *height (cm),* **OK**.
15) Click on the close parenthesis button **)**
16) Click the divide button once again **/**
17) Use the numeric pad and enter the value **100**, Now go to the formula navigation buttons at the top of the window (see **fig. A2**) and click on the  button to place the 100 into the formula.
18) Click **)** then **^** then click on numeric pad **2** and again click on  to place the 2 into the formula.
19) Now click on the comma button **,** and then numeric pad **1** click on the  again. Lastly click on the close parenthesis button **)**

If all has gone well you should now have the formula as illustrated in **Fig. A2**. Save the formula and try it out in **HEALTH *one***.

Experiment with editing the formula using the navigation and plus and minus buttons. A little experimentation here is better than a description.

Appendix A

Extended Entry Styles

Database Entry Style

The database entry style is used to display a database when the item opens. An example would be the ICD9 codes. Databases are managed independent of **HEALTH *one*** and placed in the folder *drive*:\honewin\dbf.

Databases supplied with the Irish Edition are :

ICD9.dbf
ICPC1.dbf
ICPC2.dbf
Travel.dbf

Most database programs allow data to be saved in .DBF format, as do spreadsheet programs like **EXCEL**, so it is quite easy for databases like hospital addresses, consultant name and telephone numbers, etc, to be constructed and linked into **HEALTH *one*** by the method described below. Simply place your own databases into the folder *drive*:\honewin\dbf.

The ICD9.dbf database will be used as an example.

Technique

First, choose an Item to link the database to. In this example the database ***ICD9.dbf*** will be liked to the item **Code**.

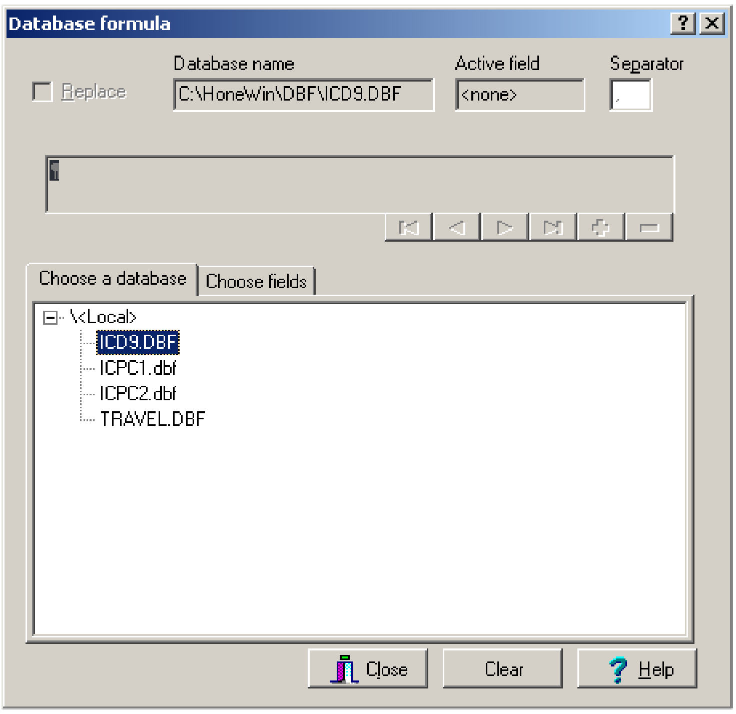
1) Open the dictionary via **File / Open / Term**
2) Type: **Cod** in the term filter box.
3) Select the term **Code**
4) If **Code** does not have an entry style of *Calculation* select it now and click the **Apply** button.
   - *The Extended entry style button should now be active*
5) Click on the extended entry style button. See **fig. A1**.
   - *The Style Definition Editor window opens*
6) Click on the database formula button to open the formula window.

See **Fig, A3**

Extended Entry Styles

Database Entry Style

FIGURE A3



TO SELECT A DATABASE

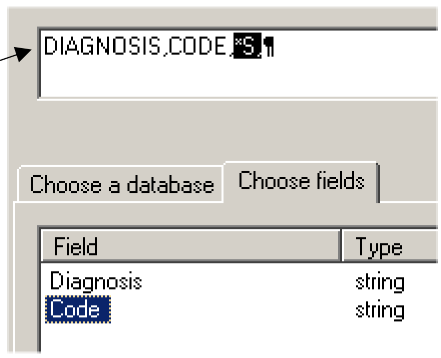
7) Ensure the **Choose a database** tab is active
8) Click on the ⊞ sign against the text **\<Local>** to display the databases in *drive*:\Honewin\DBF
9) Select the database required. In our example this is **ICD9.dbf**

TO SELECT THE FIELDS TO EXTRACT FROM THE DATABASE:

10) Click on the **Choose fields** tab
    - *The fields within the chosen database are now displayed.*

11) Double click the fields required in the order you would like them to appear in **HEALTH *one***. See **Fig. A4**. In our example ICD9.dbf only has two fields and we are going to extract both of them; however, it is not required that all fields be extracted.
    - *The name of each field double clicked is added to the extraction formula.*

FIGURE A4



Appendix A

Extended Entry Styles

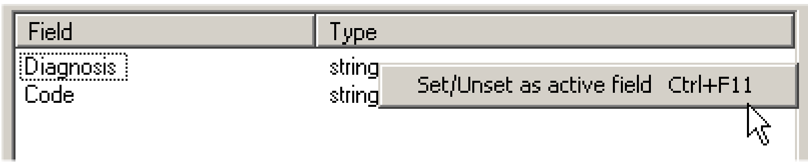
Database Entry Style

TO SET AN ACTIVE FIELD – USING ICD9.DBF AS AN EXAMPLE

When the database item, in our example the item **Code:**, is inserted into a **HEALTH *one*** transaction it will automatically open the database **icd9.dbf**. This has two fields, *diagnosis* and *code*, you can now select which of one of these will be used to search the database to locate the required information. For example, if you know the code and wish to find the diagnosis you would make the code field active, however, it is more likely that you would know the diagnosis and wish to locate its code, in which case the *diagnosis* field should be set to active.

12) In the **Choose fields** window **RIGHT CLICK** on the field name *Diagnosis* and set this as active. See **fig. A5**

FIGURE **A5**



- *The top of the Database Formula window will display the active database and field :*

SAVE THE DATABASE FORMULA

13) Click **Close** to return to the **Style Definition Editor** window.
14) Click **OK** to save the formula and return to the **Dictionary** window.
15) Select **File / Close** and answer Yes to save changes when prompted.

Appendix A

Extended Entry Styles

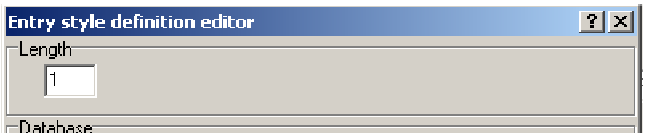
Free Text Entry Style

Whenever an item is assigned the *Free text* entry style it is possible to specify the length in characters the entry field should be. For example if the free text item requires a simple **Y** or **N** then the length would be 1 character.

Technique

1) Open the dictionary via **File / Open / Term**
2) Type the name of the term in the term filter box.
3) Select the term.
4) If the term does not have an entry style of *Freetext* select it now and click the **Apply** button.
   - *The Extended entry style button should now be active*
5) Click on the extended entry style button. See **fig. A6**.
   - *The Style Definition Editor window opens*

FIGURE A6



6) Type the length required in the length box.

SAVE THE FREE TEXT FORMULA

7) Click **OK** to save the formula and return to the **Dictionary** window.
8) Select **File / Close** and answer Yes to save changes when prompted.

Own Notes