

HEALTHone User Manual



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ADDRESS AND CONTACT NUMBERS

Helix Health Limited,

52, Broomhill Road,

Tallaght,

Dublin 24.

Ireland

Phone: (353)-1-4633000

Fax: (353)-1-4633011

Home Page: www.helixhealth.com

Email: info@helixhealth.com

Introducing HEALTHone™ Concepts & Structure

HEALTHone™ is structured around the Health Care Record and the various elements which form it. Being familiar with this and the terminology that is used will make using the product easier and the HEALTHone™ documentation straightforward to understand. Spending a few moments in this section before proceeding will be very worthwhile.

This session is primarily intended to introduce the basic structure and terminology used in HEALTHone™. The question how is addressed in the sessions that follow.

Health Care Record (HCR)

This is equivalent to a patient's folder in your manual records; in fact it is structured in a similar manner. Below is drawn a patients folder which we will compare to the HEALTHone™ Health Care Record (HCR) on the next page

Patient's Folder

Typical Structure

Front Cover

*Basic Administration
Information*

First Name

Surname

Name

Address

Sex

D.O.B

Occupation ...etc

Inside Front Cover

*Basic Medical
Information, i.e.*

Medical History

Surgical History

Tobacco

Alcohol Consumption

Blood Group

Allergies ...etc

Inserts

Consultation Records

e.g. S. O. A. P.

Health Care Record (HCR) ..continued

Health Care Record Structure

The HEALTHone™ Health Care Record is divided into 2 chapters, Administrative and Medical, which contain one or more pages of information. Each chapter and page has an icon (small picture) that represents it on the HEALTHone™ screen. These icons are shown opposite the parts of the HCR they represent below:



Administrative Chapter

The first page of the Administrative Chapter contains the basic administration information needed to create the patients file, Name, Date of Birth, Sex, Address, Occupation etc. Similar to the front page of a patient's folder.



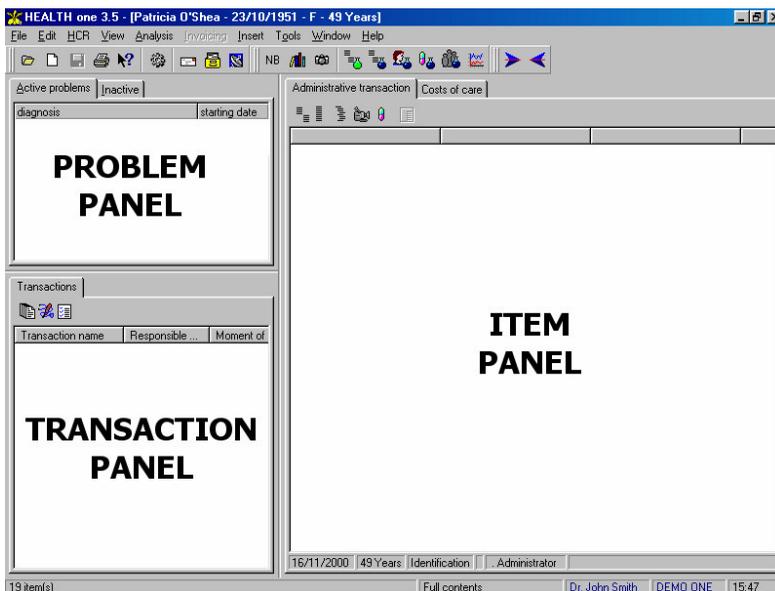
Medical Chapter

The first page in the Medical Chapter contains the Basic Medical Information, i.e. medical history, surgical history, allergies, blood group etc. This information is similar to the Inside Front Cover of a patient's folder.

Page Two onwards details each consultation/contact with the patient. It is worth noting that HEALTHone™ will enter a new page in this chapter for any reason to update the patient's record, i.e. a repeat script, a consultant's report, a call out to the patient at home etc, not just for a consultation where the patient visits the surgery. These are similar to the inserts used to record a patient's visit in your manual folder – the main difference being that HEALTHone™ uses a page per contact, whereas your folder inserts could record several contacts with the patient.

HCR Appearance on Screen

The HCR screen is divided into 3 principal areas called panels. These are the Problem, Transaction and Item Panels. We need concern ourselves only with the Transaction Panel, where the chapters and pages are displayed, and the Item Panel where the content of the page selected in the Transaction Panel is displayed.



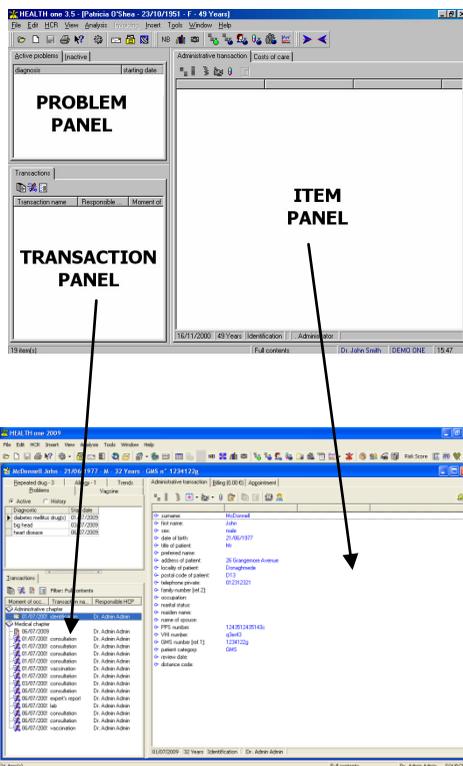
Health Care Record (HCR) ..continued

HCR Appearance on Screen

The Item Panel on the right will display the contents of any page that is currently selected in the Transaction Panel. We will explain later how to do this, but for now look at the next three figures. Each displays a different page in the Transaction panel (note the current page is shown

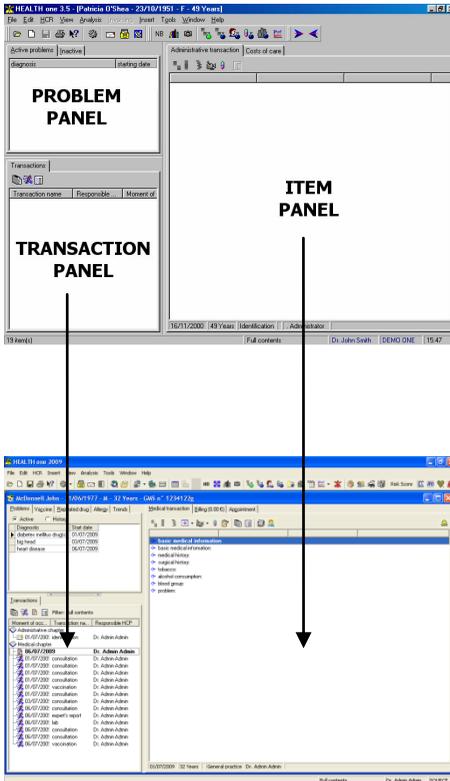
highlighted) and its content in the Item Panel.

Fig. 1 Administration Page



Administration page selected.

Fig. 2 Medical Chapter Page One
Basic Medical Information



First Medical Page Selected

The Transaction

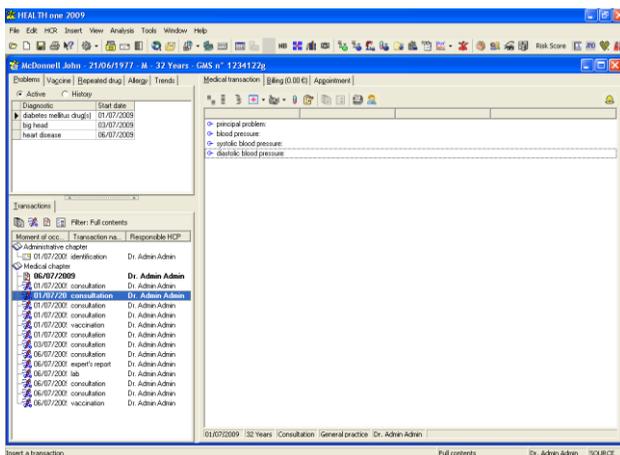
This is simply the general name given to any page in the Health Care Record.

Whenever a *new page* is required in the patient's HCR, we simply insert a new transaction. When a new medical transaction is created it will appear in the Transaction Panel underneath any existing medical transactions (these are listed in date order).

Look at the next illustration. Our patient visited once again and we recorded this in his/her HCR by the addition of a medical transaction. The technique of inserting a new transaction is explained in a future session.

The new transaction appears as a new *page* in the medical chapter:

Fig. 4 Medical Chapter Transaction Three
A Further Consultation



3rd Medical Transaction Selected

The Item

This is the name we use to describe the various types of information recorded in any transaction. Look at fig.4 above. The contents of the selected transaction (Medical Chapter Page 3) appears in the Item Panel on the right and is comprised of 4 separate Items: **subjective symptoms:**, **objective findings:**, **assessment:** and **plan of action:**. Items are easy to recognise by their distinctive icon. Each type of item has a unique name followed by a colon (:).



Fig.5 The assessment Item

You can think of an Item as being a container or box. The writing that appears to the right of the Item Name, i.e. after the colon (:), is its contents.



Fig.6 The assessment Item

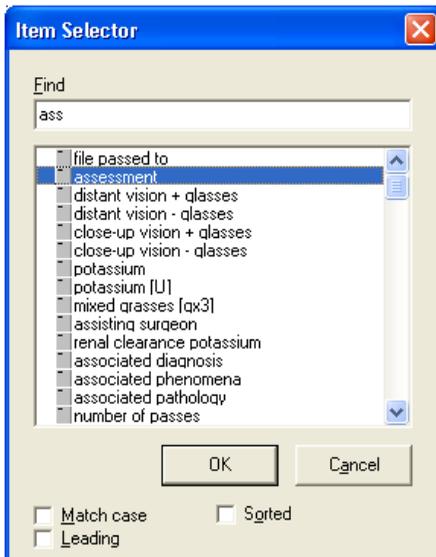
The Item ..continued

The Item Selector



HEALTHone™ has a dictionary of different Item Names. When you are entering information into a Transaction (page) in a patient's file you can add an item by selecting it from the dictionary. The Item Selector displays the dictionary contents and allows you to easily locate the Item you require.

The icon on the left will be displayed on your computer screen (exactly where it is displayed on the screen is not important at the moment) and by simply clicking on it with your mouse the Item Dictionary will be displayed:



To locate an item type here.

List reduces as you type

Click Ok to transfer item to the transaction panel of the current transaction.

Fig. 7 The Item Selector Window

The Sequence

A sequence is a predetermined set of Items that have been grouped together to suit a particular task.

With the exception of the Administration page all other transactions are blank when first created. That is they contain no Items at all. This allows for great flexibility, for example, when a pregnant female patient visits, you would create a new transaction in her file that adds a page in her Medical Chapter. Next you select the Sequence, which best suits the reason for her visit – this is done using the Sequence Selector.

The Sequence Selector



The Sequence Selector displays all the names of Sequences relevant to what you are currently doing, i.e. the list displayed will be dependent upon whether you are working on a page in the Administrative or Medical Chapters. Below is the list that will be displayed by the Sequence Selector for a medical transaction. In our example, the female patient is visiting for an antenatal check up and the 'Antenatal Care' Sequence is shown selected:

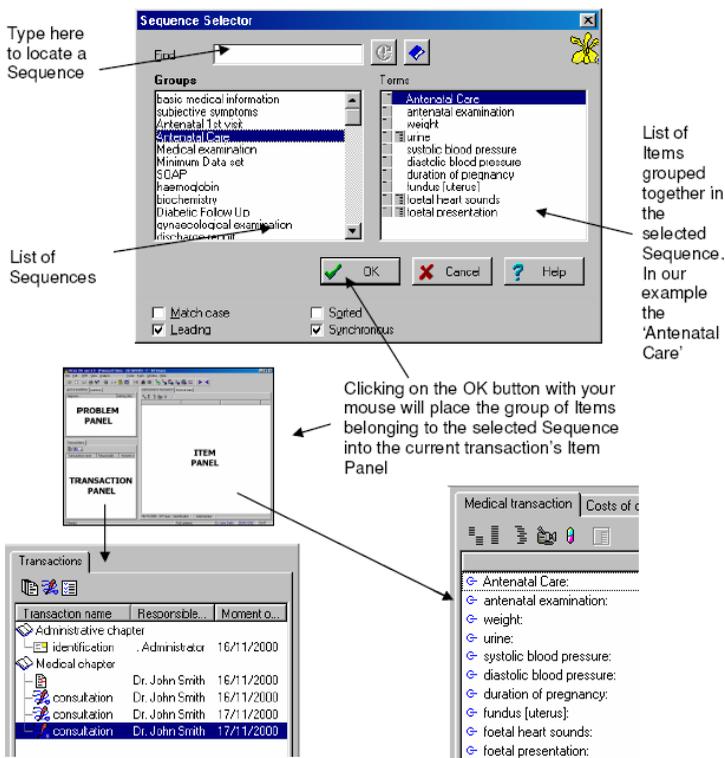


Fig.8 Sequence Selector Window

The Aggregate Item

We mentioned earlier that an Item could be considered as a box or container. The aggregate Item is no more than an Item that has more than one container. These are useful when recording natural groups of information. Take Blood Pressure as an example, we know we need two values to record this:

Systolic and Diastolic pressures

To record this we don't have to use two separate items, one for each pressure, we can simply use an Aggregate Item.

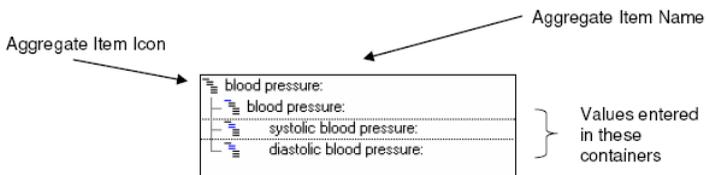


Fig.9 HCR (Part) with Antenatal Sequence inserted
Right Panel of HCR showing an Aggregate Item: Blood Pressure

The Aggregate Item Selector



In a manner similar to the Item and the Sequence encountered earlier, the Aggregate Item also has a selector. By clicking on its icon (illustrated opposite) the selector window will be displayed:

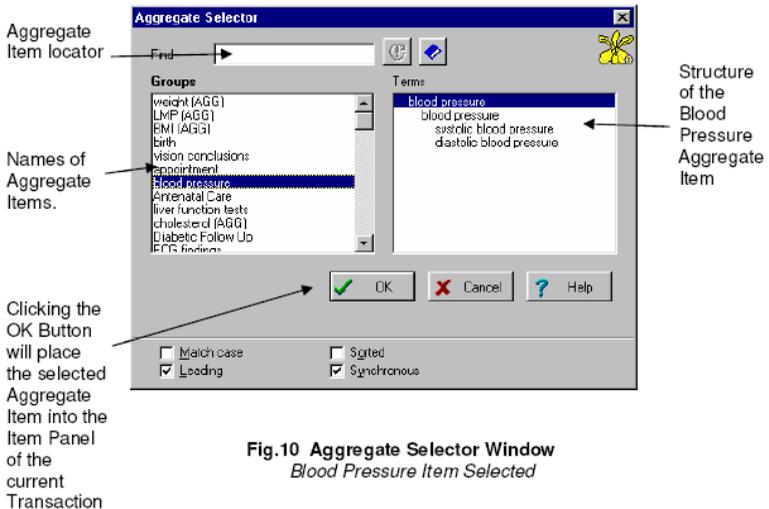


Fig.10 Aggregate Selector Window
Blood Pressure Item Selected

To Summarise:

The basic building block for HEALTHone™ is the Health Care Record. This can be considered as the equivalent of the patient's folder in the manual filing system.

The Health Care Record is divided into 2 Chapters:

The Administrative Chapter
The Medical Chapter

Transactions (pages) are created in these Chapters.

The transaction in the Administrative Chapter contains the basic patient information needed to create the Health Care Record:

Patients First Name
Patients Surname
Patients Sex
Patients Date of Birth

as well as additional administration information such as occupation, name of spouse, GMS number etc.

The first transaction in the Medical Chapter contains the patient's basic medical information, like: Medical History, Surgical History, Allergies, Blood Group etc.

Transactions two onward in the Medical Chapter each record a contact with the patient. This contact can be for any reason, not simply a visit to the surgery.

The Transaction is just a term used by HEALTHone™ to mean 'page'. Whenever a new page has to be inserted into the HCR we instruct HEALTHone™ to create a New Transaction.

Transactions contain Items.

An Item can be considered as a container or box. Each type of Item has its own unique name followed by a colon (:). We place information into Items. For example, the **Date of Birth:** Item will contain a date.

A Sequence is a predetermined set of Items, grouped together to suit a specific task. There is no fixed number of Items grouped together in a Sequence, as many or few as are required to suit the task.

An Aggregate Item is an item that will hold more than one piece of information. An example is Blood Pressure where both systolic and diastolic pressures need to be recorded.

These then are the basic structural points around which HEALTHone™ has been designed. In the sessions that follow all of these points will be repeated.

Own Notes

HEALTHone™

Getting Around

Getting Around

Session One introduced the Health Care Record and terminology used in HEALTHone™.

In this session we will introduce you to one of our patients: John Test, and learn the techniques and methods required to use HEALTHone™ and find your way around the program.

Starting The Program

1) Look on your desktop; can you see a yellow icon like this?



If you can, double click it to start HEALTHone™ and go directly to LOGIN below, otherwise follow steps 2) to 5) :

- 2) On the taskbar click once on the **START BUTTON**
 - 3) Point to Programs
 - 4) Point to the HEALTHone™ folder
 - 5) Click on the HEALTHone™ **for Windows** menu option
- HEALTHone™ starts and the Login Window appears

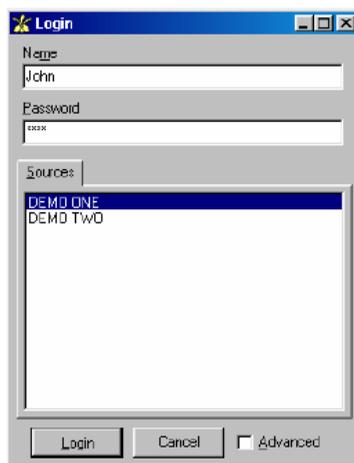
Login

HEALTHone™ has a built in security system that requires 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.

If your practice has more than one source click on the one you wish to open.

Usually you would type your name in the **Name** box, for now just type **John**

Click on the **Password** box and type your code. In our example type: **1111**



Note: *HEALTHone*™ is case sensitive when letters are used in a password.

See the Specific Tasks subjects in the Practice Management Section to find out how to change your password.

Click on the **Login** button.

If the Name and Password you entered were correct *HEALTHone*™ allows access and the Patient Selector Window appears next.

Login ..continued



Unsuccessful Login

If either the name or password you entered were incorrect the message **Invalid Login Name** or **Invalid Password** (whichever is relevant) will appear. Correct the error and click the Login Button again.

Note: After three unsuccessful login attempts **HEALTHone™** will automatically close and you will need to go back and repeat the ***Starting the Program*** exercise on the previous page.

The Patient Selector Window

Selecting a particular patient Health Care Record (HCR) is easy in HEALTHone™. The Patient Selector Window has dynamic filters that immediately reduce the patient list to only those that match the filter.

HEALTHone™ is initially configured to filter by **Surname**, **First Name**, **Date of Birth** or any combination of these, however; additional filters can be added if required (see *Adding Additional Columns* later in this session)

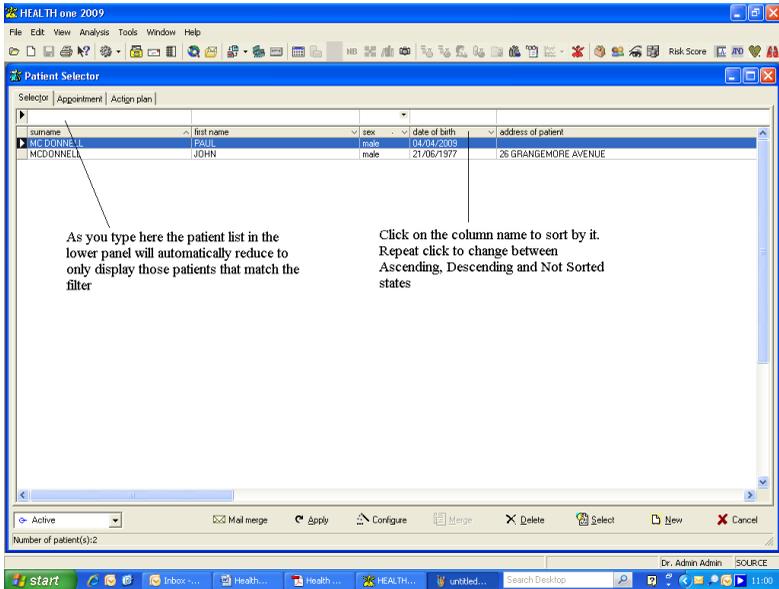


Fig. 2.1 Patient Selector Window

Sorting the Patient List

Each column of information in the patient selector can be used as the basis for sorting the patient list. Clicking on a column name will cause HEALTHone™ to sort on its content.

Each column can have one of three states – marked by an arrow or its absence.

Not sorted	<input type="text" value="surname"/>
Sorted in ascending order	<input style="text-align: right; border-bottom: none; border-right: none; border-top: none; border-left: none; border: none;" type="text" value="surname"/> ^
Sorted in descending order	<input style="text-align: right; border-bottom: none; border-right: none; border-top: none; border-left: none; border: none;" type="text" value="surname"/> v



HEALTHone™ initially only allows sorting by one column at a time, however, you can sort by multiple columns by clicking on the **Configure** icon at the bottom of the patient selector window and selecting the **Options** tab. Now select the **Sort on several columns** option by clicking on its radio button. Click **Validate** to close the Configure Window.

- 1) Experiment by clicking on the Surname column heading

If initially unsorted the patient list now sorts into ascending surname order

- 2) Repeat click on the Surname column heading

Patient list sorts into descending Surname order

- 3) Repeat click on the Surname column heading

Patient list returns to unsorted state.

Adding Additional Columns

Adding Additional Columns

HEALTHone[™] has a variety of information columns which can be displayed in the patient selector window, such as patient address, telephone number etc. It is also useful to see the patients GMS number. Additional columns are displayed by adding them to the patient selector.

As soon as a column is added it can be used both as a filter (by typing in the box above the column name) and a means of sorting the patient list.

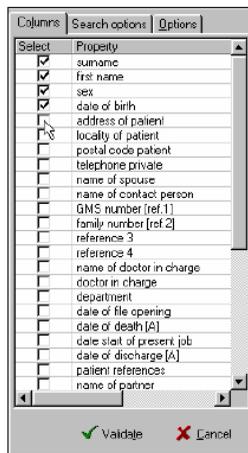
Click on **Configure** button at the bottom of the Patient Selector Window

Click on the select box opposite the **address of patient** to place a in tick it.

Do the same for the **GMS number**

Click on the **Validate** button to close the Configure Window.

- Patient Selector window now has two additional columns



Adjusting Column Widths

There should now be two additional columns of patient information – however; these are not spaced correctly. Some columns are too wide for the information they display and others are too narrow. The width of each column can be altered by dragging the adjuster bar to the left of its heading.

Column Adjuster Bars Adjuster Icon

surname	first name	sex	date of birth
YOUNG	DONAL	male	20/03/88
TEST	AGED 3	male	25/02/96
TEST	JOHN	male	11/05/12

 When you place the mouse cursor on an adjuster bar it will change shape to the Adjuster Cursor. Now drag left to reduce the column width or right to increase it.



- 1) Experiment with adjusting column widths to achieve the approx. appearance as illustrated below.

surname	first name	sex	date of birth	address of patient	GMS number (ref. 1)
YOUNG	DONAL	male	20/03/88	14 LOWER MOUNT STREET	PP
TEST	AGED 3	male	25/02/96	HILL VIEW	PP
TEST	JOHN	male	11/05/12	FOREST VIEW	7776899A
TEST	MARGARET	female	09/06/60	44 MARSON CT	454460C

Selecting an Existing Patient

- 1) If the Surname filter is not currently selected (insert cursor flashing) click once in the white box above the column name.
Surname filter is now selected
- 2) Type a **T**
The list of patients reduces to display only those whose surname begins with 'T'
- 3) Type an **e**
The list of patients further reduces to display only those whose surname begins with 'Te'
Select **John Test** in the patient list.
Click on the **Select** button.
The Health Care Record (HCR) for John Test opens.



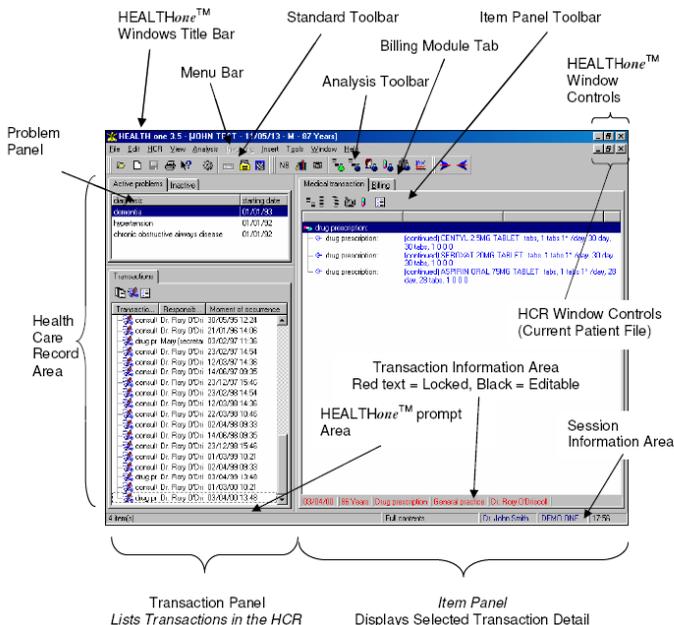
APPOINTMENTS

You may have noticed in fig. 2.1 the **Appointments** tab. This is where you access the appointments module. See the Appointments chapter later in this book to find out how to use it

The HEALTHone™ Screen

This is the HEALTHone™ screen when a patient's HCR is open. The three panels mentioned in session one, problem, transaction and item, can be clearly identified.

Major Areas of the Screen



The HEALTHOne™ Screen - Screen Panels

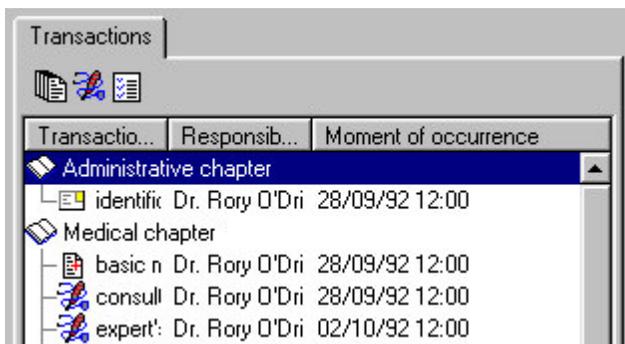
The HCR screen is divided into three separate panels: Transaction, Item and Problem.

Each of these displays a specific part of the patient's file (HCR) as described below.

The Transaction Panel

The Transaction Panel is used to display each event that has been recorded. A new transaction is added to the Health Care Record for any reason not simply because a patient visited for a consultation, i.e. to record an experts report, a lab result, a visit at home, an issue of a repeat prescription etc. Transactions in this panel are divided into the two chapters: Administrative and Medical.

We will look at quick ways to navigate through the various transactions in this panel later, for now:



- 1) Using your mouse, click once to select any transaction in the Transaction Panel. The transaction becomes blue when selected.
- 2) Now use the up arrow and down arrow cursor keys on the keyboard to move from one transaction to another. The highlight moves between transactions. Notice the information in the Item Panel changes

to reflect the contents of the current transaction.

3) Now repeat press the up arrow until the Administrative Chapter comes into view. You can now see that the Administrative Chapter has just one transaction and the Medical Chapter starts with the Basic Medical Information transaction.

The Item Panel

The Item Panel is used to display the contents of the selected transaction. Each transaction can contain one or more items. Remember the discussion on this in the Introduction section.

Note: By default when you open a patient's record, the last transaction displays. It is possible to set it to open automatically in either the Administrative or Basic Medical Information transaction if preferred. To do this click on the menu item « tools – options » and choose from the drop down list «Open the HCR on».

The Problem Panel

The Problem Panel is used to display the patient's principal active or inactive medical problems. This feature can also extend to linking the relevant transactions to the condition they relate too. We will show you how this is done later. It is possible to hide this panel if you are not using it:

Click on the **View** menu and select the option Problems
Problem panel disappears.

Click on the **View** menu and select the option Problems once again.
Problem panel re-appears.

The HEALTHone™ Screen - Using Menus

HEALTHone™ menus act exactly like any other Windows application, simply click, point, click.

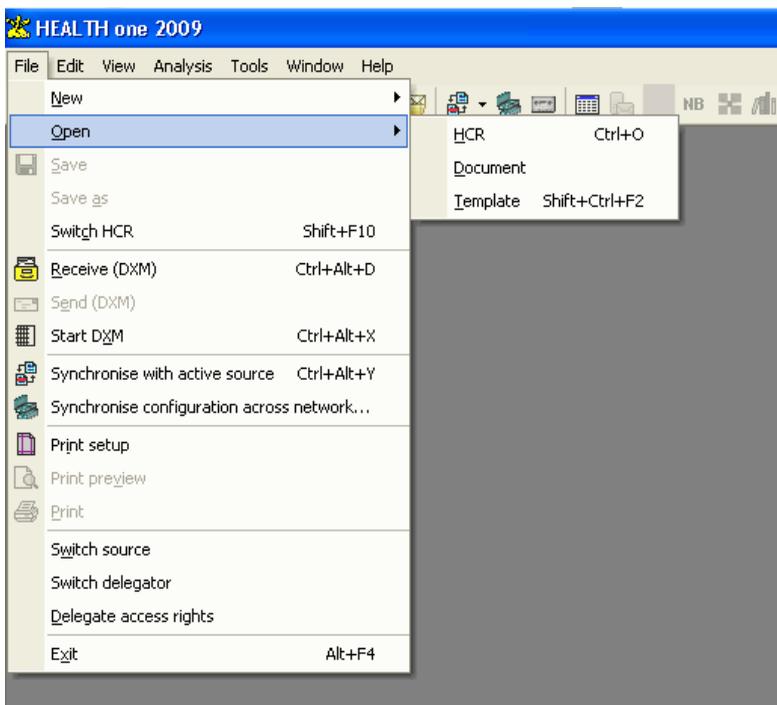


Figure 2.2

- 1) Click once on the **File** menu at the top of the screen
- 2) Move the mouse to point to **Open**
 - Sub menu appears
- 3) Move the mouse to point to **HCR**
- 4) Search for John Test then click on a patient to select.

The first transaction in John Test's HCR is selected in the Transaction Panel and his administration information appears in the Item Panel.

Menu States

Menus and their various options are dynamic in that they have two states, active or inactive. A menu will become inactive, and therefore un-selectable, if the task they perform is not relevant to what you are currently doing.

Inactive menu options appear light grey in colour and active menu options appear black.

In some instances the menu will not be present at all. The HCR menu, for example, will not be present on the menu bar unless a patient's HCR is open.

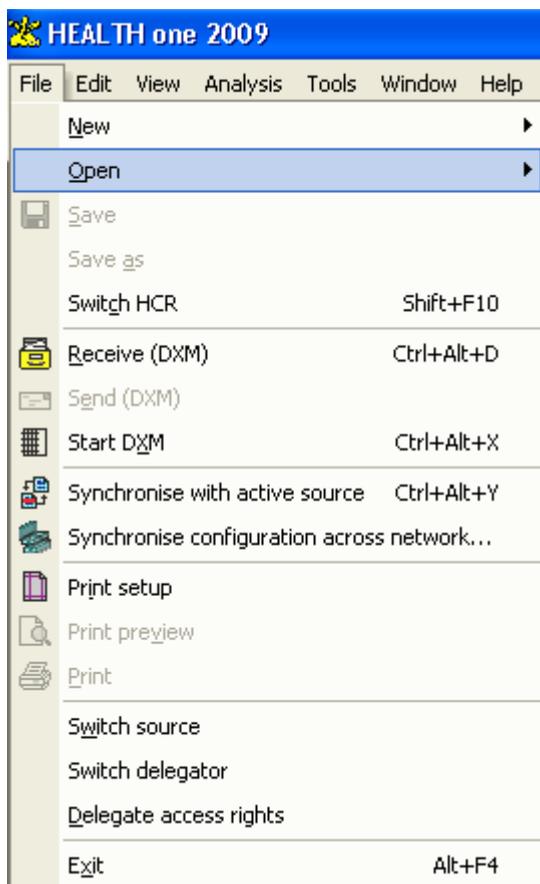


Figure 2.3 Selecting a menu option

Short Cuts



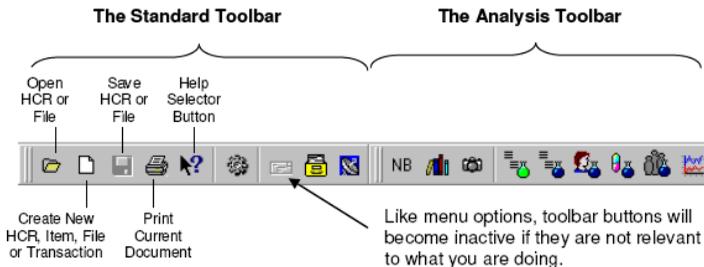
Short Cuts

You may have noticed in **fig. 2.3** the notation next to some of the menu options. Ctrl+ means hold down the Control key and keep it held down while pressing the key following it in the notation. For example, to get to the beginning of the HCR the short cut is **Ctrl+Home**. This means keep the **Control** key held down while pressing the **Home** key. In time you will remember many of these and find them quicker to use than the menus.

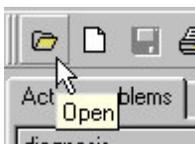
Ctrl+Home
Ctrl+End
Ctrl+PgUp
Ctrl+PgDn
Ctrl+Up
Ctrl+Down

The HEALTHone™ Screen - Toolbars

A toolbar is a strip of buttons and possibly other objects that achieve various tasks i.e. open the Patient Selector Window; create a new patient file etc. etc. The HEALTHone™ Window has two toolbars: Standard and Analysis.



To find out what a particular button does you simply place the mouse cursor on it and an explanation of its function appears in the prompt area at the bottom of the HEALTH^{One}™ Window. Wait a few seconds and its name will appear underneath your mouse cursor.



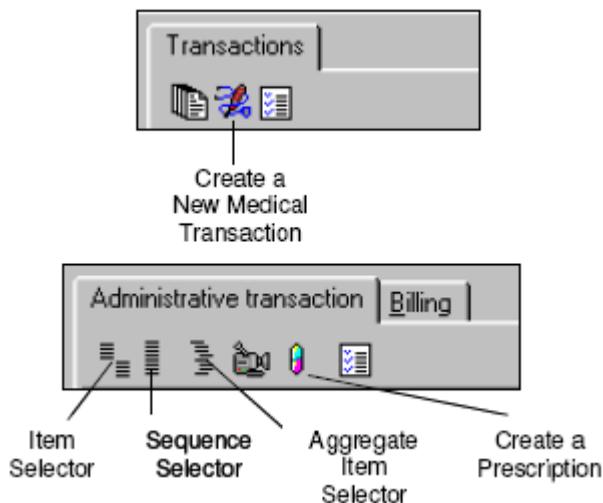
1) Point your mouse at different buttons on the toolbars and observe the prompt area at the bottom of the screen.

Prompt area text describes button functions.

Note:The toolbars can be locked by default – so they can't be dragged into awkward positions. . To do this click on the menu item « tools – options » and tick «Lock the toolbars».

The Transaction and Item panels also have own toolbars:

Transaction Panel Tool Bar



Item Panel Tool Bar

We have indicated the function of some of the more commonly used buttons, however, the prompt area at the bottom of the screen will display a description of each button when you point to it with the mouse and they are also described on the reference sheet.

The Item, Sequence and Aggregate Selector buttons were mentioned in the Introduction Session and this is where they are displayed on your screen. The function of each button will be explained as they are encountered in the book. In many instances the action of a button is also available as an option on a menu, you can choose whatever method you prefer to select a particular function.

The Health Care Record Window

Navigating the Transaction Panel

Using Menus

- 1) Click once on the **HCR** menu at the top of the screen
- 2) Move the mouse to point to **Go to**
 - Sub menu appears
- 3) Move the mouse to point to **End HCR**
- 4) Click once to select.
 - John Test's last transaction is selected.
- 5) Repeat Steps 1) – 4) and select other menu options. Observe the effect of each menu option.
- 6) Repeat steps 1) – 4) this time selecting **Begin HCR**.

Scrolling

A scroll bar will appear to the right of the Transaction Panel if it is not possible to display all of the patient's transactions at one time. John Test's file is a good example. He has a long medical history and has had many contacts with his doctor.

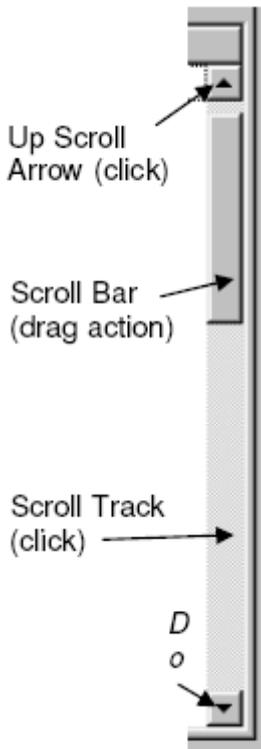
HEALTHone™ scroll bars act exactly like any other Window's application. You have three sets of controls:

Arrows Up/Down: Scroll display by one transaction up or down.

Scroll Bar: Displays information relative to its position on the scroll track. Top, equals the beginning of the patients HCR, Bottom, the end of the patient's file, etc. This is dragged to its new location.

Scroll Track: The quantity of information that can be displayed in the Transaction Panel is moved each time the track is clicked.

Clicking the track beneath the Scroll bar will scroll downwards and above the Scroll Bar will scroll upwards.



The Health Care Record Window

Scroll Bars..ctnd

Practical Exercise:

- 1) Select the menu **HCR/Go to** and select **Begin HCR**.
– As you can see, the Administrative Chapter icon is not visible in the Transaction panel. To display this:
- 2) Click once on the **Up Scroll Arrow**.
– Administrative Chapter Icon comes into view
- 3) Experiment with the various scroll bar controls
- 4) Repeatedly click on the **Up Scroll Arrow** until the Administrative Chapter Icon is once again visible,

Transaction Panel Filter

Transactions are listed in the Transaction Panel in chronological order. However, HEALTHone™ has a special filter function that quickly locates transactions of a particular type for you. This is handy if, for example, you wish to view just lab results, or expert's reports or transactions relating to a particular problem. To activate the filter you click once with the **Right** mouse key anywhere in the Transaction Panel. A menu appears and you select the **Filters** option, then the required type of filter, i.e. Lab Result. Selecting full contents will return to normal chronological view of all transactions.

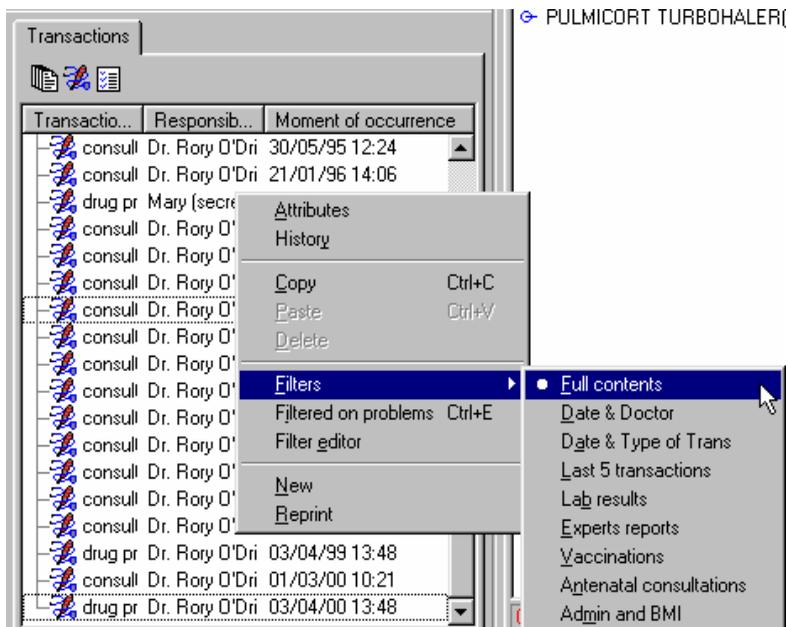


Fig. 2.4 Transaction Filter Menu (right click mouse in panel to display)

- 1) **Right** mouse click anywhere in the Transaction Panel.
 - Menu Appears
- 2) Select the **Filters** option in the menu. Select **Lab Results**
 - Just Lab Result type transactions are displayed
- 3) Repeat steps 1) and 2) and experiment with different selections of the Transaction panel filter.
- 4) Set back to **Full contents**

Filtering Transactions by Problem

Filtering Transactions by Problem

HEALTHone™ can be set to only display the transactions that relate to a particular problem (listed in the Problem Panel).

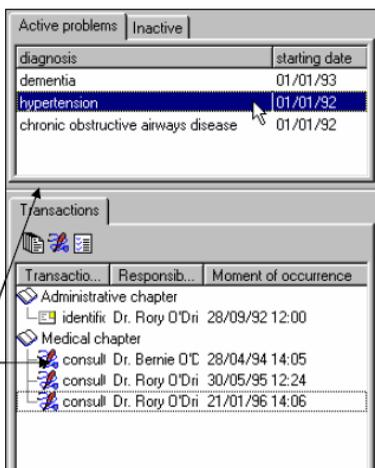
The technique is similar to the filter method just discussed however, after **Right** clicking the mouse in the Transaction Panel you select **Filtered on problems** see Fig 2.4 instead of *Filters*.

Now click once on the required problem in the Problem Panel.

Transactions displayed are those that relate to the problem.

Exactly how HEALTHone™ achieves this will be discussed later.

To cancel and return to normal view **Right** mouse click again and re-select **Filtered on problems**.



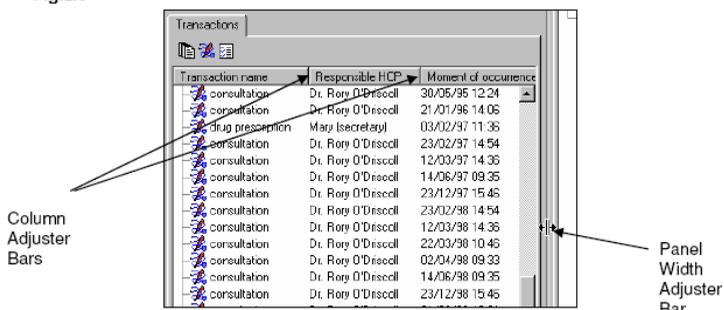
John Test's file has been set up to illustrate this point

- 1) **Right** mouse click anywhere in the Transaction Panel.
 - Menu Appears
- 2) Select the **Filtered on problems** option in the menu.
- 3) Now select a problem in the Problem Panel
 - Only those transactions that relate to the problem are displayed
- 4) Repeat step 3) for the other problems
- 5) **Right** mouse click anywhere in the Transaction Panel.
 - Menu Appears
- 6) Select the **Filtered on problems** option in the menu.
 - Display returns to all transactions.

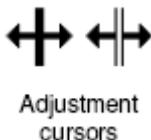
Adjusting the Display of the Transaction Panel

Adjusting the Display of the Transaction Panel

Fig.2.5



Adjusting Display Width



This is identical to the technique encountered earlier to adjust the Patient Selector window. When you point your mouse at the adjuster bars the cursor will change from an arrow to one of the adjustment cursors, dependent upon which bar you are pointing at. When either of these cursors are displayed you hold down the mouse key and drag to adjust the display width, when the new desired width is reached you release the mouse key.

- 1) Experiment with dragging the Panel Width Adjuster Bar.
 - – The width of the Transaction Panel varies
- 2) Drag the Column Adjuster Bars to display all the information available for each transaction.

Transaction Properties

Whenever a new transaction is created its properties box appears. This is where you can assign a person to be responsible for it and link it to a problem if you wish – amongst other things. It is automatically assigned the current date and time, the rest you complete yourself. More in the next session.

Transaction properties ? X

Institution: Greenpark Medical Centre

Type: Contact

Name: consultation

Responsible: Dr. John Smith

Date of event: 31/10/00 11:12:43

Speciality: general practice

Legal structure: Physician/GENERAL PRACTICE

Problem: No problem

Access rights:

Export protected

Display protected

OK Cancel Help

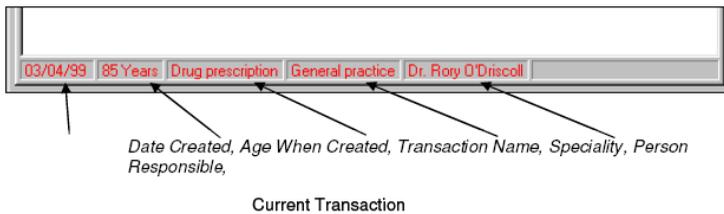
The Health Care Record Window

The Transaction Information Area

The principal information regarding a transaction is displayed at the bottom of the Item Panel in the Transaction Information Area. See Fig 2.2 in this section. This information is dynamic in that it changes according to which transaction is currently selected. When information in this area is in RED it means you do not have the authority to change it –

When displayed in BLACK you do.

Fig. 2.6 Item Panel (Part)
Transaction Information Area Displayed.



Viewing Transaction Attributes



Attribute Button

All the information relating to a transaction – including all its properties mentioned above, form the transaction's *attributes*. These can be viewed in full in the Transaction Properties dialogue box. This box, like the transaction properties bar, only displays the information of the currently selected transaction. For the time being, only concern yourself with the techniques of using HEALTHone™ and not the detail that is being displayed. To display this box you firstly select the desired transaction and then click once on the Attributes button on the Transaction Panel Toolbar.

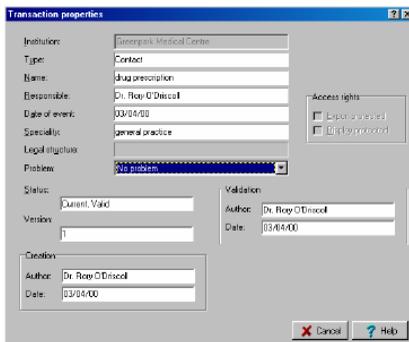


Fig.2.7 Transaction Properties Dialogue Box

- 1) Select any transaction
- 2) Click on the **Attributes Button**

– Selected transaction's attributes displayed in the Transaction Properties dialogue box.

- 3) Click the **Cancel** button to close the dialogue box.

The Health Care Record Window

The Item Panel

As you now know, transactions form the pages in the patient's file. Items are effectively the writing on each page. These are displayed in the Item Panel on your screen. Once again, only the items that belong to the currently selected transaction will be displayed.

Normal Items

In the Introduction session Items were described as being containers and this is evident when you look at some of John Test's transactions:

- 1) Select the *General Practice* transaction that occurred on the 19th of January 1994.
- 2) Observe the item **liver function tests:**. This item *contains* the result **normal**.
- 3) Normally, you can open the container by clicking on it once to select it and pressing the **Return** key. Alternatively you can click on it twice with the mouse. Try it.
 - If you have permission to edit this item it will open – otherwise a warning box appears!
- 4) Click on **OK** to close the Item window or warning box.

Aggregate Items

These are items that have more than one container. To see an example of these :

- 5) Select the **consultation** transaction that occurred on the 23rd of February 1997.
- 6) Observe the aggregate item **blood pressure:**. This item *contains* multiple results, **systolic blood**, **diastolic blood**.

Adjusting the Item Panel Display

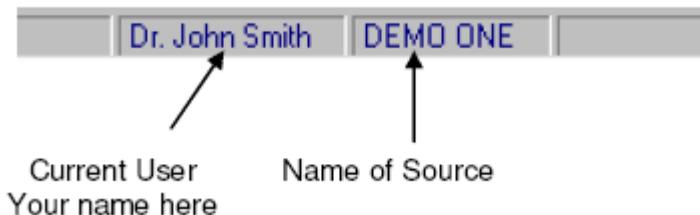
Notice that the Item Panel also has Column Adjuster bars :

- 1) Point your mouse at the item column adjuster bars and drag to re-size.
 - Item information is hidden when the column width is made too small.
- 2) Drag the item column adjuster bars back to approximately where they were.

That concludes our look at the HCR window. Lastly we will look at the last line of the screen. This is part of the HEALTH^{One}™ screen and contains the Prompt Area – you have observed this earlier – and the Session Information Area.

Session Information Area

This area of the screen displays information about the current source reminds you how you logged on :



Closing a Patients File

To close a patient's file you select CLOSE HCR from the File Menu. If you had made any changes that had not been saved HEALTHOne™ would prompt you to do so now.

We have not, or least should not have, made any changes to his file.

Select **CloseHCR** from the File Menu

- John Test's file is closed.



If you had made changes by mistake the following box will now appear.

- 1) Click on the NO button



To close the HEALTHone™ program you simply select Exit from the File Menu.

1) Select **Exit** on the File menu

- Close dialogue box appears.

2) Click on the **Yes** button or simply press the **RETURN** key.

□HEALTHone™ program closes and you are returned to the desktop.

Summary Guide

Start HEALTHone™ Double click this icon on your desktop : or select the menu sequence : **Start / Programs / HEALTHone™/ HEALTHone™ for Windows**

Open the patient selector window Click on the 'open' button on the HEALTHone™Toolbar and select HCR. Note : The patient selector is normally open at all times.

Select a patient in the patient selector window Click once on the filter above the column to be searched to activate it. Type the text to be matched Click twice quickly on the name of the patient in the patient list.

To add/remove a column to/from the patient selector Click once on the **Configure** button at the bottom of the selector window. Click on the column select box required to add/remove the tick mark.

To sort the patient selector window Click on the column heading to be sorted – ascending sort will occur. Click again for descending sort. Click again to cancel sorting.

To adjust the patient selector column widths Place the mouse cursor on the column adjuster bar required and drag to adjust.

To minimise / maximise patient HCR display Use the left most button of the HCR window controls to minimise the display and the centre button to maximise.

To select a menu option Point to the menu required, click once, point to the menu option, click once again

To quickly navigate through transactions in a patients file.
Select any transaction in the Transaction Panel. Now use these short cut keys :

To go to the first Admin page – **Ctrl + Home**

To go to the Last Transaction – **Ctrl + End**

To change chapters **Ctrl + Page Up, Ctrl + Page Down**

To go to the next transaction – **Ctrl + Down Arrow**

To go to the previous transaction – **Ctrl + Up Arrow**

To go to the first transaction in a chapter – **Ctrl + B**

To select which information is displayed in the transaction panel
Right click anywhere in the transaction panel; select the filters option then select the display option required.

To display only those transactions relating to a problem
In the Problem Panel select the problem to be filtered on.
Click anywhere in the Transaction Panel to activate it and press **Ctrl + E**

To adjust the width of the Transaction Panel Drag the panel width adjuster bar.

To view the attributes of a transaction Select the transaction required.
Now click on the transaction Attributes button on the Transaction Panel toolbar.

To close a patients file Select the menu option **File / Close HCR**
To close HEALTHone™ Select the menu option **File / Exit**

Own Notes

HEALTH*One*™



A Patient Visits

Transactions & Items

In this session we apply some of the techniques learnt so far. Our patient, John Test, has visited the surgery complaining of a painful lump on his neck.

We assume that he is the first patient of the day and you have not yet started the **HEALTHone™** program.

Starting the Program and Logging In

Start the **HEALTHone™** program and login.

- **HEALTHone™** opens and the Patient selector window appears.

If you are unsure about starting **HEALTHone™** and logging in refer back to the beginning of the previous session.

Opening John Test's Health Care Record

We practised this in the previous session:

1) If the Surname filter is not currently selected (cursor flashing) click once in the white box above the *Surname* column heading.

- Surname filter is now selected

2) Type **Te**

- The list of patients reduces to display only those whose surname begins with 'Te'

- 3) Select **John Test** in the patient list.
- 4) Click on the **Select** button.
 - The Health Care Record (HCR) for John Test opens.

Creating a New Transaction

To record the visit of John Test we need to add a page to the medical chapter of his HCR. To do this we simply create a new Medical Chapter Transaction. The new transaction will be added to the end of his file.

- 1) Click once on the **Create Medical Transaction** button on the Transaction Panel Toolbar. (See reference sheet).



- The Transaction Properties dialogue box appears – see Fig.3.1

Transaction properties

Institution: Green Park Medical Centre

Type: Contact

Name: consultation

Responsible: Dr. John Smith

Date of event: 25/02/2006 18:05:28

Speciality: general practice

Legal structure: Physician/Green Park Medical Centre

Comment:

Health approach :

Problem:

- alcoholism
- Alzheimer's disease
- chronic obstructive airways disease
- hypertension

Access rights:

- Export protected
- Display protected

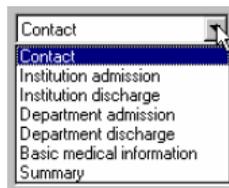
OK Cancel

Fig 3.1 Transaction Properties Dialogue Box

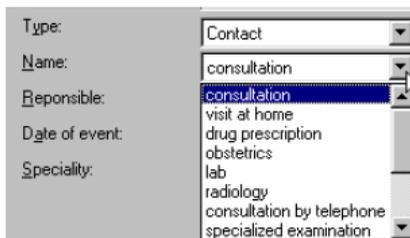
Transaction Attributes

In the previous session we mentioned that each transaction has a set of attributes. Some of those are specified at creation time in the Transaction Properties dialogue box above.

Type: This attribute designates the type of transaction. In General Practice the most common types would be 'Contact' and 'Basic Medical Information'.



Name: Currently this attribute is used only for "Contact" type transactions. It defines the reason for the contact.



Responsible: Specifies the name of the person responsible for creating or maintaining this transaction. This list shows the name of the person logged on and the names of any other people that have delegated their right to create transactions to the logged on user.

Note: There is also an attribute called Author (not displayed on the Transaction Properties dialogue box) which is automatically set to be the name of the person who validates the transaction – see Transaction Status later in this session.

Date of event: Automatically set to the current date and time. Note: You can change this if, for example, you are updating a patient's HCR at a later point in time.

Speciality: This is another drop down list that specifies the medical speciality being recorded. In general practice this is useful when a consultants report pertaining to a speciality is being recorded, or, for example, a patient is being admitted to hospital. In most cases the speciality would be 'General Practice'.

Legal Structure: HEALTHone™ can define a person as performing one or more roles in a practice. If this were the case you would select the current role here. Usually, a person only performs one role, i.e. Physician, and this box can be ignored.

Comment: This new box gives the user additional flexibility in tagging transactions. You can insert any free text you like here. Alternatively you can use an associated list of preferred terms that can be defines using the configuration tool.

Problem: The concept of problems was mentioned in the previous session. This is where a transaction is declared as being related to an existing problem.

The image shows a software interface element. On the left, the text 'Problem:' is displayed. To its right is a dropdown menu box. Inside the dropdown, three items are listed, each preceded by an unchecked checkbox: 'chronic obstructive airways disease', 'dementia', and 'hypertension'.

Note: This can be completed later when the reason for the visit is known.

2) Complete the Transaction Properties dialogue box by observing the lists for the attributes and then setting their values as follows:

Type	Contact
Name	Consultation
Responsible	Your name
Date of event	Current date and time
Speciality	general practice
Legal Structure	Physician/general practice
Problem	None

Shortcut to Creating a New Transaction

It is possible to create new transactions directly from the patient selector. Below is a screen shot of the patient selector:

surname	first name	Patient age	patient cat	GMS number (ref.)	date of birth	address of
BURKE	MARGARET	33		PP	06/04/1957	45 MAIN S
BURKE	SANDRA	24			14/10/1982	14 MAIN S
DALY	PATRICK	3	GMS	782/210D	27/10/2003	LIPPER M
LEAHY	J				26/03/2003	RILDUM M
PELHURSON	M				04/09/2004	THE BELL
TEST	J				12/11/1952	LIPPER S
YOUNG	D				11/05/1933	FOFREST
					20/03/1989	LIPPER C

Once you click on one of the transaction types in the list, a new transaction will immediately be created, with all the default attributes, e.g. the responsible doctor will be the logged on user etc.

Once you click on one of the transaction types in the list, a new transaction will immediately be created, with all the default attributes, e.g. the responsible doctor will be the logged on user etc.

Shortcut to Creating a New Transaction

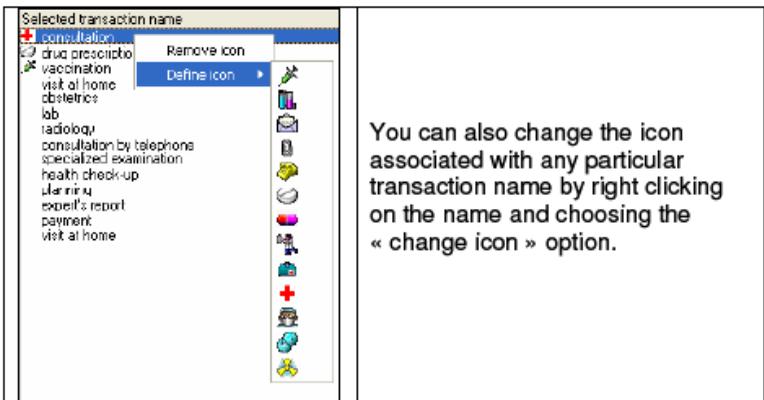
The three consultation types available are the first three transaction names that have been defined in the configuration tool. You can change the consultation types, and the icons associated with each, by opening the configuration tool.

1. Open the config tool
2. Click on file → open → transaction name.
The window below opens up:

The Configuration tool window shows a list of transaction names and their associated icons. The 'Transaction name' column is highlighted, and the 'consultation' type is selected. The 'Selected transaction name' column shows the corresponding icons for each transaction type.

Transaction name	Selected transaction name
consultation	consultation
consultation by appointment	visit at home
consultation by telephone	drug prescriptions
consultant's opinion	Others...

The first three consultation types in the list are those available in the patient selector of **HEALTHone™**. You can move a name on this list up or down by clicking on the name and dragging it to your preferred position in the list.



The Item Selector

HEALTHone™ items are accessed via the Item Selector window –this displays a dictionary of all the items in **HEALTHone™**.

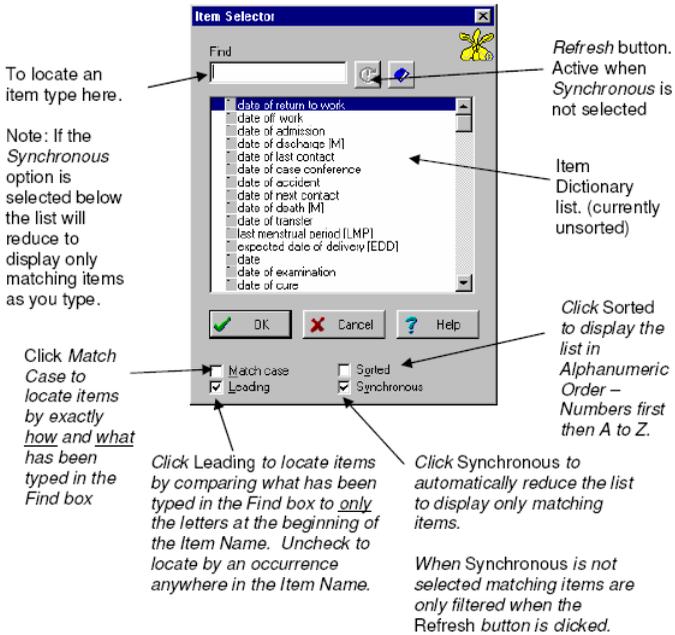
Clicking on the Item Selector Button on the Item Panel Toolbar, illustrated below, will display the selector window (see fig 3.3).



Item selector

Inserting Items

Fig.3.3
Item Selector Window



- 1) Ensure that the newly created transaction is selected in the Transaction Panel and then click once on the Item Selector Button.
 - Item Selector dialogue box appears.
- 2) Click on the **Sorted** option.
 - Tick (called a Check Mark) appears in the Sorted option check box and the list is sorted into alphanumeric order.
- 3) Uncheck the **Sorted** option by clicking on it once again.
- 4) If the **Synchronous** option is unchecked – check it now by clicking on it.
- 5) If the **Leading** option is unchecked –check it now. Type: **as**
 - Only Items that begin with ‘as’ are displayed
- 6) Uncheck the **Leading** option.
 - All Items that contain the letters ‘as’ together anywhere in their name are displayed.
- 7) Delete the **as** in the Find box.
 - Full list of items appears once more
- 8) Uncheck the Synchronous option.
 - Refresh button activates
- 9) Type in capitals: **IC**
 - Nothing happens
- 10) Click once on the Refresh button.
 - All Items that contain the letters ‘IC’ together anywhere in their name are displayed.
- 11) Check the Synchronous option.

- Refresh Button de-activates – screen stays the same because Synchronous is active and filtering on 'IC'.
- 12) Check the Match Case option.
 - Only Items that have upper case (capital) IC anywhere in their name are displayed.
 - 13) Uncheck the **Match Case** option.

Now we will locate the first item needed to record this visit of John Test. Firstly, set the Item Selector options as follows:

Match Case	= Unchecked.
Leading	= Checked
Sorted	= Unchecked
Synchronous	= Checked.

We need to locate the Item: *subjective symptoms*

- 1) Delete the **IC** in the Find box and type su
 - All items beginning with 'su' are now displayed.
- 2) The Item subjective symptoms should already be selected, if not, select it now by clicking on it once.
- 3) Click on the **OK** button
 - The Item Selector box closes and the Item 'subjective symptoms' is added to the transaction detail panel and its associated list appears.

We will look at the Associated List in more detail later. To continue:

- 4) Click once on the Associated List **Close** button.
 - Associated List box closes and Subjective Symptoms dialogue box is active.

Showing/Hiding the Item Attributes Panel

1) To show or hide the Item Attributes panel click on the illustrated button once. Click again to close.

The Item box should now appear as in Fig.3.4

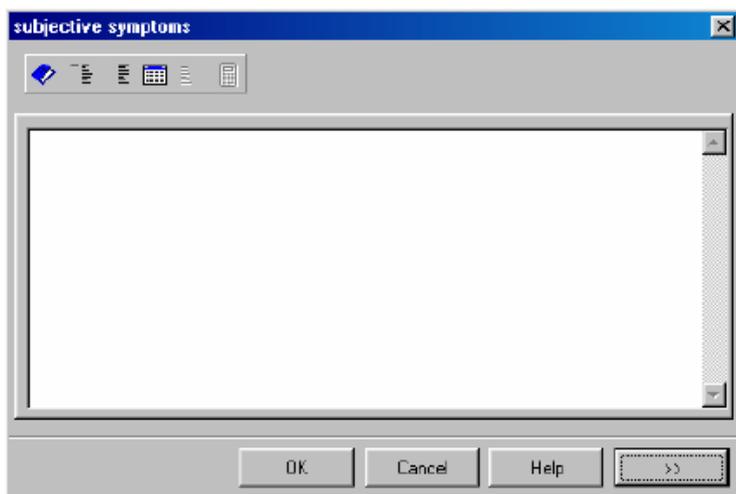


Fig.3.4 The Subjective Symptoms Dialogue Box

Typing and Editing Text

Typing and editing follows the usual text editing techniques:

- 1) Type the following: **This is a line of text typed by** your *name*
- 2) Press the Backspace key repeatedly to delete your name and the text 'typed by'
 - Text now reads 'This is a line of text'
- 3) Use the Left Cursor key to move the flashing insert cursor to before the I of line. Type: *new*
 - Text now reads 'This is a new line of text'
- 4) Drag across the words *a new* to select them and type: *an old*
 - Text now reads 'This is an old line of text.'
- 5) Drag and select the entire line of text. Press the Backspace key.
 - Text deleted.

The Item Dialogue Box

Term Lists

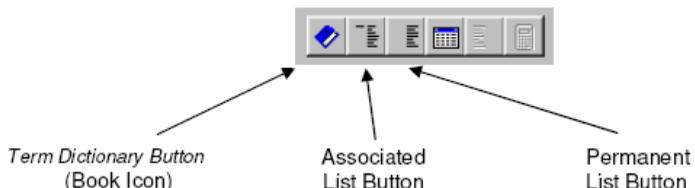
HEALTHone™ is designed to keep the amount of typing necessary to maintain a patient's record to a minimum. This is achieved by selecting *terms* from various sources and supplementing these with typing if necessary. The three most common sources of terms are:

The Term Dictionary A complete list of terms known to HEALTHone™

The Associated List A list of terms related to the current Item.

The Permanent List A list not related to a specific item that expresses degree, intensity, size etc as opposed to a particular complaint.

To display a list you click on its illustrated button on the Item dialogue box toolbar.



There are a number of good reasons to use lists as opposed to typing:

- Firstly It saves you time because it is quicker to choose a response from a list than type it yourself.
- Secondly It's easier, there is no need to remember the spelling of complicated medical terminology.
- Thirdly It is more consistent, you are more likely to express a condition in a similar manner using terms from a list as opposed to typing a response. This can become very important when analysing your patients later and locating occurrences of a particular illness or condition.

Using the lists takes a little effort at the beginning but very quickly becomes far more efficient than typing. In short, we encourage you to use the lists wherever possible.

The Term Dictionary

OK, now to continue with John Test:

- 1) Click once on the Term Dictionary Button
 - Term Selector Window appears
- 2) Ensure that only the Leading and Synchronous options are checked.
- 3) Type: nec
 - List reduces to only terms beginning with 'nec'
- 4) Select the term: neck pain
- 5) Click on the OK button.
 - 'Neck pain' inserted as a response and the selector window closes.

The Permanent List

John Test describes the pain as acute. To record this we use the Permanent List:

- 1) Click once on the Permanent List Button.
 - Permanent List appears.
- 2) Select the term: acute, press the RETURN key
 - Acute sub-list appears
- 3) Ensure that acute is still selected and click on the Insert button.
 - Item response now reads 'neck pain acute'

Selecting / Deleting a Term

A term selected from one of the lists is treated by HEALTHOne™ as a complete unit, i.e. the term **acute** can only be deleted entirely not as individual letters **a c u t e**.

- 1) Press the Backspace key until the term acute is deleted
 - The ENTIRE term 'acute' is deleted.
- 2) Click once anywhere in the neck pain
 - The entire phrase 'neck pain' becomes highlighted to indicate that it is selected

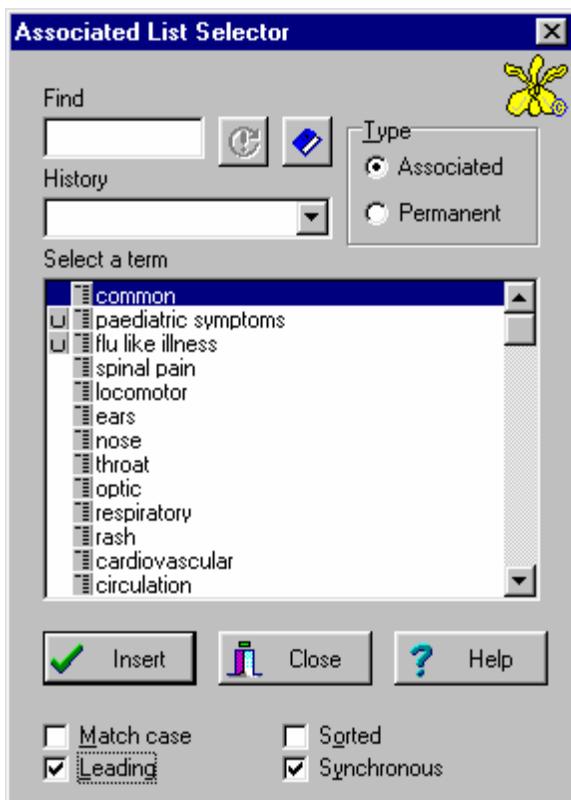
To cancel a selection:

- 3) Press the Right Cursor key to move the Insert Cursor away from the selected term.
 - 'neck pain' is no longer selected.

Associated Lists

Many Items have a list of common terms associated with them which is displayed in the Associated List Selector dialogue box.

- 1) Click once on the Associated List Button.
 - Associated List dialogue box appears.



List Options

These are identical in meaning to the Item Selector dialogue box and the only new objects are the List Type selector and History Box. The list type selector provides an alternative way to display the Permanent List we used a moment ago.

Associated Lists

The History Option Box

To use the History box you need to understand how the list is structured.

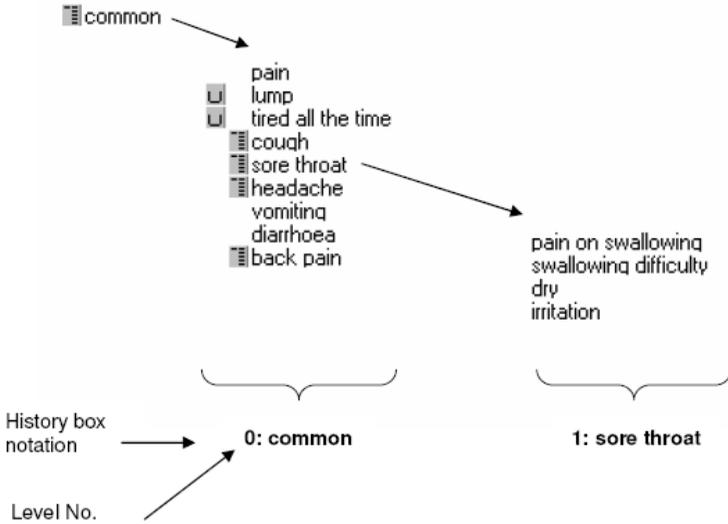
List Structure



Icon used
to indicate
that a term
has a list of
its own

This particular item, **subjective symptoms**, has terms associated with it which themselves have a list associated with them. You will know when a term has a list of its own because the icon illustrated will appear to the left of it.

As an example, take the term 'common' and the further selection of one its terms 'sore throat'.



The History Box notation displays the name and level of the current list being viewed. The more sub-lists you select the higher the level number will become. In addition the History Box can be used to move easily to a different level by clicking on the down arrow to its right and selecting the level required.



Navigating the List:

1) Click once on the term: common to select it and then press the Right Cursor Key once.

- Sub-List for 'common' term appears and History Box displays '0:common'

2) Use the Down Cursor key to select the term sore throat, now press the Right Cursor key once again.

- Sub-List for 'sore throat' term appears and History Box displays '1:sore throat'

3) Press the Left Cursor key once to return to the list 0:common.

Associated Lists

4) Press the Left Cursor key again to return to the full list of associated terms.

5) Spend a little time experimenting with the Up, Down, Left and Right cursor keys to see their effect.

6) Click once on the Close button

- Associated List dialogue box closes

7) Click once again on the Associated List Button to re-open the dialogue box.

Using a Term as a Response

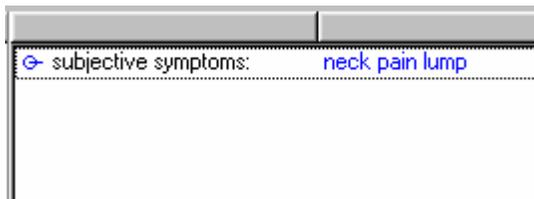
The cursor keys are used to navigate the various terms and lists, however, to use a term as a response simply select it press the RETURN key. If the term has a sub-list this will be displayed as well as the selected term being placed into the Item dialogue box. If the selected term does not have a sub-list pressing the RETURN key will use the term as a response and the Associated List dialogue box will automatically close.

- 1) Ensure that the term common is still selected, press the Right Cursor Key once to display the sub list.
- 2) Use the Down Cursor key to select the term lump, and press the Return key.

- The Item dialogue box now reads 'neck pain lump' and the associated list box has closed.

- 3) Click the OK Button.

Item dialogue box closes and the Transaction Detail Panel appears as shown:



Note : If you do not wish to use Associated lists it is possible to disable them. To do this click on the menu item « tools – options ». They can be restored at any time.

Automatic Item Selector Display

The Subjective Symptom Item is now complete. Next, we will record the Objective Findings.

To place another Item into this transaction for John Test we would normally click on the Item Selector Button on the Item Panel Toolbar, however, HEALTHone™ will automatically assume you are searching for an item as soon as you type! It will also display the dialogue box with the list filtered on what was typed.

- 1) Type an: o

The Item Selector dialogue box appears with the items beginning with 'o' already displayed.

When you are familiar with HEALTHone™ you will realise that this is an advantage because it saves you time, however, at first it can be confusing.

- 2) Click once on the Cancel button. The Item Selector dialogue box closes.

More Items

Inserting the Objective Findings Item

- 1) Click once on the **Item Selector Button** on the Item Panel Toolbar.
- 2) Type: ob in the Find Box
 - Item list reduces to those beginning with 'ob'
- 3) Ensure that the Item objective findings is selected and click once on the OK button.
 - The Item 'objective findings' is placed into the transaction detail panel and its associated list box opens automatically.

The term we require is not in the Associated List but in the Term Dictionary:

4) Click on the Close button to close the Associated List dialogue box. (or press 'Esc').

5) Click once on the Term Dictionary Button.

- Term dictionary now appears

6) Type: **seb** in the Find box and select the term **sebaceous cyst**, click on **OK**

- Term 'sebaceous cyst' entered as a response and the dictionary closes.

-

We will now supplement this term with additional text:

7) Type: **2 x 2 cm**

- Response now reads 'sebaceous cyst 2 x 2 cm'

8) Click on the **OK** Button to complete this Item.

- Transaction detail Panel now has two items entered.



Inserting the Assessment Item

1) Click once on the Item Selector Button on the Item Panel Toolbar.

2) Type: **as** in the Find Box

- Item list reduces to those beginning with 'as'

3) Ensure that the Item **assessment** is selected and click once on the OK button.

- The Item 'assessment' is placed into the transaction detail.

The Assessment Item does not have an associated list.

4) Use the Item Dictionary to enter the term **sebaceous cyst** as a response.

5) Type: **back of**

6) Use the Item Dictionary to enter the term **neck** as a response.

- Response now reads 'sebaceous cyst back of neck'

7) Click once on the OK button.

More Items

The Assessment Item is now completed and your screen should appear as in Fig.3.5 below:



Fig.3.5 Transaction Detail Panel

Lastly, we will complete this session by inserting the Plan of Action Item:

Inserting the Plan of Action Item

1) Click once on the **Item Selector Button** on the Item Panel Toolbar.

2) Type: **pl** in the Find Box

- Item list reduces to those beginning with 'pl'

- 3) Select the Item **plan of action** and click once on the **OK** button.
 - The Item 'plan of action' is placed into the transaction detail panel and its associated list box opens automatically.

Skipping a Term as a Response

This time we wish to use a term from a sub-list but omit the term the list belongs to:

- 4) In the Find Box type: **pr** . Ensure the term **procedure** is selected and press the **Right Cursor** key once.
 - The sub-list for 'procedure' is displayed but the term is not placed in the Item dialogue as a response.
- 5) In the Find Box type: **ex** , and ensure that the term **excision** is selected. Press the **Return** key.
 - The sub-list term 'excision' appears as a response and the associated list box closes.
- 6) Type: **shelled out successfully** Click on the **OK** button.

Inserting a Repeat Item

Sometimes, for presentation purposes or because there is a great deal of typing required as a response or because there is more than one condition to be recorded, it may be necessary to use more than one item of the same name. You can use as many items of the same name as you require in a transaction. **HEALTHOne™** has a quick procedure to do this; simply select the item to be repeated and type an **=**.

- 1) Ensure that the newly created **plan of action:** item is selected in the transaction detail panel. Press: **= (equals key)**
 - A new 'plan of action' item is created and its associated list appears.
- 2) The first term **follow up** is the one we require. Press the **Return** key.
 - The term 'follow up' is used as a response and its sub list appears.

Inserting a Repeat Item

- 3) Select the term **1 week** in the sub-list and press **Return**.
- 4) Click **OK** to close the plan of action dialogue box.
 - Your completed transaction should now appear as in Fig. 3.6.



subjective symptoms:	neck pain lump
objective findings:	sebaceous cyst 2 x 2 cm
assessment:	sebaceous cyst back of neck
plan of action:	excision shelled out successfully
plan of action:	follow-up 1 week

Fig.3.6 Transaction Detail Panel
Five Items Completed

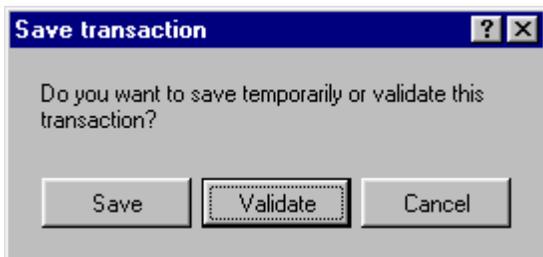
Saving a Patients File

Whenever you have created a new transaction or made changes to a patients file you should save the file. HEALTHone™ transactions can be Saved or Validated or Saved and Validated at the same time.

A Saved transaction is one that has been written to the patients file and will be available the next time the file is opened, however; it will not become part of the HEALTHone™ audit trail until it has been validated.

To save a patients file you select Save from the File Menu.

- 1) Select **Save** from the File Menu - Validation prompt appears.



- 2) Click the **Validate** Button.
- 3) Select **Close HCR** from the File menu.

File closes and the Patient Selector window is once more in view.

Note: By option you can skip the confirmation dialogue when saving a transaction – the transaction will be validated automatically. To do this click on the menu item « tools – options » and tick the option «CTRL+S validates transactions without confirmation». Then press CTRL+S to save and validate when in a patients file.

Closing the HEALTHone™Program

To close the HEALTHone™program you simply select Exit from the File Menu.

- 1) Select **Exit** on the File menu
 - Close dialogue box appears.
- 2) Click on the **Yes** button or simply press the **RETURN** key.
HEALTHone™ program closes and you are returned to the desktop.

Summary Guide

Create a new Medical Transaction

Click on the New Medical Transaction button on the TRANSACTION PANEL Toolbar. Complete the transaction properties box.

Insert a new Item

If you know the name of the item you require simply type its name when the transaction detail panel is active. Otherwise, click on the Item Selector button on the ITEM PANEL Toolbar and select the required item from the list.

Display / Change the attributes of an item.

First ensure that the item is open for editing by selecting it and pressing the RETURN key. Now click on the attributes panel button to display these. Click once again on the same button to hide these.

To display the term dictionary when editing an item.

Click once on the blue book on the item dialogue box toolbar or type **Ctrl + T**

To re-display the associated list when editing an item

If an item has an associated list it will automatically open when the item is opened for editing. To re-display it once closed click once on the associated list button on the item dialogue box toolbar or type **Ctrl + A**

To display the permanent dictionary when editing an item.

Click once on the permanent list button on the item dialogue box toolbar or type **Ctrl + P**

To navigate an associated list

If the term required has no sub list of its own simply press RETURN to include it as a response. If the term has a sub list of its own, you can:

Press **RETURN** – include term and display sub list.

Press right arrow to exclude term and display sub list.

Click on the term with the **Right** mouse key to display a menu. Now click on **SELECT** to include the term without displaying the sub list.

Press left arrow to return to the term from a sub list.

Repeat an Item

Select it and press the equals key.

Save a patients file

Select the menu sequence **File / Save**

Own Notes

HERE – a new patient on
PDF

Creating A New Patient Health Care Record

In this session all the techniques needed to create a file for a new patient will be discussed.

We assume that you have not yet started *HEALTHone*™ for this session, if you have go straight onto *Creating A New Health Care Record* below.

Starting the Program and Logging In

Start the *HEALTHone*™ program and login.

- *HEALTHone*™ opens and the Patient selector window appears.

If you are unsure about starting *HEALTHone*™ and logging in refer back to the beginning of the *Getting Around* session.

Creating a new Health Care Record

This can be done directly from the Patient Selector Window:

1) Click once on the **New** icon at the bottom of the window.



- You are about to create the first transaction in this patient's file, this is always the "Patient Identification" transaction.
- New Patient HCR created and the Patient Identification Items, surname:, first name:, sex: and date of birth: automatically appear in the Item Panel.

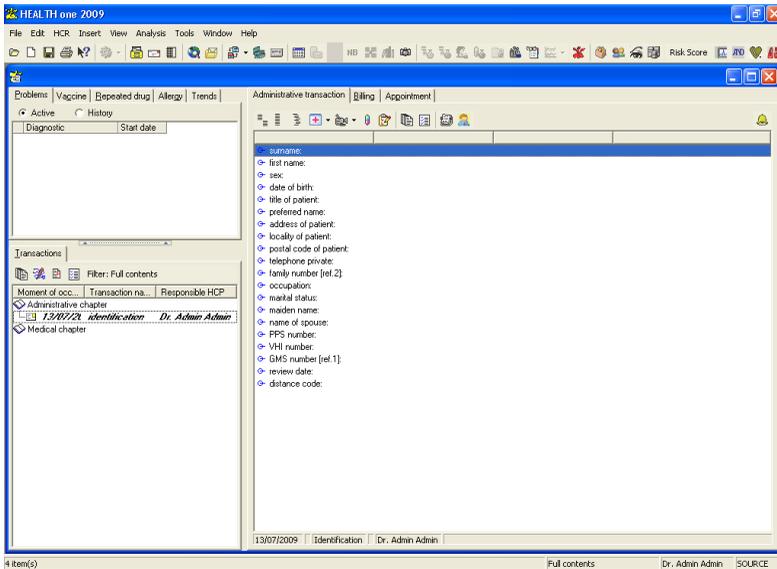


Figure 1

Minimum Administration Items

The patient attributes list appears in the first transaction of the administration section.

The four items **surname**:, **first name**:, **sex**: and **date of birth**: are the minimum needed to create a new patient file.

1. Ensure that the **surname**: item is highlighted. Press the **Return** key.
 - The 'surname:' item opens ready for editing.
2. Type: **Tennant**; Press the **Return** key.
 - The 'surname:' item only requires a single line of text and automatically closes when the RETURN key is pressed.

- The highlight automatically moves on to the next item in the list.
3. Press **Return** to open the **first name:** item. Type: **Sarah**
Press the **Return** key.
 4. Press **Return** again to open the **sex:** item.

Restricted Response List

The possible responses to the **sex:** item are limited. For items like this **HEALTHone™** will often present a list of possible terms. To complete this item, you can:

- Use the cursor keys.
- Type the first letter of the response, i.e. M male or F female
- Click on the down arrow to the right of the response box to display the list and select you answer by clicking on it with the mouse.

Experiment with all of the above techniques. Select the response female. Press **Return** the 'sex:' item closes and highlight moves onto the next item. Press **Return**. Type carefully: **12071972** for the date of birth.

5. Press the **Backspace** key () to delete the **2** of **1972** and type a **0**

Press **Return** to complete the item.

- The minimum items are now completed. See (fig.2)

Date Problem ? See the information box on the next page

Creating a new Health Care Record



Date Format – 2 digits for the year not 4

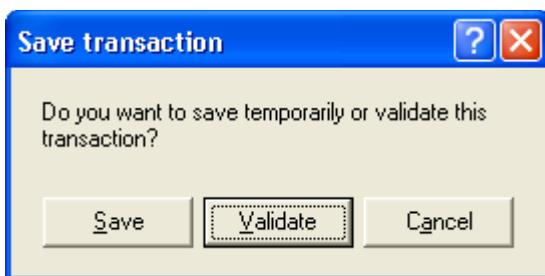
HEALTHone™ obtains its date format from your Windows Regional Settings. If HEALTHone™ only accepts 2 digits for the year select your date settings via **START / Settings / Control Panel / Regional Settings / Date** and change the *Short Date* style as

The screenshot shows a 'Short date' dialog box with the following fields:
Short date sample: 08/11/2000
Short date style: dd/MM/yyyy
Date separator: /

6. Enter in any other attributes required for the patient. They can be entered at a later stage.

Saving the new Health Care Record

- 1) Click on the 'Save' button on the HEALTHone™ Toolbar at the top of the screen,
 - Dialogue box appears:



Select **Save**.

The new patient file has been saved to disk and remains open for further editing if required.

Notice that the HEALTHone™ information Bar now displays Sarah's Name, Date of Birth, Sex and Age.

Closing the Health Care Record

Select **Close HCR** on the File Menu.

- Sarah's file now closes

Exiting HEALTHone™

Select **Exit** on the File Menu. Answer **Yes** when prompted.

- HEALTHone™ closes and the desktop reappears.

Summary Guide

1. Create a new patient HCR in the patient selector window. When the patient selector window is open, click on the **NEW** button.
2. Create a new patient from the main menu. Select the menu sequence: **File / New / HCR** or click on the **NEW** button on the **HEALTHone™** toolbar and select **HCR** or press: **Ctrl + N**
3. Save a patient file. Select menu sequence: **File / Save** or click on the **SAVE** tool on the **HEALTHone™** toolbar or press: **Ctrl + S**
4. To delete an item - Select the item to be deleted and press the **DEL** key. Answer **YES** when prompted.
5. To delete a transaction - If the transaction has not been validated, simply select it and press the **DEL** key. Answer **YES** when prompted. If the transaction has been validated, the technique is the same, except the transaction will be **marked** as deleted and hidden within the transaction list but **NOT** physically removed from the patient's file.
6. To delete a patient's file. Open the patient selector window and select the patient concerned. Now click on the **DELETE** button. Answer **YES** when prompted.

Own Notes

Adding Basic Medical Information

The Basic Medical Information is a transaction that records data such as allergies, past medical and surgical history, etc. It effectively acts like a summary chart in your manual notes. This is usually the first page in the Medical Chapter and has a unique icon to represent it. Illustrated on the left,

Starting the Program

1) Start **HEALTHone**™ Mand Login. *Patient selector window is now open.*

Opening a Health Care Record

To open an existing patients HCR:

- 2) Type: **Te** in the surname filter
- 3) Select **Sarah Tennant** in the patient list.
- 4) Click on the **Select** button.
 - The Health Care Record for Sarah Tennant opens.

Creating a new Basic Information Transaction

We are now going to record the Basic Medical Information in Sarah Tennant's HCR.

Use the icon to quickly create a basic medical transaction



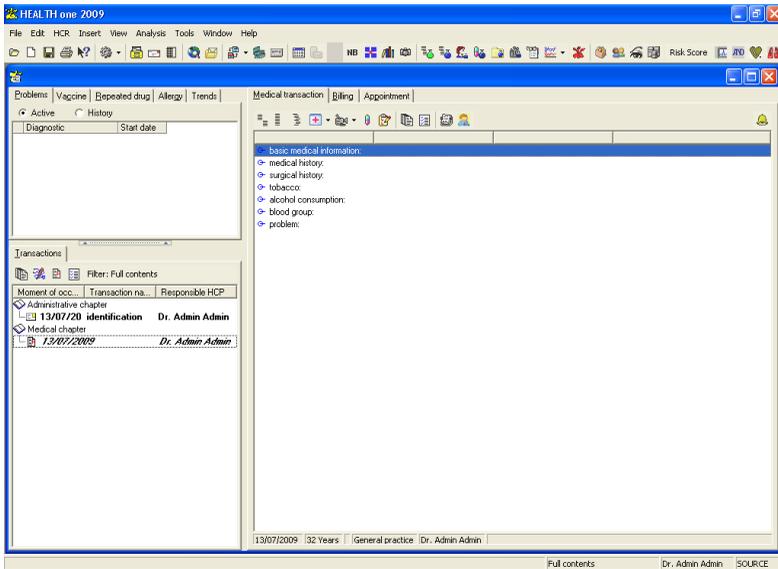


Figure 1.

As you can see from figure 1 above the basic medical information sequence is added, next we select the sequence items we require.

Managing Items

In this instance we are going to skip over the first item because we wish to leave it in the file merely as a descriptive title.

1) Ensure the **basic medical information** Item is selected. Press the **Down Cursor** key once.

- ‘medical history:’ item is now highlighted

2) Press the **Return** key to edit the **medical history:** item. In the associated list **Find** box type: **h**

- only terms beginning with 'h' remain in the list.

Quick Clicks

3) Select the term **hypertension** in the list by clicking on it twice quickly (keep the mouse perfectly still between clicks).

- 'hypertension' added to the medical history item.

4) Click **OK** to close the medical history: item.

Repeating an Item

We wish to record more medical history information for Sarah and to do this another medical history item is required. There is a quick way to do this if an item of the same type already exists in the transaction you are editing. Simply select (not edit) the item which is the same type and press the (=) equals key.

5) The highlight is now on the **surgical history:** item. Press the **Up Cursor** key once to re-select the **medical history:** item (or simply click on it once with your mouse)

- 'medical history:' item now highlighted once more.

6) Press the equals key = once

- A new 'medical history:' item is inserted and opens for editing.

7) Double Click on **pneumonia** in the associated term list.

- 'pneumonia' added as a response for this item.

8) Do not close this item yet

Managing Items

Setting Item Attributes



Each item has a series of settings called attributes, which are in addition to any contents that may have been entered. These perform various functions including how the item and its contents appear on screen, how severe the condition being recorded is – via a gravity index, moment of occurrence, person responsible and various other information. These are displayed by clicking on the button illustrated when the item is open for editing.

1) The medical history item that contains the term **pneumonia** should still be open. If not, open it now for editing and close the associated list box when it appears by clicking on its **Close** button.

- 'pneumonia' text displayed.

2) Click once on the button to display the items attributes.

3) Set the attributes the same way as illustrated in Fig.3:

The screenshot shows a dialog box titled 'Medical History Item Attributes'. It has two tabs: 'Standard' and 'Action plan'. The 'Standard' tab is selected. The dialog contains the following fields and controls:

- Comment:** A text input field.
- Severity Index:** A dropdown menu.
- Responsible:** A dropdown menu showing 'Dr. Admin Admin'.
- Date of event:** A checkbox, a date field '13/07/2009', and a time field '16:43:29'.
- Display mode:** A dropdown menu showing 'Normal display'.
- Start date:** A checkbox and a date field '13/07/2009'.
- End date:** A checkbox and a date field '13/07/2009'.
- Codifications:** A text field containing '...'. There is also a 'Protection' section with 'Display' and 'Printing' checkboxes.
- Buttons:** 'OK', 'Cancel', and '<<' buttons at the bottom.

Fig.3 Medical History Item Attributes

4) When completed click on the **OK** button.

- Item closes and appears in red.

Setting Item Display Mode

You may have noticed in Fig. 3 the *Display Mode* box – which we left on its default setting of *Normal*. Normal display mode shows the Item Name followed by its contents. There are several other ways to display item information – you can select these by either right clicking with your mouse on the item and selecting **Display Mode**, then select the mode required from the menu, or, click once on the item to select it and then use the short cut keys.

Managing Items

Setting Item Display Mode

1) Right Click with the mouse on the **medical history:** item for *pneumonia* just created.

Menu appears

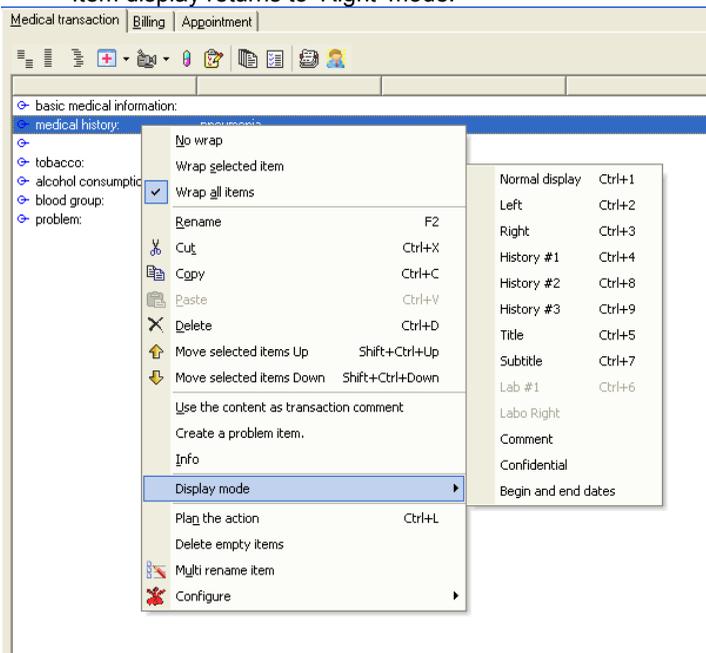
Select the **Display Mode** option – then select the **Right** option from the next menu.

The item contents ‘pneumonia’ stays in view but the item name ‘medical history’ has disappeared.

3) Experiment with other display settings for the same item.

4) Ensure that the item is still selected and press **Ctrl + 3**

- Item display returns to ‘Right’ mode.

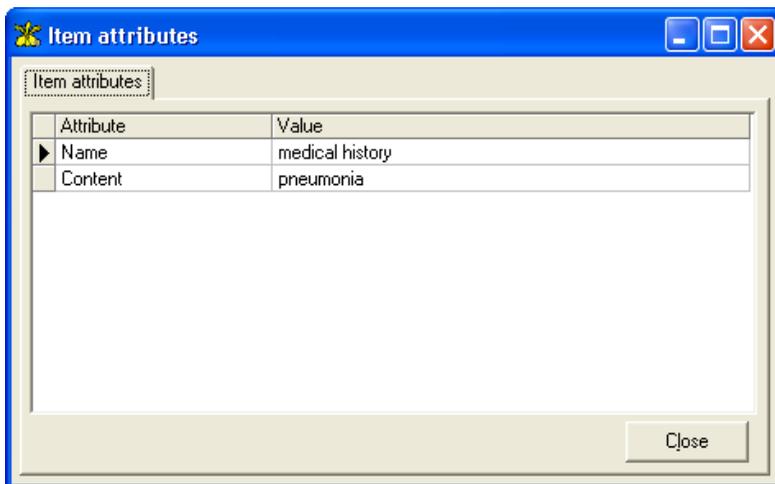


Managing Items

Viewing Item Attributes

You do not need to open an item for editing to view its attributes. This is only necessary if you wish to *change* their settings. To view, simply select the item by clicking on it once with the mouse and then click on the **Attributes** button on the Item Panel Toolbar – illustrated on the left.

- 1) Click once on the **pneumonia** medical history: item to select it. Click once on the Item Panel Toolbar **Attributes** button.
 - Attributes for the selected item appear.



- 2) Close the Attributes window by clicking once on the button.
 - Windows closes

Completing the Basic Medical Information

Surgical History:

- 3) Open the **Surgical history:** item for editing. Select **appendicectomy** from the associated list. Do not close the item yet.
- 4) Set the **Date of Event** attribute to: **01/07/1992**
- 5) Click on **OK** to close the item.

Family History:

- 6) There is a history of Heart Disease in the family. Open the **family history:** item and record this by selecting the appropriate term from the associated list and close the item.

Completing the Basic Medical Information

Tobacco:

- 7) Open the **tobacco:** item for editing. Select **cigarettes** from the associated list. Then type: **20 p/day**.
- 8) Click on **OK** to close the item.

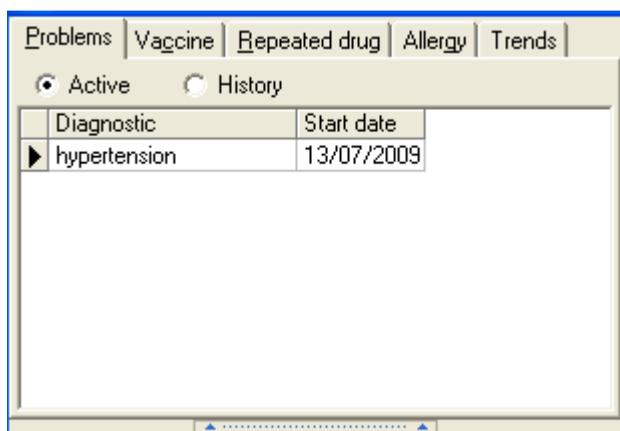
Alcohol Consumption:

- 9) Open the **alcohol consumption:** item for editing. Select **social** from the associated list. Then type: **8 units/week**.
 - 10) Click on **OK** to close the item.
- Blood Group:

- 11) Open the **blood group:** item for editing. Select **A neg** from the associated list.
- 12) Click on **OK** to close the item.

Recording & Displaying a Problem

Sarah has hypertension and it would be nice to see this instantly when the patient file is opened – to facilitate this we use the Problem Panel. HEALTHone™ copies the contents of the item(s) **problem:** and places it into the Active window of the Problem Panel. Each problem is assigned a START date and - when inactive - an END date. Items that have been given an end date are moved from the Active to Inactive window of the Problem Panel.



- 1) Ensure the Item **problem:** is highlighted. Press **Return** to open.
- 2) Close the associated list and click once on the Term Dictionary (Blue Book)
 - Term Dictionary window appears.
- 3) Type: **Hypert** and then select the term *Hypertension* in the list. Click **OK**
 - The term 'Hypertension' is now in the Problem dialogue box.

4) If the Item attributes are not on view click once on the button to reveal them. 

5) Click on the START date to activate it and type: **28091978**. Now click on **OK** to close the problem item window.

- The problem item closes but the contents 'Hypertension' does not appear in the Problem Panel – it must first be validated.

6) Click once on the **Save** button on the Standard Tool Bar and select **Yes** when prompted to validate the transaction.

- 'Hypertension Now Appears in the active Problem Panel.

Recording Non Medication Related Allergies

To record allergies which are not related to medication, such as Gluten, Cat Hair etc. we use the item allergies: Allergic reactions to medication are recorded by using the Drug Module. The technique is fully described in the *Prescription Manager* chapter.

Inserting a new Item

1) Ensure that the item **problem:** is still selected. Now click once on the **Item Selector** button on the Item Panel Toolbar.

- Item selector window opens

2) In the Find box type: **all**

- All items names beginning with 'all' are listed.

3) Select the Item **allergies:** in the list. Click **OK**

- Item 'allergies:' is inserted and automatically opens the associated list'

4) Select **cat hair** from the associated list

5) Click on **OK** to close the item.

6) Ensure the **allergies:** item is still highlighted and press the equals key = once

- New 'allergies:' item created.

- 7) Select **dog hair** from the associated list.
- 8) Set the **Display mode** attribute to: **Content Right**
- 9) Click on **OK** to close the item.
- 10) Ensure the new **allergies:** item is still highlighted and press the equals key = once more.
 - A third 'allergies:' item created.

Recording Non Medication Related Allergies

Using the Term Dictionary

The Term Dictionary was mentioned in session three. We use it whenever the associated list does not have the term we require. Sarah has a gluten allergy. Gluten is not included in the allergy associated list.

- 11) Close the associated list box.
- 12) Click once on the **Term Dictionary Button** (blue book)
 - Term Dictionary windows opens.
- 13) Type: **glut** in the **Find** box. Select the term **gluten** in the list and then click on the **OK** button.
 - 'Gluten' term is inserted as a response.
- 14) Set the **Display mode** attribute to: **Content Right**
 - That completes the Sarah's medical information.

Saving a Patient File

Select **Save** on the File Menu and select **Yes** when prompted to validate the transaction.

Select **Close HCR** from the File Menu.

- Sarah's file closes and the patient selector window reappears.

Quitting HEALTHone™

Select **Exit** on the File Menu. Answer **Yes** when prompted.

- HEALTHone™ closes and the desktop reappears.

Summary Guide

To repeat an item - Select the item to be repeated and press the equals = key.

To set item attributes - First ensure that the item is open for editing by selecting it and pressing the RETURN key. Now click on the attributes panel button to display these. Click once again on the same button to hide these.

To change the item display mode - Right click on the item to be changed and select the option *Display Mode* from the menu. Now select the display mode required from the sub-menu'

To view the attributes on an item - Select the item required and click once on the attributes button on the HCR Toolbar.

To use a term from the Term Dictionary as a response to an item.
- Click once on the blue book on the item dialogue box toolbar or type **Ctrl + T**. Now select the term required in the list.

Own Notes

Complete to here – pg 80 on pdf. doc.



Analysis

Analysing Patient Information

One of the strengths of HEALTHone™ is its ability to analyse patient information. There are two categories of analyses: Individual Patient and Population. Below are listed the types of analyses available in each category:

Individual Patient Analyses

- Item Analysis
 - Active Item in a patient's file
 - Any Item in a patient's file

- HCR Analysis - Multiple items in a patient's file.
- Prescription Analysis - Drugs prescribed for a patient.
- Grid Analysis - Numerical data, table/graphic representation, i.e. audiometry charts, percentile charts etc.

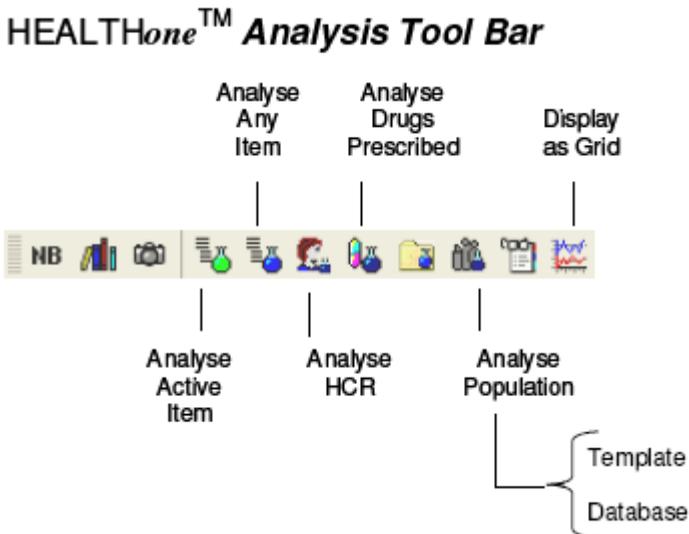
Population Analyses

Template - Produce a document that can be viewed, printed/saved.

Database - Produce results that can be viewed, printed and/or exported.

These analyses all use pre-set analysis definitions. It is also possible for you to create your own definitions to add to the existing lists, however; it is beyond the scope of this manual to describe how this is done. In this session we will be using the standard definitions as supplied with the product.

The various analyses are selected via the HEALTHone™ Analysis Toolbar. In the case of individual patient analysis the patient's HCR must be opened before selecting the analysis. Population analysis does not require a patient's HCR to be open.



The patient John Test has a very mixed history. Ideal for analysis:

Getting Started

1) Start **HEALTHone**™ and Login.

Patient selector window is now open.

Opening a Health Care Record

To open an existing patient's HCR:

- 2) Type: **Te** in the surname filter
- 3) Select **John Test** in the patient list.
- 4) Click on the **Select** button.

- The Health Care Record for John Test opens.

Item Analysis

Item analysis has two forms, Active Item or Any Item. Each has its own button on the **HEALTHone**™ Analysis Toolbar.

Active Item Analysis button. Technique: click once on any item you would like analysed. Next, click on the button opposite. An analyse window opens and displays the value of each occurrence in the patients HCR..

Any Item Analysis button. Technique: click once on the button opposite and select the item to be analysed from the item list. An analysis window opens and displays the value of each occurrence in the patients HCR..

Active Item Analysis

For this we will use the aggregate item Blood Pressure. This is very handy when you would like to see at a glance previous pressures.

1) Select the consultation of the 24/10/1994 by clicking on it once in the transaction overview panel.

2) In the HCR Transaction Detail panel click once on the bold print item: **blood pressure**

3) Now click on the Active Item Analyse Button.

Active Item analysis window opens and shows all blood pressures recorded in the file. Fig 1

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Analysing Patient Information

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Item Analysis

Active Item Analysis

- 4) Experiment with selecting different options in the display filter.
- 5) Close the analysis window by clicking once on the cross in its top right hand corner.

Any Item Analysis

This analysis does not require the item that is to be analysed to be pre-selected.

- 1) Click on the **Any Item AnalyseButton** on the HEALTHone™ AnalysisToolbar.
- 2) Type: **wei** in the Item find box. Select the item: **weight**.
- 3) Click **OK**
 - 'Item Analysis: weight' window opens and displays results.
- 4) Close the Item Analysis window.

Fig.1 Active Item Analysis Window

Aggregate Item Blood Pressure Analysed
Display
Filter

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HCR Analysis

This is a more complex analysis of the Health Care Record. Clicking on the HCR Analysis button, illustrated opposite will cause a list to be displayed. This list contains pre-set analysis definitions. Select the one you require and then click on the **Execute** button. The result is displayed in an analysis window

- 1) Click on the **HCR Analysis** Button.
- 2) Select **Liver Profile** from the list.
- 3) Click on the **Execute** button.

Liver function analysis is performed and displayed in a HCR Analysis window.

Some of the HCR analysis definitions prompt you for a response, i.e. for a start/end date.

4) Close the HCR Analysis window and then click on the **HCR Analysis** button once again.

5) This time select the **Between date x and date y** analysis. Click on the **Execute** button.

The analysis runs and prompts for a start date.

6) Enter **01101997** as a start date. Click on the **TICK** to incorporate the date into the analysis scenario.

The analysis now prompts for an end date.

7) Enter **01101998** and once again click on the **TICK**. The **OK** button should now be active. Click on the **OK** button.

Detail of items between the specified dates are displayed.

8) Close the Analysis Window.

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Prescription Analysis

Like the HCR Analysis in the previous example, the Prescription Analysis also uses pre-set analysis definitions. Clicking on the Prescription Analysis button, illustrated opposite, will cause

the analysis list to be displayed. Select the analysis you require and then click on the **Execute** button. The result is displayed in an analysis window

1) Click on the Drug Analysis Button.

2) Select **Active therapy** from the list.

3) Click on the **Execute** button.

Active therapy analysis is performed and displayed in a Prescription Analysis window.

4) Close the Analysis Window. Select **File / Close** to close John Test's file.

Population Analysis

The population analysis also uses pre-set analysis definitions. There are two different categories: Template and Database.

The *Template* analysis examines every patient's HCR, and as a consequence may take time to complete dependant upon the size of your practice. The *Database* analyses are much faster because they use a different method to access the patient data.

The population analysis window is displayed by clicking on the population button illustrated opposite. Unlike the other analyses, population analysis does not require a patient's file to be open.

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Display all the patient data in chronological order

This is an extremely useful new function in HEALTHone™ version 5.0. It allows you to view all of the patient's file in one « page » that you can scroll through.

You can easily search all the data for any text you like.

You can access this feature by clicking on the icon « display all data in chronological order » which is on the main HEALTHone™ toolbar :

When you click on this icon you are presented with the following screen :

You can now search all the data in the patient record simply by typing some text in the search box :

You will see all the instances of the searched for text including the dates involved. This can be extremely useful for finding any information you wish in the patient's file.

Population Analysis

Database Analysis (Data Ware House – DWH – Built in Analysis)

There are a number of pre-set database analysis all of which display their results on screen and many additionally allow the results to be printed as a report. HEALTHone™ provides an additional tool – called *Query Tool* which can be used to create your own reports.

Example of Database Analysis with a Screen Display Result Only:

- 1) Click on the **Population Analysis** Button on the toolbar and then click on the **Database Analyses Tab**
- 2) Double click the **Cube Analysis** entry in the list.
 - Cube Analysis expands and reveals the ‘Patients Cube (..’ analysis.
- 3) Click on the **PatientsCube (Sex, Age Class, Private/GMS)** analysis to select it and then click on the **EXECUTE** button.
 - Cube analysis activates and displays the results in a window.

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Population Analysis

Database Analysis cont



This particular analysis is purely visual and you are not able to produce in report form. Other types of analysis are displayed and can also be reported and/or exported to other products.

Example of Database Analysis with a Screen Display and Report/Export Options:

We will now close the current analysis and open a new one.

1) Close the current analysis by clicking once on the cross in the top left hand corner of the window.

2) Double click the **Patients seen** entry in the list.

Patients seen Analysis expands.

3) Click on the **Patients with an actual encounter between two dates** analysis to select it and then click on the **EXECUTE** button.

Patients seen analysis opens.

This particular analysis requires additional information before it can be executed. You can select patients by a specific date range or by count of last days:

Click on these buttons to extend/collapse an age/sex/class distribution element.

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Population Analysis

Database Analysis ..continued

4) Select the **Last Days** option and enter a value for the **Day count**. In our example this is **1** This effectively means patients seen today.

5) Now execute the analysis by clicking on the green right facing button on the tool bar. (see illustration).

6) Experiment with these values and date ranges until you obtain a result. Remember to reselect the execute button to reanalyse each time the values are changed.

Analysis produces a results grid – sample in fig. 3 below.

Processing The Analysis Results

Once you have produced a result from a database analysis you can:

Simply view it on screen
Produce a report of the results
Export the results to another product

Viewing Results

You can control the grid display in the following ways:

Viewing Results - Maximise The Window

Click on the centre button of the window control in the top left hand corner of the window.

Viewing Results – Adjust The Width of A Column

Drag the column adjuster bar on the right of the column title to alter its width.

See fig 3 above.

Viewing Results – Hide A Column

Drag the column adjuster bar on the right of the column title to the left to hide the

column name. See fig 3 above.

Fig 3 Sample result grid of Patient Seen Analysis

Column Width

Adjuster Bars

Row Height Adjuster Bars **Ctrl + Drag Column Name**
to Reposition

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Population Analysis

Database Analysis ..continued

Viewing Results

Viewing Results – Reposition A Column

Hold down the **Ctrl** key and drag a column by its title area to the left or right to

reposition it. See fig 3 above.

Viewing Results – Adjust The Height of All Rows

Drag any row adjuster bar on the left of the grid to alter the height of all rows.

See fig 3 above.

1) Experiment with the various controls.

Display grid alters.

Produce a Report Of The Results

To produce a report of the analysis result you simply click on the preview button. Some reports have a pre-set format regardless of the settings of the grid; others will reflect any changes made to the grid.

Once previewed clicking on the print button in the preview window will print the report.

- 2) Click on the **Preview** button
 - Report previewed
- 3) If you wish print the report by clicking on the **Print** button.
 - Report prints
- 4) Close the preview window. Close the analysis window. Close the Population Analysis Window.
 - Patient selector window should now be back in view.

Exporting The Results

To export the results click on the export button in the analysis window. It will be saved to the location of your choice as a delimited text file.

Adjusting Grid Display

When you have adjusted a grid display to the settings you prefer HEALTHone™

will remember these and the next time the analysis is used it will appear

with the
new settings.

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Template Analysis: This form of analysis has been superceded by the Built in Database analysis and the User definable database analysis known as “Query Plus”. The Query Plus is described in a separate chapter.

Template analyses produce a text report that can be printed and or saved for future reference. This report is displayed in the HEALTHone™ text editor – which we will learn more about in the next session. There are a number of pre-set analyses in this category and these can be added to by creating your own.

Clicking on the Population Analysis button, illustrated, will cause the analysis list to be displayed. Select the category and analysis you require and then click on the **Execute** button.

- 1) Click on the **Population Analysis** Button on the toolbar and then click on the **Template Analyses Tab**
 - 2) Select **Patients seen on one day** from the list.
 - 3) Click on the **Execute** button.
 - 4) A screen prompts you for the date required. Enter a valid date and click once on the **TICK** to use it in this analysis.
 - 5) The **OK** button should now be active. Click once on it.
- All patients seen on the day specified are listed in a report and displayed in the HEALTHone™ text editor window. Fig.2

Template Analyses display their results in the Text Editor document window. If you wish to keep the results you can save the document via the menu **File / Save**. If the document has not been saved HEALTHone™ will prompt you to *Archive* it as an external file or discard it completely when closing the it via the **File / Close**

document menu.

Fig.2 Text Editor Window

Results of Population Analysis Displayed

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Population Analysis

Template Analysis..continued

For now we will close and discard this document.

Select the menu **File / Close document**. Select the discard option as illustrated and click on the **OK** button.

Document is abandoned and the Text Editor closes.

Grid Analysis

This form of analysis is specifically suited (although not exclusive) to analysing and displaying numeric information. The analysis is performed on a patient rather than population basis.

Once extracted the analysed information can be displayed in a table or as a graph. If text items were analysed the result would only be meaningful in a table

Grid analyses are based on one of three sources:

*** Predefined Grid Analyses * Any Sequence of Items * Any Aggregate Item**

When you are more experienced with using **HEALTHone™** you will be able to create your own Grid Analyses, Sequences of Items and Aggregate Items. For now, we will use those supplied as standard with the product.

In addition there are two predefined analyses:

Growth Analysis
Audiometric Analysis

These each have their own button in the Grid Analysis window (see below) and require no further action other than clicking on them.

Technique

Open the patient file to be analysed
Activate the grid analysis (by clicking on the Grid Analysis Button on the HCR Analysis Toolbar illustrated opposite)

The Grid Analysis Window opens:

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Grid Analysis

The Grid Analysis Window opens:

Technique ..continued

- Select the source required, Grid, Sequence or Aggregate Item by clicking on the Grid Analysis Source Selection Button.

The Grid Selector window opens:

Growth
Analysis
Chart
Button
Grid Analysis
source selection
button
Audiometric
Chart
Button
Magnify
View
Button
Filter Button Display Mode Buttons

Graph or Table

Graph

Type

Buttons

Type here to

locate an analysis

Select analysis

required here

Select analysis

source here

Detail of which items will be

analysed displayed here

Click here to restrict the

analysis to a date range

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Grid Analysis

- Select the required analysis.
- Click on the Select Period box if you wish to restrict the analysis to a date range.
- Click on the **OK** button to activate.
- If the Select Period box was selected complete the date range as required.

The results are initially displayed in tabular form in the Grid Analysis window. You can now:

- Filter the results
- Choose which results are displayed.
- Choose how to display the results – Grid or Table.

John Test's HCR should still be open. If you have closed it in the



meanwhile open
it again now.

Activating the Grid Analysis

- 1) Click once on the **Grid Analysis** Button on the HCR Toolbar.
 Grid Analysis Window opens.
 - 2) Click on the **Grid Source** Selector Button.
 Grid Selector Window opens.
 - 3) Ensure that Grid is the selected source.
 - 4) Select **BLOOD PROFILE** as the analysis in the group box.
 - 5) Click on the **Select Period** box to tick it.
 - 6) Click on **OK** to begin the analysis.
 Because the Select Period box was checked you are now prompted to enter a date range.
 - 7) There is no need to type the forward slash marks in the date.
Select the *from* date and type **01 01 1994** Select the *to* date and type **31 12 1995**
-
- Analysis on John Test blood results appears in tabular form in the Grid Analysis Window. See Fig.4

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Grid Analysis

Choosing a Table or Graph

This is very straight forward, simply click on the display mode button required.

- 8) Click on either display mode button to switch between Table and Graph displays.
- 9) Select Graph display

Choosing a Graph Type

The choice here is Stacked or Overlapping axis. Selection is via buttons once again:

- 10) Choose each graph type in turn
 - 11) Reselect the **Table** display once more.
- Screen appears once again as in Fig.4 above

Additional Menus

HEALTHone™ now has three additional menus displayed:

Grid Analysis
Grid
Graph

These are an alternative means of selecting the various display options encountered so far, plus a few extra items:.

Ensure that you are in Table Mode.

Fig. 4 Grid Analysis Window

Results of BLOOD PROFILE Displayed. Figures in brackets are reference range.

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Grid Analysis

The Grid Analysis Menu:

This allows you to quickly select Grid Analysis or the two special analyses Growth and Audiometric and select the display mode required.

1) Experiment with **Grid Analysis / Show /Graph** and **Grid Analysis / Show /Grid** menu options

2) Reselect the menu **Grid Analysis / Show /Grid**

Table once more in view.

The Grid Menu:

This is applicable when you are in Grid (Table) display mode.

Experiment with the various options on the Grid Menu.
Select the menu option **Grid Analysis / Show /Graph**

Additional Menus

The Graph Menu:

This is applicable when you are in Graph display mode.

Experiment with the various options on the Graph Menu.
Cancel any changes to the customise menu if you have made any.

Printing Grid Analysis

When the Grid Analysis Window is open you can print whatever is displayed by selecting the menu sequence:

7) **File / Print**

Closing the Grid Analysis Window

This can be done by clicking on the cross at the top right hand corner of the window
or by selecting the menu sequence:

8) **File / Close Grid Analysis.**

Finishing This Session

No new transactions have been added to John Test's file in this session.
All we need do in to close **HEALTHone™**:

Select the menu sequence: **File / Exit**



- **HEALTHone™** Closes.

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Summary Guide

To Do Page

To analyse a selected item

Short Cut = **Ctrl + I**

Open the file of the patient to be analysed.
Select the item to be analysed and click once on the 'Analyse Active Item' button on the **HEALTHone™** Toolbar.

3

To analyse any item

Short Cut = **Ctrl + M**

Open the file of the patient to be analysed.
Click once on the 'Analyse Any Item' button on the **HEALTHone™** Toolbar. Select the item required to be analysed from the list.

4

To analyse the complete Health Care Record for a patient.

Open the file of the patient to be analysed.
Click once on the 'Analyse HCR' button on the **HEALTHone™** Toolbar. Select the

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analysis required from the list and click the **Execute** button.

5

To analyse the drugs prescribed to a patient Open the file of the patient to be analysed. Click once on the 'Analyse Drugs Prescribed' button on the HEALTHone™ Toolbar. Select the analysis required from the list and click the **Execute** button.

6

To analyse the entire patient register.

Short Cut = **Shift + F7**

Click once on the 'Analyse Population' button on the HEALTHone™ Toolbar. Select the analysis type: Template or Database by clicking on their respective tabs. Now select the analysis required from the list displayed and click the **Execute** button

7

8

To create a grid analysis Open the file of the patient to be analysed. Activate the grid analysis window by clicking on the 'Display as Grid' button on the HEALTHone™ Toolbar. Now, decide on the type of grid analysis required and click on the appropriate button in the grid analysis window:

Growth Analysis

Audiometric Analysis

Grid Analysis

If you select a grid analysis the grid selector window will open. Now select the grid analysis source:

Grid
Aggregate
Sequence

Select the analysis required from the list.
Click **OK**.

14

To change between grid and graph Select the grid analysis as required. Click on the appropriate button illustrated.

14

To change graph types. Select the grid analysis as required. Click on the appropriate button illustrated. **14**

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Own Notes

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Introduction

The Prescription Manager (PM) is used for the prescribing of two types of prescriptions :

repeat prescriptions and acute prescriptions

The first part of this chapter will deal with editing and printing of a simple drug prescription

In the second part, we shall discuss the management of the prescription.

We will look at the

more complex aspects such as repeat prescription management, the

price of the

prescriptions and the renewal of prescriptions.

Opening the Prescription Manager

In the majority of cases a prescription will be issued during the course of a consultation.

However, in some cases the prescription may be the only reason for the contact. In either

case, it is necessary to create a new HEALTHone™ transaction.

A sequence, for example the medical sequence SOAP. May contain the item « drug

prescription » . Never the less, if you create your own transaction, you may directly enter

the item « drug prescription »

When a patient file is open and a medical transaction has been created, the prescription

Manager (PM) may be opened in several ways.

- Simply click the icon « prescribe a drug » from the tool bar at the top of

the
patient display window.

Double click or press the Enter key when the « drug prescription » item is highlighted, if this item already exists in the transaction.

Press the combination hot keys Alt+F2.

Select the menu « insert » - « prescription ».

Note: If you open the PM while an existing transaction containing prescribed drugs, is active, the drugs in this transaction will appear in the PM. This is used for editing existing prescriptions or for re-printing a prescription.

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Prescription Module – Main Screen

The Prescription Manager contains four main panels

1. Drug Selection Panel = Drug list panel – Top left
2. Allergy/Adverse reaction Panel – Bottom left
3. Repeat Prescription panel = Repeats panel – Top right
4. Current Prescription Panel = Active prescription – bottom right

Drug Selection Panel = Drug List panel.

This panel is used for selection the desired drug. You can choose your drug from a list of brand names or from a list of generic names or from the private database.

You can also choose a drug from any list of drugs already prescribed for this patient as per the screenshot below.

By default, the IPU database containing the entire list of brand names is displayed.

When you type some letters contained in any part of the drug name, the list will be filtered accordingly.

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Selecting a drug from the supplied database :

The contents of the search panel is as below :

The search zone allows you to see directly the drug as you will prescribe it, including the dosage. The presentation is included in the drug name.

The drug search window also allows you to directly choose a dosage for a drug that may have several dosages predefined by the user. We will see later how to associate dosages with drugs.

Click the button to show the list of predefined dosages. Select the appropriate dosage for this patient.

From the search zone, you can also use the « Ctrl+Up_arrow » or « Ctrl+Down_Arrow » to switch between dosages.

Selection from generic list :

To select from the generic list, Open the menu and select « Irish Specialty (IPU – Generic) » or use the Hot keys Ctrl+G

Drug Name
Pack size
Predefined dosage (if any)
Patient instructions
Pack price
GMS code

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Type in a few letters for the required drug

This list can be made the default view when you open the PM. This will be described later.

Selection of a list from drugs already prescribed to this patient :

Open the menu item below. Select the view you require : Repeat Prescriptions, History, Active Therapy or last prescription.

You can use the following Hot keys to achieve the view you desire :

- CTRL+K for repeats
- CTRL+U for Active Therapy
- CTRL+H for History
- CTRL+L for last prescription

Note: 3.7 users. This view is now available on the left hand panel as well as the top right hand panel as you were used to.

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Repeat Prescription view displays the pack size and the drug name.

The History and last prescription views also contain the date the drug was last prescribed.

For all these views, typing some letters will reduce the list as with the main product filter.

REPEATS PANEL :

***The right hand top panel – contains the prescriptions from the patient file
(repeats, history,)***

This panel allow you to view, exactly as in the product search panel, the drugs that are contained in the patient file. These views are optional and were included so that you can see the repeats at all times. This is the default view for Irish users.

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The repeats view contains the following information :

- Quantity = number of tablets prescribed for the repeat period
- Prescription = name of the drug
- Dosage = dose to be taken daily..
- Remaining repeats = Total allowed repeats less the number of times prescribed so far (before required review, for example)
- Repeat by = number of repeats given in one shot e.g. 1 month 3 months 6 months etc
- Last prescribed = the date the drug was last repeated
- Generic name of the drug

To change the view, simply click on the menu and choose the view you require.

You may also use the Hot Keys as follows :

- SHIFT+CTRL+K for Repeats
- SHIFT+CTRL+U for Active therapy
- SHIFT+CTRL+H for History
- SHIFT+CTRL+L for the last prescription

Note: The repeat prescriptions are saved to the Basic medical Information transaction and are visible at all times from within the patient file from the « view » tabs

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Allergies and Adverse reaction to Medication Panel:

This panel displays any adverse reactions to medications and allergies :

Normally HEALTHone™ stores all drug allergies in the item « Adverse reaction to medication » and stores this item in the basic medical administration transaction.

By convention we use the « allergy » item to store non drug items such as house dust mite etc.

We will describe how to insert adverse reactions later.

Current Prescription Panel :

This panel displays all the drugs prescribed in this session or, if you open an existing transaction, any drugs prescribed in that transaction.

The toolbar at the top of this screen shows the following :

1. Number of drugs prescribed in this prescription set.
2. The Date of the prescription
3. The total price of all drugs in this set
4. Drug take – this is the schedule for the patient and can be printed here
5. Next prescription set in the transaction. See later for details of this.

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Prescription Technique

Prescribing and printing an acute Drug

The acute prescription is selected from the standard drug list on the left. Once selected the drug will appear in the active prescription panel. It is then ready for printing

Technique – Prescribing Drugs

In this example, we will prescribe a drug from the list of branded drugs. We can describe prescribing from the other lists later.

Open the patient file and create a new consultation

1) Open the prescription Manager (PM) by hitting the Hot Key combination **ALT+F2**.

The PM opens. If this doesn't happen then use the menu item « Insert – drug prescription ».

2) Make sure you have selected the « Irish Specialty – (IPU) from the list in the top left pane.

1) In the filter box type a few letters : « TENOR »
 All the drugs that have the letters TENOR will appear in the list, sorted alphabetically.

2) Press the ENTER key or Ctrl+N to begin a new acute prescription, The drug edit window is displayed.

**Drug
Selection
Panel
Active prescription
panel**

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In this example we will prescribe one tablet once a day for 28 days. The quantity will be calculated automatically, based on the duration.

3) You may also insert patient instructions, which may be printed later.

A detailed description of the drug edit screen follows.

4) Click **OK**.

The drug is prescribed and now visible in the active prescription window.

- 5) Repeat the operation for other drugs
- 6) Click the print icon on the tool bar at the top of the HEALTHone™ screen
or use the Hot Key combination CTRL+P

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- 7) You may also view a print preview of the prescription before it goes to the printer.

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5.1 Prescription Manager Page 12 of 35 ***Management of Repeat prescriptions***

Creating a repeat prescription

There are several ways to create a repeat prescription from the drug list. First of all you should select a drug from the drug list on the left.

1. You can use the **mouse** to « Drag & Drop » your selected drug from the drug list to the repeats panel.

- 2.

2. You can use the **Hot Key** Combination Alt+right arrow (open editor first) or CTRL+Alt+Right arrow (by pass edit screen if dosage already defined)
3. You can press the edit button , and tick the « Repeat » on the top right hand side of the edit window
This box can be ticked by hitting the combination keys Alt+R
4. You can also « Drag & Drop » your selected drug from the current (acute) prescription panel to the repeats panel.
5. You can edit the acute prescription in the acute prescription panel and tick the Repeats box
6. finally it is possible to send a drug from the list of drugs on the left hand panel to the repeats after hitting Enter on it by ticking the Repeats box and un-ticking the prescribe box (bottom left of edit screen)

The repeat prescriptions are saved to the top right hand panel of the PM. By default this panel shows the repeats but it can also be changed to show other prescription sets from the patient file.

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The repeat prescriptions are saved to the basic medical Information transaction.

These drugs are also automatically visible from the patient file with the PM closed.

They are included in the « views » tabs on the top left hand side of the patient record.

This view can be made the « default » view for these tabs by using the menu item tools/options/general and changing the default analysis tab setting on the right hand side

Prescribing from Repeat Prescription List

Here is a typical list of repeat drugs in the repeats panel.

Managing the list of repeats :

1. You can select one or several or all drugs in the list as follows :

- Select a drug with the mouse. Hold the CTRL key down and then click several drugs to make a multiple selection
- Select all by clicking on the little square box on the top left of the PM screen

or hit the Combination Keys **CTRL+A** to select all drugs in the list

3. You can define the « repeat by » quantity by selecting the drugs you require

and then simply typing a number such as 3 or 6 for 3 monthly or 6 monthly

scripts.

You do this also by selecting your drugs and clicking on the repeat by icon on the tool bar

4. You can define that a drug or selection of drugs is being dispensed by the doctor directly.

5. Once you have made your selection and decided how many months repeats

you want to give the patient you are ready to prescribe the repeats to the « Current prescription » panel, ready for printing. There are several methods of doing this.

Click the icon « prescribe all » will automatically select all the repeats and prescribe them to the current prescription panel

Note : hitting the F8 key will do the same thing

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Drag your selection with the mouse from the repeats panel to the current

prescription panel

If you are selecting more than one drug, hit the Enter key or CTRL+Enter and they will be prescribed directly

Stopping repeat Prescriptions

To stop a repeat and record the fact that you stopped it in the patient file you can

click on the « stop » button

You can also indicate the date and the reason for stopping :

Deleting a Repeat prescription

To delete a repeat prescription with no record of the deletion saved, select the drug in the repeats panel and click on the delete button .

Conversion of Repeat prescriptions from 3.7 version of HEALTHone™

This subject is explained at the end of this chapter

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Multiple prescriptions in the same session:

The PM allows you to create more than one prescription in the same transaction.

This may be necessary, for example, when a patient returns, having received a prescription, because they forgot something or if you want to print some drugs on different forms for a single transaction.

To create a new prescription, simply click on the button situated on the tool bar

above the « Current Prescription » panel, and then prescribe new drugs.

The counter to the right of the icon indicates how many prescriptions there are in the transaction and the number of the prescription being currently displayed

In the patient file each prescription is contained in a separate « aggregate » of the item « drug prescription »

Represents an **acute** prescription

Represents a **Repeat** prescription

(orange colour) Represents a prescription « **on hold** »

Regarding the printing, the different instances may be printed separately or on the same form.

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More Details on prescribing :

Searching for a drug

You may search for drugs using various options :

By default, the PM searches for the characters entered in **any part** of the drug name

Thus, if you are looking for « colostomy bags » and you enter the text « colostomy »

you will get what you want, even though the item name does not start with the characters entered.

Note: it is also possible, for example, to search by number. In this case it is necessary to precede the text by a « star » : *

Example : Search for clonamox 250mg

It's possible to change the search options by changing them in the menu item

Options/drug Module.

- Search on any part of the drug name. If this option is **not** ticked, the search is made on the first letters of the drug name only. If this option is ticked, you can search for a drug by typing in letters from any part of the drug name.
- Search on an empty value : If this option is ticked, all drugs in the database will be displayed immediately you open the PM, when you have not typed in any search criteria. If it is not ticked, no drugs will be displayed until you start typing your search criteria. Use the unchecked option if you need the PM to open faster.

Note: Some advice : If your search is made on the start of the drug name, you can put a space in first and then you will be searching the following text in any part of the drug name.

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Searching for drugs based on the « Equivalents »

It is possible to filter a list based on the equivalents of a given drug. Click on the button on the tool bar.

If we choose the first option above « active substance », having first typed
“tenormin” as our search criterion, we get the following result

The PM displays all drugs containing « atenolol» in all its forms.

If I choose « chemical subgroup » as my filter after choosing tenormin I
get :

The PM displays all drugs that are selective beta blockers.
And so on...

- Pharmacological class = list of all beta blockers
- Anatomic level = cardiovascular drugs

The filtering of these equivalent classes is based solely on information
provided by
the database distributor

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Filtering a drug by “Alternates”

This is commonly used to find the cheapest alternative to a given drug. Let's take the tenormin example again: Choose tenormin 100mg tabs

Now right click on the drug name highlighted and choose the option “alternates” from the list

You can achieve this also by hitting the Hot Keys combination <Alt+A>

Now you will see displayed, a list of all drugs containing atenolol 100mg tabs. This list is automatically sorted from cheapest to most expensive

You may now prescribe directly from this list.

Note: You can also prescribe the chosen drug by its generic name using this right click menu. You can also create an allergy for this drug from here (see later)

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Prescribing a drug to the active prescription panel

There are several ways to prescribe a chosen drug from the drug list to the active prescription panel.

1) prescribe directly without opening the drug prescription editor : Use the prescribe button or hit the Hot Keys CTRL +N (N for **New** prescription)

Note : If a dosage has not been defined for the drug, the drug editor will always appear when you prescribe it

2) Edit the prescription before prescribing: Use the button « Edit » or hit the Hot Keys CTRL + E (E for **Edit**)

3) Use the mouse to select the drug and drag it to the active prescription panel

4) Simply hit the Enter key. What happens when you hit the Enter key can be defined in the Options. It may be set to direct prescribe or open the edit screen first.

From the above screen you can see that Ctr+Enter can have the opposite effect to the Enter key..

Note: If you select the tools/option of « edit before prescribing » and at the same time « prescribe directly from repeats.. » is ticked, hitting the Enter key will open the editor for drugs selected from the database but not when you select drugs from the top right panel (repeats, history..)

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Prescription Editor

The Drug editor dialogue allows you to do the following :

- To prescribe a drug as a repeat **OR** as an acute prescription, or both
- To define and save several dosages for each drug.
- The start and end dates for a prescription, if required.
- To define a dosage schedule which can be given to the patient
- To define a series of other options

If you wish to send a drug to the repeat panel simple tick the <Repeat> check box.

Pre defined dosage list.
The dosage and
start/end dates
The dosage
(planning) schedule
Information for the patient
and for the doctor
Other user controlled
parameters

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The dosages :

The list of formulations available is now reduced to a manageable number of realistic possibilities. As well as this you can simply enter you own free text formulation. All calculations based on a free text formulation, however, will be the responsibility of the user.

The editor allows you to format the dosage and formulations easily. In the numbers boxes, you can enter not only numbers but also special characters to allow for further flexibility

For example, for the dosage you can enter the following :
1/2 Tablet, 2-3 tablets (2 or 3), 1 – 1/2 tabs etc.

The automatic calculations will be correct if the PM understands what you have entered.

For the price you can always insert this manually but you are then responsible for any further calculations made there on.

The dose edition zone displays all the dosages that were saved by the user, with the default dosage indicated in bold type.

.

When you first open the module the default dosage for all drugs will be 1 daily for 28 days. The user can change this, save it and it will be remembered for this drug there after.

The PM will calculate the quantity of a drug based on the dosage and the duration of treatment. However, if you modify the quantity manually the PM stops calculating.

If the PM cannot ascertain what the formulation should be, it leaves it blank and coloured in pink.

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The user can then enter his own formulations as follows :

Note the quantity is in yellow. This indicates that the user has manually entered the quantity

Let us take an example of Prednisolone as a prescription.

The PM automatically calculates the quantity based on the duration as input by the user.

If you want to change the Duration, say to 7 days, the quantity will automatically be updated.

Note that the price is also automatically updated. However, if you manually change the formulation or quantity of a drug such that the PM can't calculate the price, you can insert the price yourself as below, by simply double clicking on the price.

Please note that this is not recommended unless your formulations are completely unknown to HEALTHone™. You are responsible there after for the accuracy of this

price.

You may also insert a free text dosage by clicking on the button

or Hit the Hot Keys CTRL+T

Enter any free text you like or choose from the list of common terms offered

(use the Hot keys CTRL+ENTER to create a new line)

As regards the list of dosages, each time you prescribe a drug and enter a dosage for the first time, this dosage is saved to the list of dosages. Every time you prescribe that drug, for any patient, from now on, this dosage is presented as your first option.

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The following commands allow you to manipulate the list of dosages :

- : Insert the currently displayed dosage to the list of saved dosages (Ins)
- : Update the selected dosage to that of the displayed dosage (CTRL + S)
- : Delete the highlighted dosage (CTRL + Del)
- : Select the previous dosage (CTRL + Arrow Up)
- : Select the next dosage (CTRL + Arrow Down)
- : Make the highlighted dosage the default dosage (CTRL + M)

The dosage schedule = drug take during the day

You enter the schedule directly as above individualised for each patient, with a comment if required.

- You can enter the actual number of tabs to be taken
- You can use, for example, an X to indicate when the medication is to be taken.
- You can use fractions or brackets to indicate, for example, an optional dose

Here are some examples :

Prednisolone 5 mg
2 before breakfast, 2 before
lunch, 2 before dinner and 2 at
bedtime if necessary

Prednisolone 5 mg
take before breakfast, before
lunch, before dinner

Prednisolone 5 mg

take during breakfast, ½ tab
during lunch, before dinner if
necessary and ½ at bedtime if
necessary

The icon on the top left border indicates if this table should be printed with the prescription.

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Drug Information

There are several ways to view information on any drug as supplied by the manufacturer :

1. Click on the information icon on the top bar of the PM
2. Hit the combination Keys ALT + Enter
3. Right click on the drug and choose the option « product information »
4. Click the Pill icon on the top right of the drug edit screen

Prescription Manager – prescribe by disease – sets

In the drug pick list window we can search for drugs « by disease »

The principle here is that you define a prescription set for a particular condition and then you can prescribe the entire set of drugs in one shot to the active transaction.

The most obvious example for this is helicobacter. In this case you would prescribe the 3 drugs in the normal way from the main IPU drug list, to the active transaction. You will have decided the dosages while prescribing.

Below we have prescribed 3 drugs to the active transaction for helicobacter. If we select all 3 and right click we can see two new menu items « add to drugs by disease » and « send to disease »

Once you have created your own new « disease » label, you can add any number of drugs to this disease set for later prescribing the entire set in one shot.

Now you can choose the « drugs by disease » list in the same way as you choose brand/generics etc, and prescribe from there.

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Note that if you have defined a default item for drug sets in tool/options, and if you enter a content into this item, in HEALTHone™ that has a corresponding disease set in the PM, this drug set will be automatically proposed

when you open the PM – as opposite.

Now you can prescribe this «drug set » to the active transaction and all the drugs will be prescribed.

Note : the edit screen will open for each drug if you simply drag the disease. If you hold the CTRL key down while dragging, the drugs will be prescribed directly if a dosage has already been assigned.

This behaviour is exactly the same for normal prescribing.

Ctrl_Enter or Ctrl_drag = prescribe directly if dosage defined.

Management of allergies/adverse reactions to medications :

The prescription Manager allows you to define both « allergies » and « adverse reactions to medication ». If you define either of these from the drug list, then

HEALTHone™ will display an alert if you try to prescribe them. By convention, the

Irish users have adopted the use of the item « Adverse reaction to medication » as

the way to declare a drug allergy. We use the item « allergy » to define an allergy

against a non drug item such as « cat hair » « house dust mite » etc.

However,

using either of these methods in the PM will give an alert if used for a drug.

For the purposes of this discussion we will use the term « allergy » to mean

« adverse reaction to medication » only.

The adverse reaction may be declared by different methods in the PM.

- Direct from the allergy section (lower left panel of the PM)
- During the prescription of a drug
- When you « stop » a drug, you can give an allergy as a reason for stopping it.

The allergy is normally declared in the allergy panel at the bottom left hand side of the PM. Note : this panel can be hidden by option

The same display is available directly in the patient file – top left views « allergies »

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Adding an allergy from the allergy panel :

Click the button or hit the combination keys Shift+Ctrl+A

Adverse drug reactions use the « allergen group » as the default drug filter type.

Thus you decide a patient is allergic to penicillin, meaning all penicillins.

This is the commonest way of creating an allergy.

However, you can also declare an allergy using other drug ingredients as seen in the drop down list.

You can click on the down arrow next to the « allergen group » icon to see this list. Alternatively you can use the Hot Keys combinations Ctrl_Right arrow and Ctrl_Left arrow to move from one list to the next.

○ ATC Code: **(Anatomic Therapeutic Chemical Classification)**

Filters the drugs by their therapeutic actions e.g. anti hypertensives etc

Type in the first few letters and the list will be reduced. You can also click the button to choose from a hierarchical list.

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○ Ingredients :Filters the drugs by their ingredients e.g. potassium, iodine etc. This may not be very useful for most users

○ Free text: You can also use free text descriptions to enter your own drug names, perhaps if they don't exist in the other lists. Note that the entries to the free text list will not trigger an alert in the PM when you prescribe them. They will, however, be visible in the allergies panel

You can give an adverse reaction a « severity index » from 1 – 7

Defining an adverse reaction directly from a selected drug

After selecting a drug (from the drug list or from the repeats panel), you can declare

an adverse reaction to this drug by right clicking on the drug and choosing the command: « Create an allergy or adverse reaction »

or by hitting the Hot Key combination Ctrl+Alt+A.

When an adverse reaction is created using this method, the coding possibilities are different

In the following examples we used the drug name « augmentin » as our selected drug.

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1. ATC code: The dialogue displays the ATC codes related only to the selected drug

You can choose between a specific ingredient and broader classifications as below.

2. Ingredients : The dialogue displays the different ingredients in the selected drug. You can choose one or several ingredients

- Product: This is the default display when you choose an adverse reaction when selecting a drug.

- Free text: This is the same mechanism as when defining an adverse reaction using the allergy panel.

Defining an allergy as a cause for stopping a drug

When you stop a drug, say a repeat, you are asked the reason for stopping. One of the reasons is an allergy/adverse reaction
You can also edit an existing adverse reaction (edit the reaction or gravity only)
You can delete an adverse reaction.

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Management of the private drug database

To select a drug from your own private list of drugs click on the drug database selection button on the top left hand panel. You will see a drop down list. You can also use the Hot Key combination Shift+Ctrl+B.

The tool bar at the top of the PM allows you to :

- Create a new private drug
- Edit the selected private drug
- Delete the selected private drug

Create a new private drug

Click the button to add a new drug to the private database.
You should fill in the boxes as in the dialogue below

Enter the drug name. The drug name should include the strength and the strength unit.

The rest of the form is optional.

In the case of liquids or topical medications you should also fill in the « pack size units » boxes.

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Editing of a private drug

Click the button to edit the selected private drug. The same edit dialogue box is opened and you can change any of the information

Deletion of a private drug

Click the button to delete the selected private drug

IMPORTING PRIVATE DRUGS FROM 3.7 versions of HEALTHone™

You can import all the existing drugs from you own private database. To do this you

use the command « import private database » from the main HEALTHone™ menu

The following screen then pops up to allow easy import of the database

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Prescription Manager – Practice Formulary

Practice formularies can be defined in the prescription manager options window. The

Prescription manager options can be accessed by clicking on the main

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menu « tools
options prescription manager OR alternatively direct from within the
prescription
manager by clicking on the button :

Below is a screenshot of some of the prescription manager options :

We have three user-defined
formularies. These can be named as
you wish. However the first formulary
is named « practice formulary » by
default.

Once you have set up the practice formularies in the tools options menu,
you can send
drugs from the IPU list to your formulary for inclusion. You do this by
choosing the drug
from the main IPU list, right clicking on the drug and clicking « send to
search form »
practice formulary

You can do the same thing from the repeats window and from the active
transaction
window. In this way you build up a list of preferred drugs that suits your
own practice.

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The prescription Manager Options – Summary

The prescription manager options can be accessed either by the HEALTHone™ main menu item **Tools/Options/Prescription Module**.

OR

By clicking the button in the main bar of the prescription manager.

1. Search on any part of the drug name:

If this is ticked (the default), then when you type some letters when searching the IPU list, these letters need not be the first few letters of the drug but can be found anywhere in the drug name.

Note : Even with this option unchecked, if you put a space before the first letters of your search, you will get a wide search i.e. it will act the same as if you had the option ticked.

2. Search on empty value:

If this is ticked, the IPU list is loaded when you open the PM. Thus you will see some of the first drugs in the list before you type anything.

If this is unchecked, the list remains empty until you type something. This should make for quicker opening of the PM because the list does not have to be loaded until you start typing.

3. Stay active for (28) days:

Normally when you prescribe a drug, it remains active for the duration specified in the dosage. Sometimes this is not appropriate. For example, if you prescribe

GTN spray 1

dose once a day, it will remain active for over 100 days. By using this options you

control how long *HEALTHone*™ will consider the drug « active ».

Note that all repeat prescriptions are considered « active » until they are removed from the repeats.

4. Insert the prescription at the end of the transaction :

If not ticked, the prescription will be entered at the highlighted item in the transaction

5. Default repeat number :

When this number of repeats have been issued, *HEALTHone*™ will grey out that drug

in the repeats so that it will have to be « re-activated » before it can be prescribed

again. If this number is changed (to 12 say), then for all future prescriptions the default

repeat number before checking will be 12.

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6. Apply to all drugs :

This relates to 5 above. If this is ticked, then when you change the default repeat

number, all existing repeats will revert to a default of 12.

7. Display overdue repeats in red :

If the month is up, for a single month's prescription, the drug will appear in red.

8. Default duration for prescriptions :

The default duration for repeat drugs is 28 days. You can change this default here to,

say 30 or 31.

9. Drug set :

If this is ticked, then if you have a drug set by disease matching this term, that drug set

will be automatically proposed when you open the PM.

10. Layout: This is self explanatory. It is here that you can decide the default views for the

left and right upper panels of the PM.

11. ENTER KEY

- These options determine what happens when you hit the ENTER key after selecting a drug.
- By default hitting the enter key will open the drug edit window. In this case you can skip the edit screen if you hit CTRL+Enter
- Even if you have the Enter key = open the drug edit screen, you can make it prescribe directly from the repeats.
- In all cases, if the drug has no dosage defined, the edit screen will always open
- Remember that you can easily see if a drug has a dosage defined, without opening the edit screen by looking at the middle panel of the left hand side of the PM.

12. **Interactions:** here you can decide what level of interactions you want the PM to warn you about. The interactionsalert can also be turned off for drugs prescribed from repeats.

13. **Print options: show print dialogue** - This determines whether you print directly or show the printer list before printing when you hit the **print** button in the PM. This option is also available in the print screen itself

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Conversion of Repeat prescriptions from 3.7 version of HEALTHone™

Because we are using an entirely new drug database, the IPU database, as our pick list in version 5.0, we have to “convert” our 3.7 drugs, which were entered using a different database, the IDDF database. There is no link between the two databases which would allow a direct “translation” of the IDDF drugs to the new IPU drug list.

However HEALTHone™ does have a list of all the drugs in each patients record and it can directly enter these drugs into the repeats window of the version 5.0. You can continue to prescribe these drugs from the repeats as you have always done with no effort on your part. However, these prescriptions will have no link to the new drug list and this will lead to some restrictions, namely there can be no

allergy/interaction checking; nor can HEALTHone™ update the prices or other drug information, for these drugs.

We therefore strongly recommend that you use the “convert repeats” button on the repeats panel of the PM so that HEALTHone™ can attempt to pick a drug from the IPU list which is the same as that you have already prescribed. These drugs are coloured orange in the new PM until they are converted.

Before conversion: Drugs in yellow are from the IDDF database. Drugs in white are from the private database

After Conversion: In this case all the drugs were successfully converted.
Note: the private drugs are NOT converted, they can't be! As most of the drugs you previously had in your private database are not contained in the IPU database, we suggest you replace these drugs with those from the IPU drug list. You can, if you wish convert your own private database to a new 5.0 private drug database. This will be described later.

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Conversion of 3.7 private drug database to a 5.0 private database

It has already been noted that most of the drugs you used from your private drug database in 3.7, are available now in the new IPU drug list. If you replace these drugs with those from the new drug list you will have the following advantages :

- The names of the drugs/appliances will be correct as in the MIMS.
- The drugs will have all the attributes of any other drugs from the IPU, namely, a, interaction, pricing information, drug information, all of which were not available with drugs from the private list.

With the Prescription Manager (PM) open, click on the **HEALTHone™** main menu item
« Prescriptions » :

From here you can import all you old private drugs to the new 5.0 private drug database.

NOTE: Drugs prescribed from the 5.0 private database will have the same “properties” as those in the 3.7 private drug database: they will be entirely user controlled and will not have any relationship to the IPU list.

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To Change Between the Legacy Appointments System and the New Multiple User Display Appointments System

- 1) Go to Tools – Options – Appointments. Click on Multiple User Display.
- 2) Click OK.

- 3) Close your patient selector and reopen it.
- 4) Go to the appointments tab. You will now see the multiple user display.
- 5) You will now need to configure the users.

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Configuring the Multiple User Display

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Appointments

To Configure Users

Note: If you want to configure all users at once you must log in as administrator.

- 1) Click on Config – Add/Edit Users.

- 2) Highlight the user on the left. Click on **Display in appointment planner** on the right. You can also select the user group, i.e. GP/Nurse, default room, and default appointment type. For each of these click on the three dots to see choices.

- 3) When you click onto another user, it will prompt you to save changes.

- 4) Then highlight the second user and do the same thing.

- 5) If you wish to change the order in which the users will appear on the planner, highlight a user and click up or down arrow to move the doctor/nurse up or down the list.

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To Configure Users ..continued

6) Advanced settings:

If you wish to allow others to create/modify your appointments, you must click on the “advanced” button (a) and put a check-mark in the “others may create/modify appointments” box.

7) Click on Save & Exit.

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To Configure Planner View

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- 1) Click on Config – Planner View.
- 2) To edit the day start and day end times just click on the down arrows and select new times. You can also edit the default duration of appointments and the display interval of the planner.
- 3) You can change the colour scheme by clicking on any of the colours and selecting a new colour i.e. to change the Planner Background colour, click on the light blue square beside 'Planner Background Items' and a colour chart will come up. Choose your new colour and click ok.
- 4) Click save and exit when finished.
- 5) Close your patient selector and reopen it.

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To Configure Recurring Timeblocks

- 1) Click on Config – Recurring Timeblocks.
- 2) Highlight user and click add.

- 3) Type in time block name and choose day of week and time.

- 4) Click save and exit.

- 5) If you wish to copy the time block, e.g. from Monday to Tuesday, highlight Lunch on the right hand side and click Copy Day.

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To Configure Recurring Time blocks ..continued

- 6) Choose Tuesday from the drop down list and click save.

- 7) If another user has the same lunchtimes Click on Copy to User. Select user from drop down list and click Copy.

8) Click close.

9) Click save.

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10) Close your patient selector and reopen it.

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To Configure Holidays/Leave

- 1) Click on Config – Holidays/Leave
- 2) Click on New
- 3) Select user from drop down list and set start date and end date.

- 4) Click save and exit.
- 5) Close your patient selector and reopen it.

To Convert your Appointments from the Legacy System to Multiple User Display

Please note:

- A. This process can only be done once. When the appointments have been converted they can not be converted to back to the legacy appointments system.**
- B. Any messages in the message panel of the legacy appointments system will not carry over to the new system.**

To convert the appointments:

- 1) Log into HEALTHone as administrator i.e. with username = Admin, password = Admin.
- 2) In the appointment tab go to Config – Convert Legacy Appointments.

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To Convert your Appointments from the Legacy System to Multiple User

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Display ..continued

3) Select user to convert and click convert.

4) Click OK.

5) If there are any conflicting appointments, click on the conflicts tab for more details.

6) Click Exit.

7) Repeat steps 3 – 6 for each user whose appointments you wish to convert..

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Using the Multiple User Display Appointments

To Add a New Appointment

1) Double click on the time slot you wish to add an appointment to. You can also highlight the time slot by clicking with the mouse, then press space bar to



create appointment.

2) Use the patient selector to locate the patient the appointment is for

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To Add a New Appointment ..continued.

3) Edit any details required such as Appointment location and appointment type and duration. If you want to put in a note/comment hit F3 or click on show advanced detail.

4) Click Save and Exit.

To Edit an Appointment

To edit an appointment after it has been made,

- 1) Highlight the appointment slot and press space bar or
- 2) Highlight the appointment slot and right-click, and then choose edit from the menu.
- 3) You can change time, date, doctor, location or appointment type.
- 4) Click save and exit when finished.

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Work-flow

It is important to follow a work-flow procedure in bringing patient through the practice. This is done as follows:

- 1) When making a new appointment, it appears in one colour, with its status set to "confirmed".
- 2) When the patient arrives at the practice, you should set their status to "present / waiting" as follows:
- 3) When the patient is to be seen by the GP/Nurse, they select they patient name and click "View record". You can also double-click on the patients name to view record. The following screen will appear:

4) If you say yes, it will set the status to “in appointment” and also open the patient file. Then when the GP/Nurse closes the patient record, the status will be automatically updated to “complete”.

5) If you say no, it will merely allow you to look at the patient record without changing the status.

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Repeat appointments

You can make a repeat appointment for a patient easily by selecting an existing patient appointment, right-clicking and selecting “copy” – this will copy all the details of the selected appointment into a new appointment – all you need to do is change the date and time. When you are in the appointment editing screen, if you click advanced detail you can view the calendar and select a free time slot.

To View Patient’s Appointment History

- 1) Highlight patient’s appointment in appointment screen.
- 2) Right-click on appointment and click on appointment history.
- 3) A list of all appointments past and future for this patient will appear.

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To Locate Appointments for a Particular Patient

1) Click on button below calendar.



- 2) Type in patients surname as before.
- 3) Double-click on patient name or click View History for Selected.
- 4) Alternatively you can select any appointment for any patient and right click and select Appointment History. This will list all appointments for this patient.

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Messaging Feature

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To Send a Message to Another User

- 1) Click on New.
- 2) Select the recipient from the drop down list.
- 3) Type Message
- 4) If you wish to relate the message to a particular patient file, click *select patient*. This will allow you to choose the patient from the patient selector.
- 5) To send a carbon copy or blind carbon copy to another user, click *advanced detail* then *add cc* or *add bcc* as required.

6) Click Send.

To View Received Messages

1) Click on the drop down arrow beside view and change to received.

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To View Received Messages(cont.)

2) Double click any message to read it.

3) If the message is relating to a patient you can click *view patient* to open the patient's file.

4) There are options to reply, forward or delete the message.

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Correspondence

HEALTH*One*™ has its own text editor which can be used to quickly write

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letters to consultants and archive their replies directly into the patient's file.

In its simplest form the text editor can be used to write free format letters, like any other word processor, and print/save these. However; there is a more powerful aspect to the text editor in that it has a number of pre-set documents, called templates which are used to automatically extract information from a patient's file and merge this into the new document.

HEALTHone™ has a number of templates which are supplied as standard. In time you will be able to create new templates of your own. This document will introduce you only to how they are used.

See also the chapter on **Mail Merge** to see how these templates can be further enhanced

Free Format Letter

To use the text editor to write a free format letter you do not need to have a patient's HCR open.

Creating a New Letter

- 1) Select the menu sequence: **File / New / Document**
 - The text editor window opens with a new blank document.

Speed
Toolbar Formatting Toolbar
Ruler Tab Bar
Insert Cursor (flashing)
Insert Cursor Location
Indicator

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Free Format Letter

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Text Editor Toolbars

In general, if you wish to know what a toolbar button does simply place your mouse on to it – exactly like you would with the HEALTHone™ buttons – and a description of each will appear beneath the mouse cursor.

Speed Toolbar

This toolbar contains buttons which perform common functions and save you time.

Formatting Toolbar

The Format toolbar is used to change the appearance of text. The controls affect two distinct type of text:

The Character Any letter or letters that are currently selected. See next page for text selection techniques.

The Paragraph Any amount of text ending in a RETURN character. (i.e. inserted by pressing the RETURN key).

In the illustration above arrows (with the exception of the zoom button) point to buttons which control the character appearance and braces indicate those that change a paragraph's appearance.

Zoom

Size %

Bold Italic Underline

Style Style Style

Font Size

Selector

Font

Selector

Paragraph Alignment

Controls
Left, Centred, Right, Justified
Paragraph Tab Controls
Left, Right, Decimal, Centre
Quick Text
Line
Use
External
Text Editor
Insert a
Database
Field
Buttons only used for creating
templates
Archive
Document Print
Preview
EMAIL
Document
Import
picture
Import
text
Header/
Footer
Quick Text
Paragraph
Import
scanned
text

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Free Format Letter

Text Editing Techniques

To type text:

Position the insert cursor (flashing line) where the new text is to appear (by clicking the location once with your mouse or by using the four



cursor keys (← →) and type.

Note: The insert cursor can only be positioned where text currently exists. See below to find out how to create blank lines.

To create a Paragraph:

Press the RETURN key. Any amount of text ending in a RETURN character is considered by the text editor as being a paragraph.

To create a blank Line:

Press RETURN without typing anything else. A blank line is simply an empty paragraph.

To create a New Line:

Hold down the SHIFT key and then press RETURN.

Don't confuse this with a blank line. A new line will appear identical to a blank line but is considered by the text editor as being part of the paragraph above it. Any appearance changes to the paragraph above will also be reflected in the new line.

Correcting Mistakes

Small typing errors: Position the insert cursor to the right of the error and press the Backspace key (←)

□ □

□ right most key, top row of keypad) to delete. Re-type correctly.

Large errors: Where deleting each character in turn is not

practical you should first *select* (see *Selecting Text* a little further on) all the text which needs deleting and then press the DELETE key.

Other Mistakes This is where something has happened, possibly unexpectedly. Select the menu sequence **Edit / Undo**. The text editor remembers your last action and reverses it, but be careful, only the last action is remembered, so you must correct the mistake before doing anything else !

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Free Format Letter

Text Editing Techniques

To practice these techniques:

- 1) Select a paragraph in this book and type it. Do not press the **Return** key (even at the end of a line) until the entire paragraph has been entered.
- 2) Press the **Return** key again to create a blank line.
- 3) Type another paragraph.
- 4) Practice the editing techniques outlined above.
- 5) Select the following menu sequence **Edit / Select All**
 - Entire text selected

- 6) Press the **Delete** key
 - Page is blank once again.

- 7) Select the menu sequence: **Edit / Undo**
 - Page re-appears. Text is still selected.

- 8) Press the **Delete** key once again.
 You once again have a clean page.

Selecting Text

This is an important action to master, because you will need this to change the appearance of both characters and paragraphs and also edit text quickly.

To select:

A Character: Place the mouse cursor to the left of the character to be selected, hold down the mouse key and drag the mouse cursor over the character required.
Now release the mouse key.

A Word Place the mouse cursor over the middle of the word required and click twice quickly.
Alternatively, drag the mouse cursor over the entire word as described for character selection.

A Line Move your mouse cursor to the left of the line required until it becomes a right facing arrow. Now drag downwards for one line.

A Paragraph Same as for the line but keep dragging down until the paragraph is selected.

Any Amount Click once to place the insert cursor at the beginning of the selection. Use the scroll bar if necessary to view the end point of the selection.
Hold down SHIFT and click once on the end point.

All Text Select the menu sequence: **Edit / Select All**

Free Format Letter

Changing the Appearance of Text.

The Character: First select the character(s) to be altered, as described on the previous page. Now select the button required on the Formatting Toolbar. Alternatively: Select the menu sequence: **Format / Font** and change the settings as required.

The Paragraph Position the insert cursor anywhere inside the paragraph to altered. Now select the change required on the Formatting Toolbar or, alternatively select the menu sequence: **Format / Paragraph**.

To practice these techniques:

- 1) Select a paragraph in this book and type it. Do not press the **Return** key (even at the end of a line) until the entire paragraph has been entered.
- 2) Practice selecting Characters, Words, Line, Paragraphs and entire text.
- 3) Select a word and experiment with the settings in the: **Format / Font** menu.
- 4) Make sure your insert cursor is positioned inside the paragraph just typed and experiment with the **Format / Paragraph** menu.

Page and Document Settings

In addition to be able to type, edit and change the appearance of text you will also need to control document and page settings.

Set Paper Size: Select the menu sequence **Format / Document** and set paper width and height size in the boxes provided.

Set Margins Select the menu sequence **Format / Document** and set top, bottom, left and right margins in the boxes provided.

Insert a Page

Break Position the insert cursor where the break is required and select the menu sequence **Insert / Page Break**.

Remove a

Page Break Position the insert cursor underneath the page break and press the Backspace key (□

□ □

□ right most key, top row of keypad) key once.

Printing Your Document

To Preview Before Printing:

- 1) Select the menu sequence: **File / Print Preview** or alternatively simply click on the print preview button on the Speed Toolbar.
- 2) Click with the left mouse key to ZOOM IN or right mouse key to ZOOM OUT the preview of the page.

To Print

- 3) Select the menu option: **File / Print**. Select the page range and number of copies required. Select **OK**.

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Free Format Letter

Saving and Archiving Your Document.

There is a difference between saving and archiving.

Saving means to save your work as an individual file on to your computer;

Archiving means to attach the document to an Item in the current transaction of the patient's HCR. So, to archive a document the patient's file must be open and a new transaction created. HEALTHone™ will prompt you for the name of the item in which the document is to be archived, normally this would be the item **archived document**:

See 'Archiving a Consultant's Letter' later in this session for an example of archiving. For now we will simply SAVE this document:

- 1) Select the menu sequence: **File / Save**
- 2) Type in a name for the document
- 3) Click on the **Save** button.

Closing a Document (and the Text Editor)

Now that you have saved the document we can close it. If you choose to close the document and you haven't saved any changes HEALTHone™ will prompt you to do so.

- 4) Select the menu **File / Close**
 - If you have already saved the document it will now close and the text editor will automatically close as well.
 - If you have not saved the document HEALTHone™ prompts :

- 5) Select Yes or No. Cancel brings you back to the document to continue editing.
 - If the document had never been saved before you would now be prompted for a file name and destination directory in which

to save it.

Upon completion the document will close and the text editor will automatically close as well.

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Using Templates

Templates are designed to be used in conjunction with patient data. They provide a quick method of writing everyday letters in the practice.

Once a letter has been created using a template it can be edited and enhanced by using the same techniques employed in writing a free format letter described earlier.

As an example we will send Sarah Tennant to see a consultant with a referral letter

– generated by HEALTHone™.

Next, we will archive the consultants reply into her file.

Opening a Health Care Record

1) If the Patient Selector window is not already open select the menu **File / Open / HCR**.

Patient selector window is now open.

2) Type: **Te** in the surname filter

3) Select **Sarah Tennant** in the patient list.

4) Click on the **Select** button.

The Health Care Record for Sarah Tennant opens.

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Creating a New Transaction

We wish to record the fact that she has been referred to hospital.

- 1) Click once on the **Create Medical Transaction** button on the Transaction Panel Toolbar.
 - The Transaction Properties dialogue box appears.

Transaction Attributes

- 2) Complete the Transaction Properties dialogue box by ensuring that the attribute values are set as follows:

Type Contact
Name Consultation
Responsible Your name
Date of event Current date and time
Speciality general practice
Legal Structure As is
Problem None

- 3) Click on the **OK** button.
 - New transaction is completed and appears at the end of Sarah Tennant's medical chapter.

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Using Templates

Inserting the Referral Item

- 1) Click once on the **ItemSelector** button on the Item Panel Toolbar.
 - The Item Selector window opens.
- 2) Type: **Ref** in the Item Find box.
 - Item list reduces to those that begin with 'Ref'.



3) Select the item: **referral** Click on **OK**

The Item 'Referral:' is inserted into the new transaction and its associated list box opens.

4) Ensure the term **Hospital** is selected. Click on the **Insert** button. Select any hospital from the sub list. Click the **Insert** button once more.

The terms 'Hospital' and its name are entered as a response.

The Referral Item window is still open.

5) Click once on the Associated List button (to the right of the blue book)

Associated list re-appears.

6) In the find box type: **R** Select the term **respiratory medicine** in the list. Click on the **Insert** button. Select **respiratory function tests** from the sub list. Click the **Insert** button once more. Click **Close** to close the associated list box

7) Click **OK** to close the **referral:** item edit box.

8) Save and validate this transaction by click on the diskette button on the HEALTHOne™ standard toolbar.

Creating the Referral Letter

Now that her referral to the consultant has been recorded we now need to give her a letter. For this we need to select the transaction which best describes her complaint. Selecting this will make it the *current transaction* and the template will pick up its details and merge them into the referral letter that it creates.

The transaction which describes her complaint best is the second one in the medical section (the first transaction is her basic medical information).

1) Select the transaction immediately beneath the basic medical information one by clicking on it once in the Transaction Overview panel.

The selected transaction is now considered as the 'current transaction'

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Using Templates

Creating the Referral Letter

2) Now select the menu sequence: **Tools / Run template**

A box of templates appears.

3) Select the template: **quicklet.cvs** and click on the OPEN button.

The quicklet template runs and a new letter is created and displayed in the text editor window. See Fig.1

- 4) Use the scroll bars to view the full contents of the letter.
- 5) Use the editing techniques to enhance the appearance of the letter and alter its contents.

Printing Your Document

To Preview Before Printing:

- 1) Select the menu sequence: **File / Print Preview** or alternatively simply click on the print preview button on the Speed Toolbar.
- 2) Click with the left mouse key to ZOOM IN or right mouse key to ZOOM OUT the preview of the page.

To Print

- 3) Select the menu option: **File / Print**. Select the page range and number of copies required. Select **OK**.

Fig.1 Text Editor Window

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Using Templates

Saving the Document.

- 1) Select the menu sequence: **File / Save**
- 2) Type in a name for the document
- 3) Click on the **Save** button.

Closing a Document (and the Text Editor)

- 4) Select the menu **File / Close**
 - If you have already saved the document it will now close and the text editor will automatically close as well.
 - If you have not saved the document HEALTHone™ prompts :
 -

- 5) Choose your option from this list and click Yes.
 - If you choose 'In HCR as multimedia object', it will save the document into the patients file.
 - If you choose 'In HCR as free text', it will save the text of the letter into the patient's file as free text.
 - If you choose 'Save as external file' it will save the document as a file on your computer.
 - Upon completion the document will close and the text editor will automatically close as well.

Note: If you click No, the document won't save, and if you click Cancel it will bring you back into the letter to continue editing.

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Archiving a Consultant's Letter

OK Now lets assume that she has seen the consultant and you have received a written reply. To record this we once again create a new transaction:

Creating a New Transaction

We wish to record the contents of her letter in her file.

1) Click once on the **Create Medical Transaction** button on the Transaction Panel Toolbar.

The Transaction Properties dialogue box appears.

Transaction Attributes

2) Complete the Transaction Properties dialogue box by ensuring that the attribute values are set as follows:

Type Contact

Name EXPERTS REPORT

Responsible Your name

Date of event Current date and time

Speciality respiratory medicine

Legal Structure As is

Problem None

3) Click on the **OK** button.

New transaction is completed and appears at the end of Sarah Tennant's medical chapter.

Create a New Document

1) Select the menu sequence: **File / New / Document**

A new document opens

2) Type:

Mrs Sarah Tennant

Seen by Mr. H Richards – 17th October 1998-10-29

Upon examination I have found severe throat pharyngitis however, I feel that with intensive antibiotics this will clear.

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Archiving a Consultant's Letter

1) Click once on the **Archive** button on the Speed Toolbar.

Prompt to Archive now appears.

2) Select **In HCR as free text**

It will automatically save it into HEALTHone™ under item:

Report and close the text editor.

Finishing this Consultation

If all has gone well Sarah Tennant's current transaction should now appear as

illustrated below in Fig.2:



Save and Validate this transaction by selecting **Save** from the **File** menu.
Close Sarah Tennant's file
Exit **HEALTHone™**

Fig.2 Sarah Tenant's Current Transaction
Archived document completed.

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Scanning pictures in HEALTHone™

To scan within HEALTHone™ we use a program called Irfanview. This is available on the HEALTHone™ installation CD.

To Install Irfanview:



Insert HEALTHone™ installation CD. It will open an installation screen automatically. Click on Cancel.

Open My Computer. Right click on the CDROM drive and left click on explore.

Open the directory called Irfanview. Double-click on iview392.exe to install.

* Please note the setup screen contains an option to install eBay shortcuts and toolbar. This is not necessary for the installation of Irfanview so you may un-tick these if you wish.

After Installation of Irfanview you should double Click on the file called Irfan_ini.exe, also found in the Irfanview directory on the CD.

After installing Irfanview, you must link Irfanview to your scanner driver. To do this, open Irfanview, click on file - "select twain source" and choose from the proposed list. (If there is nothing to select, your scanner driver is not installed and you should contact the providers of the scanner).

In HCR as a multi-media object

Selecting to archive a document as a multi-media object will also prompt for an item to save it in (use **archived document**) – however, an association is made with an application program (a word processor for example). The icon for the associated application program is used to represent the document in the patient's file. Below is an example of how a document archived as a multi-media object associated with the Microsoft Word application will appear:

Double clicking on this icon will launch the associated application program and display the archived document.

The application program that the document will be associated with is set via the **Tools / Options / Multimedia association** menu.

Save as an external file

Selecting to archive a document as an external file will prompt for a file name and destination directory. This document is NOT linked to the patient file.

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Scanning pictures in HEALTHone™

Then go in to HEALTHone™.

1. Go to Tools –options – scanning.



2. External scanning software should point to "c:\Program Files\IrfanView\i_view32.exe"

3. Item used to store scanned images = "archived document" or "report" or whatever you wish.

Now HEALTHone™ is set up to scan pictures.

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Scanning pictures in HEALTHone™

To scan a single page:

1. In HEALTHone™ the button for "insert multimedia object" (camera),

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has a down arrow next to it containing four options. Choose the option - Picture from scanner.

3. Irfanview will open automatically. Click on File - Batch scanning.

3. Don't change any options in here. Just click OK.

4. Your picture should now scan. When it is completed it will show in Irfanview.

5. Close Irfanview. The picture will have saved into HEALTHone™.

6. To add a comment, go to Insert item, choose comment and type in your comment.

7. Save and validate the transaction.

To scan multiple pages:

A. Repeat steps 1 – 4 as above.

B. Instead of closing Irfanview, click on File - Batch scanning again.

C. Click OK.

D. Repeat for each page you want to scan

E. When completed close Irfanview.

F. The pages will have saved into HEALTHone™ as one file.

G. To add a comment, go to Insert item, choose comment and type in

your
comment.

H. Save and validate the transaction.

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Own Notes

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Laboratory Data Messaging

Laboratory results are recorded in the patient's file by:

- Manually entering the data
- Automatically receiving the data via the Data Exchange Module

Manually Entering Laboratory Results

- 1) Create a new medical transaction. Leave the transaction Type as **contact** but change the Name to **Lab**.
- 2) Click on **OK** to create the transaction.
- 3) Insert the sequence **haemoglobin** or **biochemistry** as required and record the results.

Automatically via the Data Exchange Module

Laboratory Surgery

Via EMAIL, diskette or
electronic transfer

Via HEALTHone™
Data Exchange Receive
module

Data Exchange Module



INBOX

Definition Files

Phase Three: INBOX to Patient File:

Controls whether data is automatically or manually integrated into patient's file.

HEALTHone™

Patient File

Definition

Files

Phase

One

Phase

Two

Phase

Three

Automatically Importing Lab' Results

Definition Files

Phase Two: Data to INBOX:

Describes where the lab data is located on the receiving computer and how to translate it into **HEALTHone** compliant information.

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Automatically via the Data Exchange Module

Figure 4-1 illustrates the process of transferring data from a laboratory to the patient's file via HEALTHone™ 's Data Exchange Module (DXM).

There are three phases in this process:

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- Collection of data from the laboratory
- Transfer the data into the Data Exchange Module **INBOX**.
- Transfer the data from the **INBOX** to the patient's file.

Each laboratory has a *Definition File* created for it in the DXM. This definition file defines:

- The method of data collection, i.e. Diskette, Email - other.
- Where the data is located on the receiving computer.
- Controls how it is converted into a format that HEALTHOne™ can understand.
- Controls how the DXM transfers the data into the patient's file.

Phase One - Collection of Data from a Laboratory

This could be in the form of a diskette posted from the laboratory, or, more commonly via EMAIL to the practice or some other form of electronic data transfer.

Consult the laboratory to determine which method is used.

Regardless of the method used the data will be in a folder/Email Inbox on the receiving computer once phase one is completed.

Phase Two - Transfer the Data into the Data Exchange Module INBOX

- 1) Click on the Data Exchange Module **Receive** button on the HEALTHOne™ toolbar. (Illustrated opposite)
- The laboratory definition files are displayed.

2) Select the definition that represents the laboratory that the data is being imported from. Click on the **Execute** button.

If the definition file option to 'display a list before importing' has been set an additional dialogue box now appears (see *Creating a Definition File* later in this section) Select the definition of the laboratory being imported from here and click the **Execute** button.

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Phase Two - Transfer the Data into the Data Exchange Module INBOX

3) If the **Select files to integrate** box appeared select the files to import by

ensuring there is a tick mark against them in the **selected** box. Click **OK**

The laboratory data is moved into the data Exchange Module Inbox. A results window appears to indicate how many errors were encountered.

Phase Three - Transfer the Data from the INBOX to the Patient's File

We now open the Data Exchange Module and validate the imported data and resolve any errors that may have occurred.

1) The Data Exchange Module (**DXM**) can be opened at anytime by clicking on its button on the **HEALTHone™** toolbar. (Illustrated opposite). However, if you completed phase two by clicking on the **Details** button the **DXM** would have opened automatically.

DXM is now open.

Automatic Merging

If the laboratory definition file had been configured to automatically merge results into the patient files (see *Creating a Definition File* later in this section) this would have occurred and only errors would be left to be resolved. Managing

errors are described later, for now, assume all went well and the data has been successfully merged. A screen similar to Fig. 4-2 will appear.

[Click here to return to the Receive Module to collect more data.](#)

[Click here to open the Data Exchange Module](#)

INBOX.

Transaction

Locator

INBOX / OUTBOX

Selector **DXM** menu View transactions by their status selector.

Merged status indicates a successful merging into the patient's file

DXM Module (INBOX)

Transaction

Selector
Box

4-2

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Automatically via the Data Exchange Module

Phase Three - Transfer the Data from the INBOX to the Patient's File

Manual Merging

Many practices would validate the results before merging them, in which case all

results would now be **waiting** to be validated in the Data Exchange Module Inbox.

See Fig. 4-3

Viewing & Validating a Waiting Transaction

1) Click once on the transaction selector box to select the transaction to be validated. See Fig. 4-2

2) Click on the DXM menu **View** button (Illustrated opposite). See Fig. 4-2

The transaction opens to be viewed.

3) Click on the **Validate** button and click **OK** when prompted to validate the transaction. Click **OK** for second prompt. Close the

transaction view window by clicking on the **X** in the top right hand corner.

DXM module once again in view and the selected transaction Action column indicates that it has been validated. See Fig 4-4

Waiting status indicates that user intervention is required before merging into the patient's file

DXM Module (INBOX)

Click here to validate this transaction.

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Automatically via the Data Exchange Module

Phase Three - Transfer the Data from the INBOX to the Patient's File

Manual Merging

Viewing & Validating a Waiting Transaction

If the selected transaction had been viewed but not validated the Action icon would indicate that it had been viewed.

Merging Waiting Transactions

- 1) Select the transactions to be merged. Use **Ctrl + Click** to select more than one if required.
- 2) Click on the DXM menu **Merge** button (Illustrated opposite)
 - Provided there are no errors the transaction(s) is(are) merged into the patient file(s).

This completes the technique of manually merging transactions.

Managing DXM Errors

If a patient file cannot be located for an imported transaction the DXM module can be set to manage this in one of two ways:

- Automatically create a new file for the patient
- Set the transaction status to 'Not Found' and await user intervention to resolve the problem

The choice of action is controlled via the lab Definition file. See *Creating a Definition File* later in this section.

Note: If the definition file had been set to always validate transactions then all transactions, including the *not found*, are set to an initial status of **waiting**. Only when an attempt is made to integrate the transaction will a dialogue box appear requesting your choice of action:

Validated icon

Viewed icon

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Managing DXM Errors

Automatically Create a New Patient File

Initially this may seem the most sensible thing to do, however, labs do make mistakes, and the problem could be that the patient's name has simply been spelt incorrectly.

Mark the Transaction as 'Not Found'

With this setting the transaction will appear in the DXM INBOX as 'Not Found'.

Now there are two possibilities:

The patient genuinely does not exist

The patient does exist but their name has been spelt in-correctly

In all cases

1) Select the transaction and then click on the **Correct** DXM menu button illustrated opposite.

The DXM Correct Identifiers window appears. In it is listed all

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patient's that nearly match the not found one:

If the Patient Does Not Exist

- 2) Click on the Correct Identifiers window **new** button.
 - The patient file is created.
- 3) A prompt appears to confirm creation. Click **OK**. Now go to step 6)

If the Patient Does Exist

- 2) In the Correct Identifiers window click on the patient file that the transaction is to be integrated into and click the **Select** button.
 - 3) A prompt appears to confirm integration. Click **OK**
 - 4) A notice appears to inform you it has been done. Click **OK**
- Not found
patient.

Patient's that
almost match,
i.e. with the
same surname



but different first name.

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Managing DXM Errors

If the Patient does exist ..continued.

5) Two things now occur:

- The transaction is integrated into the selected patient's file.
- The name error is remembered for this lab and will be automatically corrected next time if set to do so in the definition file advanced options. (See HCR Identifiers below)

6) Click the Correct Identifiers window **Cancel** button.

- Window closes and DXM window back in view.

7) If you are ready to quit the DXM module click on the cross in the upper right hand corner of the DXM window.

HCR Identifiers

Whenever a lab result is *not found* and later merged into an existing patient's file HEALTHone™ creates an **HCR identifier** to record the match between the name used by the lab and the name of the patient merged too. If the same lab returns more results for the *not found* patient HEALTHone™ will automatically merge them into the correct patient's file.

The process of creating HCR identifiers is automatic, however, there may be times when you need to delete an identifier if, for example, you accidentally merged the *not found* data with the wrong patient.

To do this:

1) Click on the *display HCR identifier mapping*DXM menu button illustrated opposite.

HCR mapping window appears.

2) Select the HCR mappings to be deleted and click on the **Delete** button.

3) When completed click the **Close** button to return to the DXM window.

Name used by Lab'
too

Click this column
to select HCR
Mapping(s) to be
deleted and click
the **Delete** button

Actual patient to be merged

Type in the filter boxes to locate the patient mapping you require.



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Tidying the INBOX

All transactions imported into HEALTHone™ arrive in the DXM INBOX. From time to time it will be necessary to locate specific transactions and perform *housekeeping* on the INBOX.

Locate Specific Transactions

- 1) Open the DXM module
 - DXM window opens.

2) Use any of the techniques above to locate the transaction(s) required.

Selecting Transactions

1) Once the transaction(s) required have been located they can be selected individually by clicking once on the transaction selector column to the left of the transaction.

- 2) Hold down **Ctrl** and **Click** the selector column to select multiple transactions.
- 3) Drag select the selector column to select contiguous transactions.

Delete Transactions

- 1) Select the transactions to be deleted
- 2) Click on the **Delete DXM** menu button illustrated opposite.
- 3) Tick the box to permanently delete the transaction, or leave un-ticked to only mark as deleted - later re-restorable if required. Click **OK**

Select transactions by status:

All Items

Waiting

Errors

Deleted

Select by date range.

Click the **Period** box first

then select date range

Select by name of file used to transmit the data.

Select by

name of Dr.

who requested

the data

Select by

definition file
name used
to receive
the data.
Select by name of
person who
imported the data.
Select by
Patient
name
Transaction
Selector
Column

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Creating a Definition File

To create a DXM definition file:

1) Click on the Data Exchange Module Receive Box button on the HEALTHone™ toolbar.

The definitions window appears with the current definitions listed.

2) Click on the **New** button.

The definition file wizard starts and screen one appears:

3) Click **Next**

DXM Definition File Wizard - Screen 1

Type the name of the laboratory here.

Select the collection service type here,



i.e. Diskette, E-Mail, etc.

Select here the laboratory you are collecting from. Contact **HEALTH one** if it is not in this list.

Enter here the location on the receiving computer where the collected data can be found.

Type here the mask which will filter out just data sent from this laboratory. The laboratory will provide this information.

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Creating a Definition File

To create a DXM definition file:

4) Click **Next**

5) Click **Next**

There is now a further patient filtering screen which can be by-passed.

6) Click **Next**

DXM Definition File Wizard - Screen 2

Options

Choose here what is to be done with the original lab information once it has have been imported.

Choose here whether the imported information should be integrated immediately into the patient's file or left in the Data Exchange Inbox awaiting validation by the GP before integration.

Choose here how un-matched patient's data should be managed. See *managing DXM Errors* earlier in this section.

DXM Definition File Wizard - Screen 3

Advanced Options

There are a number of options on this screen, two of which are described here.

If a patient was marked as *not found* and later matched to an existing patient. Future mis-

matches for this patient can be automatically corrected if this option is ticked.

If this definition is collecting data via email the email subject content should be specified here. Only matching emails with this subject will be extracted from the email in-box

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Creating a Definition File

To create a DXM definition file:

7) Click Finish

The wizard closes and the new definition appears in the list.

Lab Display Styles

These display styles are optional and were designed specifically for the HSE South

East (display original lab codes), and Health link (display fixed width font). They are

both accessed by clicking on the main menu :

Tools

Options

data Exchange module

We have two new options here:

Lab transactions now can display the lab code and lab description by option. The HEALTHone™ code remains mapped in the DXM mapping if there is a mapping.

Below is a screen shot of a lab result as seen in a patients record in HEALTHone™:

The display opposite is seen if you have ticked the « display original codes » button above. The text displayed is taken directly from the lab message. You can at any time switch back to « normal display », below.

Schedule

If this definition is to run on a regular basis it can be set to automatically occur according to the schedule defined on this screen.

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Network Configuration Sharing

Introduction

A *configuration* is a collection of data such as sequences, aggregates, templates and general user settings. Each installation of HEALTHone™ has its own *configuration set*, which equates therefore on a network to each user having their own set. While this allows for individual preferences many users would like ONE common configuration set for all users.

There are two ways in which HEALTHone™ allows this common network set to be managed:

When logging into HEALTHone™ the network configuration set is selected.

Note: Once a configuration set has been selected it will remain the active set for future logons until changed.

Each user has their own set and synchronises with the network set when required. Typically all changes are made to the network configuration set and all users synchronise to this when required.

Normally one or other of the above methods is chosen but not both.

Method One – Selecting a Configuration Set at Logon.

Technique

1) Start *HEALTHone*™ and when the logon screen opens click on the *Advanced* tick box.

A configuration tab appears.

2) Click on the *Configuration* tab to bring it forward.

The configuration tab displays the location of the local configuration set.

3) Click on the **Add** button.

4) In the *Browse for Folder* window locate the network configuration set (usually

on the server *...\Honewin\Config*). Click **OK**.

The server configuration location is added to the configuration tab.

5) Select the server configuration and click on **Select**. Click on the *Sources* tab

and logon in the usual way.

Note: The *Configuration* tab will now remain as a feature of the logon screen. In

the event of the network failing, or a laptop not connected to the network, the

LOCAL configuration can be selected when required.

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Network Configuration Sharing

Method Two – Synchronising Configurations

Technique

- 1) Start HEALTHone™
- 2) Click on the *Synchronise Configurations* button on the standard toolbar.
Illustrated opposite.
- 3) The *Define the synchronisation* window appears. Click the **New** button.

- 4) Type a description for the destination source being synchronised with in the *Key* box.
- 5) Click on the browse button to the right of the *Destination config directory* box.

The Browse for Folder window appears.

6) In the *Browse for Folder* window locate the network configuration set (usually on the server ...\\Honewin\Config). Click **OK**.

The config and drug directory boxes are completed.

7) To synchronise, now or in the future, ensure the *key* required is selected and click on **Synchronise** button.

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Synchronising Sources

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Introduction

A source contains a complete set of information regarding a practice, including patient files, billing information, appointment information and user information. Many practices will have secondary sources such as a laptop source, RIP Source and possibly a backup source somewhere on the network. These secondary sources need to be kept in-sync with the master source on the server.

How a source is created is documented in the *Installation Guide* and is normally performed at installation time. There are two types of source: *Master* and *Slave* and dependent upon the type(s) being synchronised various options will/will not be available. Regardless of source type the procedure is quite straightforward.

Synchronisation Technique

1) Start **HEALTHone™** and login to ONE OF THE SOURCES TO BE SYNCHRONISED.

2) Click on the *Synchronise Sources* button on the Standard Toolbar. Illustrated opposite.

The Synchronisation Wizard start.

There now follows a series of screens the first of which is just an opening screen and can be by-passed in the future by ticking the *Do not display...box*

3) Click **Next**.

You can now opt to synchronise just those *selected in the patient selector*,

ideal for synchronising one or two patients, or archiving deceased patients

– or - scan *all patients using common options* for a certain match, i.e. *all patients changed since....*

4) Choose the type of selection method. Click **Next**

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Synchronisation Technique

This screen is where the destination source is selected.

6) Click on the **Select Source** button.

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and login to the source to be synchronised with.

Once the source has been selected the direct of synchronisation can be chosen.

Typically in the case of a laptop the direction of synchronisation when *leaving* the practice would be **Server to Laptop** and when *returning* **Laptop to Server**. There is also an option to synchronise in both directions

– , naturally, this would take longer to perform. The option to *Compact* a source before synchronisation compresses the source and reduces its size.

We recommend that this option be set.

6) Choose the direction of transfer and compaction required. Click **Next**.

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Synchronisation Technique

The next screen controls *what* is to be synchronised. The options available here will vary dependent upon the types, *slave* or *Master*, of sources being synchronised. The screen below is configured to just synchronise patient files (HCR's).

Options

- a) *Synchronise HCR's Patient Files*
- b) *Don't /Do synchronise deleted..* Patient's deleted in one source can optionally be deleted in the destination source.
- c) *Advanced (Archive..)* This option is for archiving files, for example if deceased patient's are being synchronised to an RIP source. Options control what will happen to the files in the original once synchronised to the destination.

*Don't delete...*Files left intact.

Delete HCR...Moves patient files to the deleted patient selector screen.

Delete permanently...Permanently delete the files in the original source.

d) *Audit trail* Only applicable for Slave/Master synchronisations – synchronises the audit log.

e) *User information* Only applicable for Slave/Master synchronisations –Changes in Master Source users – i.e. new users, password changes, rights changes etc.

f) *Billing* Billing information.

g) *Appointments* Appointment information.

7) Choose what is to be synchronised. Click **Next** or **Finished**

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Synchronisation Technique

The screens that appear next are dependent upon the *What* is being synchronised as per the previous screen.

HCR Synchronisation

8) Choose HCR settings. Click **Next** or **Finished**

Billing Synchronisation

9) Choose BILLING settings. Click **Next** or **Finished Options**

Select to update patient files that have changed since the last update ...and enter a date and time.. or leave unchecked to synchronise all patients.

To synchronise for just a particular doctor/user select here

and choose the user here

Options

Delete records..... Destination billing records deleted if they have been deleted in the original source

Options

Select to update billing information changed since the last update ...and

enter a date and time.

To synchronise for just a particular doctor/user select here.

and choose the user here

If *non existing patient* box is ticked billing information for a missing patient in the destination source will cause the entire HCR for that patient to be synchronised.

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Synchronisation Technique

Appointments Synchronisation

Note: This applies to legacy appointments only.

In order to synchronise appointments, you must be logged into HEALTHone™ as the user whose appointments you wish to synchronise.

9) Choose APPOINTMENT settings. Click **Next** or **Finished**

All the settings have now been specified and the final screen will appear to confirm.

10) Click **Finish** to synchronise or **Cancel** to abandon.

Options

Select to update
appointment
information changed
since the last
update ...and enter
a date and time.

To synchronise for
just a particular
doctor/user select
here.

and choose the user
here

If *non existing
patient* box is ticked
appointment
information for a
missing patient in
the destination
source will cause
the entire HCR for
that patient to be

synchronised.

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5.1 Problem Orientated Medical Records

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Keeping Problem Orientated Medical Records

HEALTHone™ has a feature called **Problem Orientated Medical Records (POMR)** which provides the ability to link transactions to a problem. Once linked in this way the physician can firstly, see at a glance what the patient's primary problems are, and additionally elect to view only those transactions that relate to a particular problem.

Problems appear in the **Problems Tab** of the *Patient Information Panel*. This tab has two buttons – one to display the active problems and the other to display the historical ones.

POMR is an extension to the transaction filtering method mentioned in the *Getting Started* section. There it was described how to filter the *Transaction Panel* to view just lab results, experts reports etc. Once POMR is implemented, it is possible to view lab results that just relate to a particular problem.

The process of using the POMR feature is as follows:

- Declare a problem
- Link transactions to a problem
- View transactions relating to a specific problem
- Change the status of a problem between active and inactive

Displaying / Hiding the Problem Tab

The Problem Tab is displayed or hidden in the *Patient Information Panel* by selecting the menu option **View / Problem**

Declaring a Problem



Problems are declared by inserting the item **problem:** into the patient's file. This could be inserted into any transaction, however; we suggest that it be inserted into the Basic Medical Information page – i.e. the first page in the medical chapter. The reason for this is that it provides a consistent method/location for recording problems and will make them easier to locate when updating is required.

The standard process of creating a new patients file is to create a Basic Medical Information transaction as the first transaction in the Medical Chapter – this is done using the Sequence **Basic medical information** – this sequence includes the item **problem:**.

Technique

- 1) Open the patient's file and select the *Basic Medical Information* transaction – first one in the medical chapter.
- 2) If the item **problem:** exists already select it and press **Return**. Go to step 6)

*Create the item **problem:***

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5.1 Problem Orientated Medical Records

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Declaring a Problem ..continued

- 3) Select the last item (do not open it) – this is done to ensure that the **problem:**

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item that is about to be inserted appears underneath the current items.

4) Click on the *Insert Item* button on the Item Panel Toolbar – illustrated opposite.

The Item Selector opens

5) Type: **prob** into the Find box and select the item **problem** in the list. Click **OK**

The problem item is inserted into the Basic Medical Information page and automatically opens; displaying it's associated list.

6) Select the problem required in the associated list, or alternatively close the list

and type the problem yourself – we would recommend that the terms dictionary

(blue book button) is used to ensure that the problem is correctly entered

–

rather than just type it.

7) The date the problem started/ended now needs to be recorded. If the Item

attributes are not in view click on the button illustrated to view them now.

In the **fig. 3-1** below *hypertension* is being used as an example problem and the item attributes are in view:

3-1

Enter the date the
problem started here

When the problem ends,
tick this box and
complete the *End date*.
This will cause the
problem to move from
the *Active* to the *History*
view of the *Problem Tab*.

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Declaring a Problem ..continued

8) If you are declaring a new problem enter the problem *Start date* no need to type the // marks.
Do not confuse the *Date of event* date with the *Start date*. The *Date of event* date is the date on which the **problem:** item was inserted into the file (usually today's date) and the *Start date* is the date the problem started – this could be some years earlier.

9) Save and validate the Basic Medical Information transaction.

The problem now appears in the active problem window of the Problem Panel.

Linking a Transaction to a Problem

A problem must first be declared as described above before it can be linked to a transaction.

Linking a New Transaction

Whenever you insert a new medical transaction into a patient's file HEALTHOne™ displays its properties window. *Problem* is one of the attributes in the transaction properties window and all the declared problems for the current patient are displayed there. Fig. 3-2 shows how the properties window may appear for a patient that has a number of problems declared:

- 1) Click on the box opposite the problem to be linked to place a tick inside it.
- 2) Complete the rest of the transaction properties and click **OK**.

3-2

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Linking an Existing Transaction

To link a previously created transaction to a problem you need to view its attributes

by opening its properties window. To do that:

- 1) Open the patient's file and click once on the transaction in the Transaction Panel to select it.
- 2) Click on the attributes button on the Transaction Panel Toolbar.

The properties window now appears

3) Click on the box opposite the problem to be linked to place a tick inside it.

4) Close the properties window and save and validate the transaction.

Viewing a Transaction Related to a Problem

1) Click once on the required problem in the Problem Tab.

2) Click once on the *Transaction Panel* to make it active. Hold down the **Ctrl** key and press **E**

The Transaction Panel now only displays the transaction related to the selected problem.

3) You can switch problems while you are in problem view by clicking on a different one in the Problem Tab.

The Transaction Panel now only displays the

transaction related to the newly selected problem.
4) To return to normal view Hold down the **Ctrl** key and press **E** once again.

Transaction attributes button

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Viewing a Transaction Related to a Problem ..continued

There is an alternative way to switch between problem view and normal view:

- 1) Click once on the required problem in the Problem Tab.
- 2) **Right** click the mouse anywhere in the Transaction Panel and select **Filtered on problems** in the pop up menu that appears.
 - The Transaction Panel now only displays the transaction related to the selected problem.
- 3) To return to normal view repeat step 2) above.

Changing the Status of a Problem

A problem can have one of two states: Active or Inactive. This is controlled by the *End date* check box in the **problem:** items attributes. Refer back to fig.

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3-1.

To Make a Problem Inactive

- 1) Open the patient's file and click once on the transaction that contains the **problem:** item. If you took our advice this will be the Basic Medical Information transaction.
 - 2) Click once to select the **problem:** item. Press **Return** to open the item.
 - 3) Now check the *End date* check box and complete the end date.
 - 4) Click **OK** to close the item window. Save and validate the transaction.
- Problem now appears in the History view of the Problem Tab.
- To Make an Inactive Problem Active

- 1) Follow steps 1) and 2) above, now uncheck the *End date*, follow step 4)

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5.1 **Billing**

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Billing Concepts

The Billing feature of HEALTHone™ allows charges for services/products in the practice to be levied against patients and payments recorded. Patient Invoices and receipts can be printed along with reports which reflect the current state of the practice accounts.

Acts

HEALTHone™ considers each individual charge in a practice as a billable **act**. When a patient receives medical services and/or products these are charged by inserting the relevant **act**, with a record of its cost, payment and receipt status, into the patients file. In cases where an individual service involves several charges a **calling act** is created.

Invoices and Receipts & Payments

Invoices can be produced for one, some or all outstanding charges for a patient. When a

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payment is received the 'Receipt' button activates on the Billing Panel Toolbar enabling a receipt to be issued if required.

Reports

The population analysis has a number of reports under the *billing* heading of the Database Analyses. These produce figures in detailed and summary form on a patient, doctor or debtor basis.

Family Billing

The easiest way to bill a family is to post sibling and spouse charges to the head of family patient account - entering a relevant comment describing the charge reason.

Debtors

The Debtors function is designed as an enhancement to the reporting system allowing individual patient charges to be assigned to a third party - such as a health insurance company or individual company for occupational health.

The Billing Panel

Acts are billed and payments recorded in the Billing Panel. This panel occupies the same place on the screen as the Item Panel. Switching between them is a simple process of selecting the relevant tab.

Scope of this Document



This document describes the technique of implementing the Billing system on an individual patient basis using single charge **acts** and producing invoices, receipts and reports for same.

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5.1 Billing

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Billing Panel Tab Outstanding balance
value for this patient

Creating Billing Acts

The steps involved in implementing and using the Billing feature are:

- Create / Maintain the billable **acts**
- Charge **acts** to a patients account - issue invoice/receipt
- Record payment and issue a receipt
- Print Billing Reports

Creating an Act

The first step in implementing the billing facility of HEALTHone™ is to create the various charges that apply within the practice - each chargeable item/service is considered as an **act**.

The approach to this is:

- List the individual billable items/services that are charged in the practice.
- Create an **act** for the individual charges.

Technique - To create an act

- 1) Open any patients file. (The Billing feature is accessed from within a patient's file.)
- 2) Click on the **Billing Panel** tab, above the Item Panel, to reveal the Billing Panel. There may or may not be an outstanding balance value displayed - dependent upon the billing options settings. See *Billing Options* later in this techniques section.

- The Billing Panel now appears. See below

3-3

Insert an act	Delete an act	Print Receipt	Print Invoice	Act Editor	Debtors Editor	Filter Selector	Active Filter Description
-------------------------	-------------------------	------------------	------------------	---------------	-------------------	--------------------	------------------------------

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5.1 Billing

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Creating an Act

3) Click on the **Act Editor** button on the Billing Panel Toolbar. See fig. 3-3 above.

Act Editor window appears.

The Act Editor and its acts are available to all patients.

4) Select the menu **File / New Cost Item**, or press **Ins** key, or click on the **Create new cost item** button on the Act Editor toolbar.

A new Act appears in the Act Panel and prompts for a description.

5) Type the *Description* of the act. Enter the *Cost* (charge) for the act. If the *Doctor price* for the act is different enter it in the *Doctor price*. If the *Doctor price* is left blank the *Cost* price will apply. Leave the *Active* box checked. If billing is being synchronised between different sources, i.e. server and laptop, leave the *To synchronise* box checked.

6) Click once on the Edit/Select button to the left of the new act. Click **OK** to save changes when prompted. Repeat 4) - 6) to create remaining charges.
Select then menu **File / Close** to close the Act Editor window.

Create a new item (act) Save current **actact** Delete current **act** Create a calling **act** Create a called **act** Delete a calling **act** Delete a called **act**

Acts Panel

Calling Acts

Panel Called Acts Panel

Edit / Select
Button

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5.1 Billing

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Setting the Default Act

The *Default Act* automatically appears whenever a new charge is inserted into a patient's file. The ideal choice would be the most common type of act, for example *consultation*.

The default act can be overwritten with any other when it is not correct. This is to save administration time.

- 1) Click on the **Act Editor** button on the Billing Panel Toolbar. See fig. 3-3 above
- 2) In the Act Panel select the Act to be set as the default by clicking once on its Edit/Select button. Now select the menu **Option / Default act**.
 - The selected act now appears in bold in the Act Panel.

Amending Acts

From time to time it may be necessary to amend the details of an act, for example when costs get reviewed.

- 1) Click on the **Act Editor** button on the Billing Panel Toolbar.
 - Act Editor window appears.

- 2) Locate the **act** to be edited - if there are many acts use the search box: type sufficient text of the **act** description to find the one you require.
 - List of acts synchronises with the text typed in the Search box.
- 3) Amend the **act** details as required.
- 4) Click once on the Edit/Select button to the left of the new act. Click **OK** to save changes when prompted.
- 5) Select the menu **File / Close** to close the Act Editor window.

Charging Acts to a Patient's Account

- 1) Open the patients file.
- 2) Click on the **Billing Panel** tab, above the Item Panel, to reveal the Billing Panel.
 - The Billing Panel now appears. See fig. 3-3
- 3) Click on the **Insert Act** button or press the **Insert** key.
 - A new act appears in the Billing Panel. If you had set a default act (see above) its description and charge are automatically entered. See fig 3-4 below

3-4

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Charging Acts to a Patient's Account

4) If the default **act** is the one you require - press the **Right Arrow** cursor key to

move to the next box of the **act** and alter/amend as required.

5) If the default act is not required press the backspace key to delete its description. Now type the description of the **act** you do require, or use the **Up**

and **Down Arrow** cursor keys to sequentially display all the available acts.

When the **act** required is located press the **Right Arrow** cursor key to move

to the next box of the **act** and alter/amend as required.

6) Use the **Right** and **Left Arrow** cursor keys to navigate through the act.

Complete the various boxes as follows:

Cost If a *Doctors price* had been set up for the selected act its value will appear here, if not, the cost value will appear. Delete to replace with a different charge.

Paid If the patient is paying immediately enter the amount here. If the value entered is equal to the cost the

Status box will automatically become 'checked'.

Status This box represents the paid status of the **act**. This will automatically become 'checked' when the payment amount is equal to the cost amount. Whenever this charge is to be considered 'paid' this box should be 'checked'.

Debtor If the charge is to be billed to a third party - like a health insurance company - the name of the company is entered here. Create debtors via the *Debtors Editor*. See Fig 3-3.

Receipt If a receipt has been issued for this charge click on this box to 'check' it.

Doctor This drop down box lists all physicians in the practice. By default it will select the logged on Doctor/User.

Comments This is a free text box for any comments.

Synchronise In instances where a practice is in more than one location this box indicates that the charges should be moved/synchronised between them.

7) Once the charges and payments have been entered as required the **act** must be saved. Click once on the Edit/Select button to the left of the new act. Click **OK** to save changes when prompted.

8) If Invoices/Receipts are to be issued do so now (see below) otherwise save the patient's file.

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Printing Receipts and Invoices

Payments/Receipts

When a patient pays for an **act**, either immediately or sometime later, this should be entered in the **Paid** box of the **act**. As soon as a payment is entered the receipt button on the Billing Panel Toolbar will activate. Click on it to print the receipt. Select **Receipt35.CVS** and click **Open**. The receipt will appear for previewing.

To print the receipt select the menu **File / Print** or use the short cut **Ctrl + P**

Click also the act **Receipt** box to indicate that a receipt has been taken for this **act**.

Invoices

If an invoice is to be issued for all **acts** click on the invoice button on the Billing Panel Toolbar. Select **Bill35.CVS** and click **Open**. The invoice will appear for previewing.

To print the invoice select the menu **File / Print** or use the short cut **Ctrl + P**

If an invoice is to be printed for a specific **act** or **acts** hold down the **Ctrl** key and

click on the Edit/Select button
for each **act** to be invoiced to
select it.

Edit / Select
Button

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Invoices

Now, hold down the **Shift** key and press **F8** or alternatively, **Right Mouse** click on one of the selected **acts** and select *Invoice selected acts* from the pop up menu.



Select **Bill35.CVS** and click **Open**. The invoice will appear for previewing.

To print the invoice select the menu **File / Print** or use the short cut **Ctrl + P**

Entering Payments

1) Click on the **Filter** button on the Billing Panel Toolbar and select **Unpaidacts** from the drop down menu.

- 2) Enter the amount in the **Paid** box of each act being paid. Note: if the payment had previously been part paid enter the complete paid amount.
- 3) Print receipts if required (see above).
- 4) Check the **Receipt** box of the **act/acts** affected.

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Billing Techniques
Printing Reports

The Population Analyses - Database Analyses module includes reports

specifically for the
Billing feature.

These are available in detailed or summary form by Patient, Doctor or Debtor.

- 1) Click on the Population Analysis Button on the **HEALTHone™** Analysis Toolbar.
- 2) Click on the Database Analyses Tab.

- 3) Click on **Billing** to view the billing analyses reports.

- 4) Select the report you require and click on the **Execute** button.
 - The selected report window opens
- 5) Select the date range for the report or the *Last number of days* as required.
Click on the **Execute** button to run the analyses.
 - Results appear in tabular form.

6) Click on the **Printer** button to preview and print the report.

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5.0 **Billing**

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5.1 Managing Patient Files

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Managing Patient Files

This section describes the techniques of deleting, synchronising, exporting and importing patient files.

Deleting Patient Files

HEALTHone™ moves files in the *Patient Selector* window to the *Deleted Patient Selector* window. The deleted patient files can be viewed in the *Deleted Patient Selector*. If files are subsequently deleted from the *Deleted Patient Selector* window they will be deleted permanently

Deleted patients can be restored from the *Deleted Patient Selector* back to the *Patient Selector* in cases where they have been deleted in error.

Deleting A Patient File

Locate the patient in the Patient Selector
Select the patient (do not open the file) by clicking once on the patients name. Press the **Delete** key. Answer **OK** when prompted.
Alternatively, select the **Delete** Patient Selector button at the bottom of the screen.

- Patient removed from the Patient Selector window.

Viewing Deleted Patient Files

Right click anywhere in the Patient Selector and select **Show deleted patients** from the menu.

- Deleted Patient Selector appears.

Deleted patient files can not be opened - if this is necessary, restore the file to the active Patient Selector. See next topic.

Re-Viewing Active Patient Files

Right click anywhere in the Deleted Patient Selector and select **Show active patients** from the menu.

Active Patient Selector re-appears.

Restoring Deleted Patient Files

Select the patient file in the *Deleted Patient Selector*

Click on the **Restore** Patient Selector button at the bottom of the screen. Answer **OK** when prompted.

Permanently Deleting a Patient File

Select the patient in the

Deleted Patient Selector

Click on the **Delete** Patient

Selector button at the

bottom of the screen.

Answer **Yes** when

prompted.

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Managing Patient Files

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Managing Patient Files

Synchronising Patient Files

In practices that have laptop computers and/or more than one geographical location it will be necessary to keep different sources *synchronised* together. HEALTHone™ provides a wizard to make this a straight forward task.

Firstly, both sources must have been

subscribed to in **HEALTHone™**. The subscribing of sources is part of the installation procedure. See session eleven for details on this.

Secondly, you must have the rights to perform this action - if not see your system administrator.

- 1) Login to anyone of the sources to be synchronised
- 2) If you wish to synchronise only selected patients - select them now in the Patient Selector.
- 3) Click on the Synchronisation Wizard button on the **HEALTHone™** toolbar.
 - The Synchronisation Wizard window appears.
- 4) The first screen is just informative - click **Next**
 - The next Wizard window appears
- 5) The next screen prompts to synchronise the **all** or **selected** patients - choose whatever is appropriate. Click **Next**
 - The next Wizard window appears
- 6) Click on the **Select Source** button and login to the source to be synchronised with.
 - The wizard window should now have two sources declared. Firstly, the one you initially logged on to and secondly the one you just selected. See fig 10.13

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Managing Patient Files

Synchronising Patient Files

7) Select the direction of synchronisation or select both directions as required.

See fig. 10.13 . Click on **Next**

The next Wizard windows appears

HEALTHone™ enables just certain types of information to be synchronised if required, for example just Clinical Data(HCR) or Billing Data or Appointment Information etc. The next screen of the wizard enables these to be selected.

8) Select the information to be synchronised. Click **Next**

The next Wizard windows appears

The next window of the wizard enables data to be synchronised by date and time -

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(if left un-checked all records will be synchronised regardless of date or time) and
for all or a single user.

- 9) Select the date/time settings as required.
- 10) Select the User or All Users (leave un-checked) as required.
- 11) Click **Next**. When the final screen appears click **Finish**

The synchronisation occurs.

Fig. 10.13 Synchronisation Wizard

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Managing Patient Files

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Managing Patient Files

Synchronising Patient Files

12) At the end of the synchronisation you can optionally view details or simply
click **OK** to finish.

Fig. 10.14 Synchronisation End Dialogue Box

After synchronisation in both directions

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5.1 Vaccination Techniques Page 2 of 15

Vaccination Techniques

Introduction

HEALTHone™ has a number of features which aid the recording and

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reporting of
vaccinations, these include:

- A built in database of vaccines that the user can easily maintain. Allowing batch numbers and expiry dates to be edited as well as new vaccines to be added.
- A schedule for childhood vaccinations that *HEALTHone*™ automatically tracks for due dates and received vaccinations from the date of birth.
- New population analysis reports specifically designed to analyse the childhood vaccinations schedule.
- The Patient Information Panel has a tab dedicated to vaccinations. Overdue vaccinations appear in red and automatically activate this tab causing it to appear in front of the others.

The Patient Information Panel opposite shows four vaccinations have been missed and are overdue. Due dates are automatically calculated from the child's date of birth.

Recording Non Scheduled Vaccinations

The following method is used to record all vaccinations unless a *childhood vaccination schedule* is being used. In cases where a schedule is being used for childhood vaccinations the method *ChildhoodVaccination Schedules*, documented later, should be

employed.

Technique – Recording a Vaccination

1) Open the patient's file and add (click on the stethoscope icon) a new medical transaction with a *Type* equal to **Contact** and the *Name* set to **vaccination**.

- A new medical transaction is inserted into the patients file.
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5.1 Vaccination Techniques Page 3 of 15

Technique – Recording a Vaccination

- 2) Insert the sequence (**Shift + F4**) *Vaccine* into the new transaction.
 - 3) Ensure the item *vaccine:* is selected and press **Return**
- Item Vaccine: now opens and also its associated list.

Note:Upgrading Users The associated list appearing for the item *vaccine:* is retained for compatibility with previous methods – however; we recommend that it is **NOT** used, but rather select the vaccine from the new *Vaccine Database* as described below.

- 4) Close the *Associated List* box.
- 5) Click on the *Vaccine Button* to open the vaccination database.

Alternatively use the short cut **Ctrl + Alt + V**

- The vaccination database window opens

6) Enter text into a filter box. In Fig. 3-23 the **HEALTHone™** term *typhoid (V)* has been used, however, the vaccine(s) could equally have been filtered by *Vaccine Name, Manufacturer or Batch Number* by entering text into their respective filter boxes.

7) Locate the vaccine and select it. Click **OK**

- The vaccine details are entered into the item vaccine PLUS the item attributes are also set to their correct values. See Fig. 3-24 **Vaccination Database Window** – Filtered for typhoid vaccines

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Vaccine Button

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Technique – Recording a Vaccination

Note: The item **vaccine:** values for *Dose, Site, Manufacturer, Batch number* and *Expiry date* are extracted from the vaccine database. They can be adjusted to correct any changes for this particular vaccination.

If the *Batch Number* is amended a prompt will appear to request if the vaccine database should also be updated.

By preference the Batch Number and Expiry Date should be changed by configuring the vaccination database. See the heading *Maintaining the Vaccination Database* later in this section.

Vaccine Item – Attributes automatically set the values of the selected vaccine.

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Technique – Recording a Vaccination

8) Correct the item attribute values if required. Click **OK** to close the item.

The vaccination details are recorded in the current transaction and also appear

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on the Vaccine tab of the Patient Information Panel.

Specifying Recall Dates

If childhood schedules are not being used the method of specifying a recall date utilises the item *Plan of action*: If schedules are being used this procedure is NOT required.

The *Vaccine* sequence includes the item *Plan of action*: and this will also be present (refer back to Fig. 3-22) in the current transaction.

- 1) If the item *plan of action*: is not present in the current transaction insert it now, by clicking on the *Insert Item Button* on the item panel toolbar.
- 2) Ensure that *plan of action*: item is selected and press **Return** to activate it.
- 3) Select **vaccine** from the associated list.

Note: The object here is to place the word **vaccine** into the *plan of action*: item – not to re-state the type of vaccine – that has already been done in the item *vaccine*:

- 4) Cancel the associated list box.
- 5) In the *plan of action*: item details check the *Date of event* box and enter the RECALL date required.

6) Click **OK** to close the *plane of action*: item.

The recall date has now been specified. This child will now be detected by the population analysis reports designed for childhood vaccination reporting.

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Childhood Vaccination Schedules

HEALTHone™ has a scheduling feature designed to manage childhood vaccinations. There are two phases involved:

Assignment This phase is repeated once for each child. It places the aggregate item *vaccination schedule*: into the child's file and links the timing schedule to it.

Recording This phase is repeated for each vaccination – recording its details: *date, vaccination name, batch number, expiry date* etc.

Note: Users that are upgrading from an earlier version will first need to create the aggregate item **Vaccination schedule**: Refer now to the heading *Techniques for*

Upgrading Users further on in this section.

Assignment Phase – Insert the Schedule into the Child’s File

A child being presented for vaccination is assigned a *Schedule* by inserting the aggregate item **vaccination schedule**: into the Basic Medical Information transaction. Once inserted the timing is activated by linking the schedule to a timing set of rules and selecting the child’s date of birth.

Technique – Insert the Schedule into the Child’s File

- 1) Open the child’s patient file.
- 2) Select the Basic Medical Information transaction.
- 3) Open the aggregate item selector by using the short cut **Shift + F5**.
- 4) Select the aggregate group **Vaccination schedule** and click **OK**

The schedule is inserted into the Basic Medical Information transaction.

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Assignment Phase – Insert the Schedule into the Child’s File

Technique – Activate the Schedule Timing

- 5) **Right Click** on the **Vaccination Schedule**: item and select *Apply*



vaccination schedule:

Vaccinations from the pop up menu.

A prompt appears with the child's date of birth

6) Click **yes** when the prompt appears.

The schedule is activated appears in the Vaccine tab of the Patient Information panel.

See Fig. 3-25

Recording Phase – Recording Vaccinations using the Schedule

This process is repeated for each vaccination a child receives.

The vaccine schedule appears in the Vaccine tab of the Patient Information Panel. Fig. 3-25

The vaccination schedule lists the type of vaccination required at a given due date based on the child's date of birth. Each vaccination type is linked to a particular vaccine or vaccines in the vaccination database.

Technique –To record a vaccine:

- 1) Create a new medical transaction *Type* = **Contact** and *Name* = **vaccination**
- 2) Click on the *Vaccine* tab of the Patient Information Panel to bring it into view.
- 3) Click ONCE on the vaccination that is being received this time to select it.

3-25

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5.1 Vaccination Techniques Page 8 of 15

Technique –To record a vaccine:

- 4) Click on the injection needle icon on the *Vaccine* tab toolbar (see Fig. 3-25) or use the short cut **Ctrl + Alt + V**

What happens next is dependent upon how many vaccines are in the *Vaccine Database* for the selected vaccination type. If only one vaccine exists this will be issued immediately with its name, today's date, batch number, expiry date etc – Go straight to step 6). If more than one vaccine exists the vaccine database window will open, displaying all matching vaccines – Go to step 5).

- 5) When the *Vaccine Database* window opens – choose the vaccine being administered this time. Click **OK**

A new item vaccine: appears in the current transaction displaying the vaccination details.

6) Check the vaccination details. If necessary amend the details by highlighting the item **vaccine:** and pressing return. Click **OK** to close the details.

Note: The item **vaccine:** values for *Dose, Site, Manufacturer, Batch number* and *Expiry date* are extracted from the vaccine database. They can be adjusted to correct any changes for this particular vaccination.

If the *Batch Number* is amended a prompt will appear to request if the vaccine database should also be updated.

By preference the Batch Number and Expiry Date should be changed by configuring the vaccination database. See the heading *Maintaining the Vaccination Database* later in this section.

The date completed details in the Vaccine tab of the Patient Information Panel is also updated.

7) Repeat actions 2) – 6) for any other vaccinations being administered at this time.

Manufacturer Dose Site Batch No. Expiry Date Count

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Changing the Scheduled Due Date of a Vaccination for

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a Child

There may be instances where it is known that a due date for a vaccination will be missed, i.e. due to a holiday etc. To prevent HEALTHone™ reporting this as overdue the due date can be altered:

Technique

1) Locate the vaccination concerned in the *Vaccine* tab of the Patient Information Panel. **Double Click** the vaccination.

The transaction that contains the schedule opens and the selected vaccination is shown in a dotted box.

2) **Right Click** the vaccination in the dotted box and select

Shift Vaccination due date from the pop-up menu.

A prompt box appears to request information about the new due date.

3) Complete the prompt box by typing a number and selecting the Day, Week, Month etc from the drop down selection box.

Due date changes for the selected vaccination.

Note: If a number of vaccinations are to be moved select them all before right clicking. All selected vaccinations will have their due date altered in the one operation.

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Managing Vaccination Refusals

The method of recording a vaccine refusal depends upon how the vaccination is being recorded.

- Former method** Not using a vaccination schedule and specifying the refusal directly in the **vaccine:** item.
- New method** Using the Childhood vaccination schedule.

Former Method

If childhood vaccinations are being individually recorded the technique is:

- 1) Open the patient's file and add a new medical transaction with a *Type* equal to **Contact** and the *Name* set to **vaccination**.

- 2) Insert the sequence (**Shift + F4**) *Vaccine* into the new transaction.
- 3) Ensure the item *vaccine:* is selected and press **Return**
 - Item *Vaccine:* now opens and also its associated list.
- 4) Locate the term **refusal** in the *Associated List* box. Click on the **Insert** button.
 - The term *refusal* now appears in the vaccine content box.

Note: DO NOT type anything else in the item content box (i.e. the name of the refused vaccination) because *HEALTHone*™ only reports those items with a *sole content* of the word *refusal* as being refused. The vaccination name is entered in the item comments box.
- 5) If necessary click the *expand* button to view the item attributes. Check the *Date of event* box and type the name of the vaccination refused in the comment box. Click OK to save item.
- 6) Right click on the item and select **Display / Comments** from the pop up menu.

New Method

If a childhood vaccination schedule is being used:

- 1) Select the refused vaccination in the *Vaccine* tab of the Patient Information Panel.
- 2) Click on the **Refusal** button on the Vaccine Tab toolbar

Refusal Reporting See next heading *Childhood Vaccination –*

Recalling/Reporting.

Refusal Button

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Childhood Vaccination – Recalling/Reporting

The population analysis reporting is used to produce reports regarding childhood vaccinations. The choice of report depends on the method used:

- Former method** Not using a vaccination schedule and specifying the recall date in the **plan of action:** item.

- New method** Using the Childhood vaccination schedule.

Technique

- 1) Close and save any open patient files
- 2) Select the menu **Analysis / Population analysis.**
(Short cut = **Shift+F7**)
- 3) Click on the *Database Analysis* tab.
- 4) Expand the *Vaccines* section.
- 5) Select and Execute reports as required

Reports for the Former method

If you are using the former method of recording childhood vaccines use the following report to list those patients who have an overdue vaccination:

Planned Vaccines (Plan of Action)

Reports for the New method

If you are using the new schedule method of recording childhood vaccines use the following report to list those patients who have an overdue vaccination:

Planned Vaccines (Due Dates)

Overdue vaccine

Reports for the Either Method

Regardless of what method is being used the following reports are applicable:

Patient's with a vaccine between two dates

Vaccines Monthly – All together

Vaccines Monthly – All together (Per child)

Vaccines Monthly – History per child

Vaccines No Record

Vaccines Refusals

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Maintaining the Vaccine Database

The vaccination database will need to be updated whenever a new batch of vaccines is received or a vaccine is released on to the market.

Opening the Vaccine Database

- 1) Click on the *Vaccine* tab of the Patient Information Panel for any patient.
- 2) Click on the **Configure** button on the tool bar (see Fig. 3-26)

Changing Batch and Expiry Dates

- 1) Locate the vaccine to be edited by typing its name in the **VaccineName** filter box, or if known, type the old batch number in the **Batch Number** filter box.
- 2) Once the vaccine has been located edit the old data. i.e. batch number details, expiry date etc.
- 3) Click the tick box to save your changes. See Fig. 3-26
- 4) Click the **Close** button to close the vaccine database window.

Adding a New Vaccine

- 1) Open the Vaccine database as outlined above
- 2) Click on the *Plus* button (see Fig. 3-26).
 - A new blank line appears at the end of the database.
- 3) Select the vaccine type from the HEALTHone™ term drop down box that this vaccine belongs to (i.e. Influenza [V]).
- 4) HEALTHone™ automatically offers the type as the name for the vaccine, simply select this and type the actual name. Complete the other details.

- 5) Click the tick box to save your changes. See Fig. 3-26
- 6) Click the **Close** button to close the vaccine database window.

Filters

New Vaccine Plus Tool Accept Changes Tick

3-26

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Techniques for Upgrading Users

Create the aggregate item Vaccination Schedule and Timing Schedule

This action is performed only once and creates the aggregate item *vaccination schedule*: containing the current list of childhood vaccinations. In conjunction with this a *timing schedule* (set of rules) is declared that states when the vaccinations should occur with respect to the child's date of birth.

Technique – Create the Vaccination Schedule Item

- 1) Exit the HEALTHone™ program.
- 2) If there is a RED HEALTHone™ icon on your desktop double click it to launch the configuration tool. Alternatively select the menu **Start / Programs / HEALTHone™ / HEALTHone™ Tools / Configuration Tool**.
- 3) When the logon screen appears log in as you would for HEALTHone™.

Note: The configuration tool is used to control many of the features within HEALTHone™ and is documented in a separate manual. For this reason

pay

attention to the steps outlined below and follow them carefully.

4) Select the menu **File / Open / Aggregate** or use the short cut **Shift + F5**

The aggregate item screen appears. This has its own toolbar.

5) Click on the last button on the right of the aggregate tool bar (see Fig. 3-27)

The aggregate item is now created and also its timing schedule.

6) Select the menu **File / Exit** and click **yes** to save changes when prompted.

The Configuration Tool closes.

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Linking Existing Vaccinations to a Schedule

Upgrading users will have a number of child patients that have already received some childhood vaccinations at the time of the upgrade. These vaccinations will appear as independent entries in the *Vaccine* tab of the Patient Information Panel.

If the child is under a year old we recommend that a vaccination schedule is also included, those vaccines already administered will appear as *overdue* as far as the schedule is concerned – because their entry in the schedule will be blank.

This problem is overcome by linking the existing vaccinations received to their corresponding entries in the vaccination schedule.

Technique

1) Insert a schedule as detailed in the procedure *Assignment Phase – Insert the Schedule into the Child's File* above and activate the timing schedule.

The Schedule now appears in the Vaccine tab with a number of vaccinations in RED indicating that they are overdue.

2) Double click on the EXISTING vaccination to be linked to the schedule.

The transaction that contains the vaccination is opened and the vaccination highlighted by a dotted box

3) Ensure the EXISTING vaccination is still selected (dotted box around it)

if not click on it once to select it. Now click on the schedule vaccination, in the *Vaccine* tab, that it is to be linked to.

- The link icon on the Vaccine tab will activate. See Fig 3-27

4) Click on the link icon (see Fig. 3-27).

- The link occurs and the scheduled vaccination is marked as completed and turns black in colour.

5) Repeat for other vaccinations that require linking

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Existing Childhood Vaccinations

Existing vaccination.

Scheduled vaccination to be

linked to.

Link icon

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Vaccine item displayed with vaccine grid

We can automatically have the item « vaccine » display the vaccine grid.

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To do this you have to open the configuration tool – click on the button
Click on File open item
Type in the term « vaccine » and change its entry style to « vaccine »

Now the grid opens automatically when you call the item “vaccine”.

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5.1 Plan of Action Page 2 of 19

Introduction

The « plan of action » concept allows you to plan an action or a series of actions for a patient. In this way your patient can benefit from a prevention schema which helps you with the follow up of the patient.

In Ireland, using 3.7 and earlier version we used the item attribute « Date of event » as a planning date. Thus when a patient had a cervical smear done we would add the item

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« plan of action » with the content = cervical smear and edit the « date of event » to a date, say 3 years into the future. We would then be able to recall these patients via our population analyses.

THE OLD WAY

In 5.0 we use a slightly different way of entering the due date for a planned action. This new way allows a much greater flexibility in viewing our planned actions and setting alerts for actions that are, for example, overdue or nearly due.

THE NEW WAY

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As you can see from this screenshot you can specify several things about this plan of action

1. Planned date for the action : Here you can enter either the exact date you want the action to be done or a time interval when it should be done, say in 3 years time.

2. The frequency of the action to be carried out there after. You use this only if

you wish to repeat the action at a given time interval into the future. You can also say here how many times you want to repeat the action into the future.

HEALTHone™ will then automatically ask you do you want to carry on with the plan when the number is up.

3. Whether you require a **reminder** to appear in the patient file when you open the record

4. Who is **responsible** for carrying out the plan

5. What **item name** you would like to use when you declare the action as being done.

These are all configurable

Now when you open the patient file all her planned actions are visible in a new tab next to the billing tab in the medical section of the file

This is how the item will be entered in the patient file

And when you click on this tab you see a list of planned actions for this patient :

You can also plan an action using any item in HEALTHone™. If the item

is in the file, you
can right click and choose « plan the action » from the menu or hit the
Combination Keys
CTRL+L

Viewing the action plans :

A. In the individual patient record

You can click on the action plan tab and see any actions that have been
planned. These
can be filtered by clicking on the filter button as below

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B. Viewing the Action Plans for the entire patient population

We now have a new tab in the patient selector called the « action plan »
tab

If you click on the action plan tab you are presented immediately with all
the actions
planned for the entire patient population :

You now have many options open to you to filter the list according to
various criteria. For
example ;

Planned date : if you click on the down arrow in the planned date
column you can see that

you can filter the actions by various time scales :

In fact, this filter is very powerful. You can use, not only the options in the provided menu,
but you can insert dates with mathematical syntax e.g.

Show me all actions planned between 01/01/2006 and 31/03/2006
>01/01/2006 <31/03/2006 (note there is a space before each operator)

The syntax for the filter is as follows

- Choose a single month (Ex : 06) or a particular year (Ex :2006)
- You can use the greater than and less than operators as above
> and <. (Ex : >2005 < 07/2005, >01/2005 <2006, ...)

You should play around with this to get some interesting results.

Item Content : This is self explanatory. You can filter the list to show all cervical smears or all abnormal lab results that came in today and are due to be done my me.

Note: You can send a mail merge letter to patients on this list by using the new mail Merge function. This is described separately.
You can, with version 5.0 insert a plan of action directly into a lab result as it appears in the DXM inbox (see later).

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When a planned action is done ?

Now you have a list of planned actions in the action plan tab for the entire population and also, possibly, a list of planned actions in each patients file, visible when you click the action plan tab.

When you actually carry out these plans, how do you manage the plan. There are several ways of doing this. However, in Ireland we advise you to stick with the following protocol.

1. Individual patients :

If an action is planned, there will appear in the patient record, an additional tab called « action plan ». This tab contains a list of all the planned actions. You can click on one of the buttons at the top of the action plan tab, or right click on the action plan to get a list of possible actions. One of these is to « set the action as done »

Setting the plan as « done » will remove the plan from the list in the patient file and also from the population list. An item will be inserted in the medical section to say the action is done. What item you use will depend on the options you set in the tools\options\action plan\ menu. By default the item name will be « done » and the content will be the name of the action :

You will also, of course, have to enter the result in the normal manner. For example, if a smear comes back, you will enter the item « cervical smear » with the result as the content. In the case of a lab test you will enter the item name and the result, unless the result is imported electronically when it will be added in the same way - haemoglobin A1 --- 7.8

NOTE : If you do not set the plan as done it will continue to appear in the list of planned actions and will soon make the list worthless.

Prevention Module

The prevention module consists of two parts

1. A user defined list of action plans known as a **prevention template**
2. An **Alert** that be triggered in the patient file and is user configurable.

The **Prevention Templates** are a series of planned examinations i.e. **protocols** that allow you to follow the evolution of a particular patient pathology, e.g. diabetes. This is something like a sequence but is linked to the plan of action and the alert functions.

An **Alert** is a notice which can be automatically triggered by certain information contained within the patient record. For example, if a patient has the item « problem » with the content = « diabetes » you can trigger an alert which tells you the patient is diabetic. It is then possible to link this alert to a prevention template such that, not only does the alert tell you the patient is diabetic, but may also suggest that you put a series of planned actions, automatically in the patient record but only if the prevention template has not already been added.

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Creating a prevention template

When you need to do certain tests/examinations/investigations on a regular basis, you can organise them into prevention templates by using the configuration tool. The mechanism is similar to the use of the vaccination templates used for planning childhood vaccinations. Each action plan can have a date attached which HEALTHone™ will remember and alert you, if you wish, when it is due.

- 1) Open the configuration tool with the button  (manage prevention templates). The prevention template window opens

- 2) In the list of templates window on the left, click the button  to add a new template
Insert the name you wish to give the template e.g. « diabetic protocol ». The name of the template appears in red next to a pencil icon

- 3) Now click on the pencil icon and the name is saved and changes from red to black

- 4) Now click the  icon at the bottom of the right hand window « content of the selected template». A new window appears :

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As you can see, some of the boxes are filled in already with default contents. These contents are defined by the user in the main HEALTHone™ toolbar menu tools/options/action plan. In this case the next planned date is 3 years, the frequency is 3 years and the item name HEALTHone™ will use when you set an action plan as done, will be « done »

5) Now you complete the fields as you please.

- Item name: Select an item from the list (usually « plan of action »)
- **Content** : Add a description in free text
- **Planned date** : define the date the action should be done or the time interval
- **Frequency** : If the action should be repeated, tick the box and define the interval. You can also enter the number of times the action should be repeated.
- **Reminder** : Here you can enter when you want a pop up reminder to appear e.g. 2 weeks before the action plan is due.

6) Repeat the procedure above for each plan of action you require for this prevention template

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Inserting the prevention template to the patient record

- 1) Open the patient file and create a new transaction
- 2) Use the main **HEALTHone™** menu (Insert\prevention template)

- 3) Alternatively you can click on the icon
- 4) On the left you can see the name of the templates, on the right the action plans that have been defined. Select a template and click OK

The template appears in the patient file as follows :

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Alarm or Notification

Whenever an action is planned, **HEALTHone™** will notify you when you open the patient record. You can choose the various ways you can be notified in the options menu.

Open the options dialogue from the main **HEALTHone™** menu (Tools\options\Alert tab).

Here you can define the way you want the alerts to behave when activated

A notification in the HCR may appear

The Action plan tab in the patient file may be selected by default

And you can have it play a sound if you wish !

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Carrying out your action plans

HEALTHone™ offers you two ways to indicate that an action plan is done.

In the action plan tab in the patient file you can directly edit the status of an action so as to show which actions are done and which are not. Click on the down arrow to display the possibilities

Or in the medical section, select an action plan, use the right click to display the contextual menu or simply hit the Combination keys (Ctrl+Q).

A window opens where you will decide the date of the action and the name of the item used to save the action plan. The defaults are defined in tools/options.

To indicate that the action is done, a new item (the action item) is entered to the transaction :

he name of the item has been defined in the configuration tool but may be changed here.
A new plan of action may be entered here also, automatically, depending on the setting you decided in the configuration tool when defining the prevention template.

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The Alerts

An Alert is a notification in the patient file which is triggered by defining certain criteria. The alerts are configured by the user and consist of a message which is displayed when an automatically launched analysis produces a result (or by option does not produce a result).

The alerts are defined in the configuration tool as follows :

Open the HEALTHone™ configuration tool.

Click the button to display a list of the alerts. (You may also use the menu item file\open>alerts).

The list on the left shows the details of the alert. The list on the right shows the list of prevention templates which may be linked to a specific alert on the left.

The alerts that are invalid (for example the analysis corresponding to the alert does not exist) are displayed in red. Only the valid alerts can be triggered.

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Defining an Alert

You can add, edit or delete an alert with the appropriate buttons at the bottom of the list of alerts (see previous screen shot. « + », « - » and . You can also use the Combination

Keys : Ins, Ctrl+D et Ctrl+E.

Click on the to create a new alert.

Click the « enabled » box to enable the alert.

Give a name to the alert. This will be displayed in the notification.

Choose an analysis from the list. The analyses that are available are those created in HEALTHone™: They are taken from those analyses available from the main HEALTHone™ menu

Analysis-formulas-extraction formulas

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Some « System » analyses are included in the list as well as the extraction analyses. For example, « patients birthday ». The system analysis are placed at the end of the list.

Tick the « result » box if the alert should be triggered when the analysis gives a result.

Un-tick the « result » box if the alert should be triggered when the analysis gives no result.

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Triggers : These options allow you to decide under what circumstances the alerts should be triggered.

- Manually by the user : The analysis is not executed until you click on the menu item tools
- .
- During the Update of the HCR : With each modification of the HCR, the analysis will be executed.
- On opening the patient file: The analysis will be executed when the file is opened
- On closing the patient file: The analysis will not be executed until the file is closed.

Insert a message in your own language. You can translate this into several

languages if you use these.

Note:

* The result of the analysis is **not used**, only the presence or absence of a result is taken into account.

Let's take a few examples

Example 1 : Patient's birthday

- 1) Click the button to create a new alert
- 2) Complete the information

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Example 2: The patient has never had his weight checked?

- 1) Click the button to create anew alert
- 2) Fill in the boxes

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Linking a prevention template to an alert

In the configuration tool alert window, you can link (or un link) an alert to a prevention template by clicking on the « + » and « - » below the list of templates via the right click

menu or via the Combination Keys, Ctrl+L and Ctrl+U.

Within the patient file you can search for a prevention template after clicking on the button shown below.

The prevention template selection dialogue appears :

Triggering of the Alerts

The alerts may be triggered either manually, on opening the patient file, after editing the file, on closing the file ; or manually by the user at any time by clicking the menu tools\trigger alerts or by using the Combination Keys Shift-Ctrl-F4.

The alerts may be displayed by several means within **HEALTHone™**.

1. A sound may be emitted
2. A written notice may be displayed in the patient file. A simple click in this notice will make the alert go away.
3. A button appears in the patient file, on the far right of the top of the medical side.
4. The list of alerts may be displayed automatically.

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Looking at the Alerts

Click on the bell button in the patient file or use the Combination Keys Ctrl-Alt-A

A dialogue appears containing the list of alerts

When you close the dialogue, the alerts are considered as read and do not appear the next time you open the file, unless you declare otherwise by un-ticking the « Hide read alerts ».

In this case the read alerts will be in ***italics*** to differentiate them from unread alerts :

The button allows you to deactivate an alert. In this case this alert will not appear for any patient file in the future. You can re-activate the alert by going into the configuration tool alert function (see above).

The button allows you to manually insert, from within the alert notice, a prevention template linked to an alert. If however a prevention template is not linked to the alert, this button will not appear in the alert notice. When you click on this button, a menu appears from where you choose from a list of prevention templates. You can choose one or all of the templates. The templates already inserted and the invalid templates will be greyed out and you will be unable to insert them.

Note: If all the templates linked to an alert have already been inserted to

the patient file, this alert will not be triggered. The alerts that are not linked to any prevention template will themselves always be triggered.

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Options

The Plan of Action functions may be customised in the options menu – main HEALTHone™ menu tools\Options\Action Plan

Default values :

- Default Frequency: The frequency with which the actions are repeated
- Default realisation item : The item name used to indicate that an action is done
- Use the plan of Action item as the realisation item : Use the same item name to indicate that an action is done as is used for the planning.
- Exclude week-end in date calculation : Avoid a due date being a week-end

Display :

- Display vaccines in the plans of action : If you tick this box the vaccines in the vaccination schedules appear in the action plan tab in the patient file – but not in the action plan tab of the selector.
- Display non read transactions in the list of action plans : Tick this and you can display all un read transaction in the action plan tab.

- Ask to create an action plan in not today's transaction : If you make an action « done » in an older transaction you will receive a confirmation dialogue.
- Display a dialogue when an action is done : Display a confirmation dialogue when you declare an action as done.
- Automatically select today's transaction for the action plan : If this is ticked, the action plan is automatically put into today's transaction, if it exists.

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Initialise the « Un read » status (for the following items):

- Import of lab results: After lab results are integrated, they receive an « un-read » status
- Import of HEALTHone™ HCR's : If you import a patient file, all its transactions will be tagged as « un-read »
- Synchronised transactions : Appear as un-read if ticked.

Reminders :

- Enable a default reminder to: How much time before an action is due do you want the reminder to be triggered
- If a reminder should be displayed: If you tick the option « Select the action plan tab » - « whenever a reminder is to be displayed », then when you open HEALTHone™ the action plan tab is automatically displayed, instead of the medical section tab.

Analysis :

- Filter the action plan for the current user (population analysis) : Only the action plans for the logged on user are displayed in the action plan tab of the selector by default.
- Exclude action plans from item analysis : Planned actions are not

taken
care of when you do an item analysis (Ctrl_I or Ctrl_M)

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Queries: Extraction of Data



Introduction

The Query Plus module provides a simple yet powerful method to extract data from a population of patients based on user specified criteria. Furthermore, the query results can be combined with one another to provide added flexibility.

Query Plus is based on the same concepts as the medical record. There are three levels:

Patient, transaction and items. You can specify criteria at each level.

For example

provide a list of all females, older than 60 years (Patient, Sex=female, Age>=60), that were

seen in the last 12 months that have received a flu vaccination.

Patient

Sex=female

Age>=60

Transaction

Date>01/01/2005

Item

Vaccine, content, contains, flu

With Query Plus, you can select multiple items. You can also exclude patients that have an item containing a particular (or any) content.

1) Open the module Population Analysis. Select the menu **Population analysis**.

2) Normally the tab “Database analysis” will be immediately visible

3) The last item in the menu is “User analysis”

Note: This screen can be directly accessed from the main **HEALTHOne™**

screen by clicking on the icon

4) Click on “New” and the following window appears.

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Population Analysis Criteria Window

1) Enter a description for the query in the “Analysis name” box and a description

for the category group in the “Group” box.

2) The various options to create your query are divided into sections:

Patient Criteria

Transaction criteria

Item Inclusion criteria

Item Exclusion Criteria

Restrict to another analysis

3) Each of the sections has tick boxes to the left of the criteria. These determine

whether the indicated field will be displayed in the result or not.

4) Now we will deal with each of these sections in detail

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Patient Criteria

From this section, we can choose to search from any or all of the three criteria Age, Sex, and Display

1) **Age** – We can choose patient of a given age, an age between X and Y, Greater than (>) X or Less than (<) Y.

We can choose here whether to display the age in the final result or not by ticking the box.

2) **Sex** – Choose either all, male or female.

3) **Display** – Here we decide what fields we want to display in the result. The

choices made here will always display as well as those fields you may tick in relation to specific fields that you otherwise choose in your analysis.

The Possible fields that you can display here are those available in the patient selector.

In this particular analysis, we are making no choices from the patient criteria. Therefore we are choosing all our patients as a base for the extracting our information

Transaction Criteria

1) **Chapter:** - Here we can choose between Administrative Chapter and Medical

Chapter. This criterion is rarely necessary and should generally be ignored!

2) **Date:** - here we can choose between *all transactions*, transactions done *after* a particular date (greater than), transactions done *before* a particular date (Less than) or transactions *between* two dates.

You specify the dates in the columns to the right of the screen

3) **Type:** - Here we can choose the name of the transaction as displayed when creating a new transaction in HEALTHone™

In our current analysis, we will leave all these fields empty. Thus, we want to include all transactions in the patient files, no matter when they were done or what name we gave them

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Item Inclusion Criteria



In this section, we have the opportunity to include up to four items in the search. Thus, each row in this section corresponds to one item. Each column represents the possible options with each item

1. The tick box column is used to decide if the item name and content will be displayed in the result or not. Tick the box to display the item and its content.
2. The **item name** is entered in the second column. You can choose here from any HEALTHone™ item
3. The **Item Content** column. Here you can choose from several attributes of the item, namely the **main content, sub contact, or item codes.**

Normally you will use only the main content here.

4. The **fourth, “Contains”** column, is used to declare several possibilities in regards to the content. These include whether the item **contains, is equal to, is greater than, is less than etc, or even if the content exists at all.**

Open the options with the drop down list to see for yourself what the possibilities are.

5. In the fifth **“Contents”** column, you should say what content it is that you are looking for.

If you are looking for several contents of the same item, as in our viox case, you can enter all the required contents to the one “contents” box. Each content should be separated from the other by a semi-colon (;). Other mathematical operators that can be used are as follows:

- Replace the item name with a star (*), if you are looking for a content of

an unknown item.

- Use the hash sign (#), to search for a numerical or date value

Note: In our example, we are looking for all patients who have a repeat prescription for either of the drugs “Vioxx” or “Ceox”. We could have used two rows in the “item inclusion” section to achieve this. However, using the one row with the semicolon separator is more efficient.

6. The “**AND**” and the “**OR**” boxes at the top of the screen are used to declare whether each row is taken. Thus if we use the “**OR**” box we are saying that the search will give a result if either of the search conditions listed in the first two rows (above) are true. If we say “**AND**” then both criteria must be true to give a result.

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Item Exclusion Criteria

This section is based on exactly the same principles as the previous section “Item Inclusion Criteria”. You use the same methods for entering, **item name, contents, content parameters and actual item content.**

However, any information included in this section will be **excluded** from the search.

Thus, we might ask the question: Give me a list of all diabetes patients in the practice who

have never had their weight recorded. In this instance, the item content “diabetes” would be included in the “Item Inclusion” section, but the item name “weight” would be included in the “Item exclusion” criteria. Therefore, everyone who is a diabetic is included and then everyone in this list who has a weight recorded would be **excluded**.

Note: In the above example the “item inclusion criteria” section is governed by the “**OR**” parameter. Therefore, if any of the three criteria are true we will get a result.

In the case of the “Item exclusion criteria” section, as there is only one field included, it does not matter whether we use the “AND” or the “OR” parameter. The “AND” and “OR” parameters are used **within** each section and have no relevance **between** sections.

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Restrict to Another analysis

This section is an additional tool, which adds power to the original

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analysis. With this section, you can make one analysis dependant on the result of another, second, analysis.

In the example above you can, for example, make you first analysis to execute and then to

exclude patients found as a result of a second analysis, say, exclude those patients on glucophage, avandia or diamicon!

However, this section is most often useful when we use the “include” criterion.

Here are two examples of how it is best used:

a) You create one analysis to include many items: You create a second analysis

that excludes many things. You add the second analysis in the “Restrict to

another analysis” section of the first analysis.

b) You might want to use the second analysis to simplify the query. Let us say

you want to create an analysis to find all diabetic patients who have a BMI >

30: Create a first analysis to find all your diabetic patients; create a second

analysis to find all patients with a BMI > 30. You can restrict the first analysis to

the second.

You might use this method when the two analyses are useful in their own right.

It will save duplication.

THE ANALYSIS RESULT

Let us return to the “Vioxx” analysis:

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This analysis should give us a list of all our patients who have a repeat prescription containing either Vioxx or Ceoxx. The result will display the patient surname, first name, sex and DOB. It will also display the “repeat Prescription” item and its content.

1) You can execute this analysis directly from this screen by clicking on “execute”.

Alternatively, you can save this analysis by clicking OK. Click OK

2) You are presented with the list of all the user-defined analysis with your newly created analysis included in this list.

3) Within this screen, you have the options as displayed.

- E**xecute the analysis (Alt+X)
- E**dit the highlighted analysis (Alt+E)
- C**reate a **N**ew analysis (Alt+N)
- D**elete the highlighted analysis (Alt+D)

4) Click on “execute”

As you can see, we found four patients who have, in their repeat prescriptions, either Vioxx **or** Ceoxx.

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What can we now do with the result of this analysis?

HEALTHone™’s Data Ware House (DWH) “Query Plus” is a very

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powerful tool that allows the user to easily develop a range of analyses to suit his or her own needs. These analyses should be used as an adjunct to the “Built in” DWH analyses which have been pre-programmed by HEALTHone™ and contain most of the common, day to day analyses needed by the busy professional. With the result of the “Query Plus” analysis we have a new range of options.

- 1) We can simply Print the result – Click on the print Icon
- 2) We can copy the result to the windows clip board
From here, we can easily “paste” the contents into Microsoft Excel, for example.
- 3) We can export the result to a CSV file
This again can be imported by other programs such as excel
- 4) We can insert a “Plan of Action” into each of the patient files included in the result. This is indeed very powerful. We can then see at a glance from the patient selector all these patients. We can initiate an “alert” when we open the patient file which will remind us of the situation. Details of the “Plan of action” function are described elsewhere.
- 5) We can send a personalised letter to each of the patient in the result, asking them, for example, to contact the doctor for an alternative treatment. We would use the “Mail Merge” function in HEALTHone™ to do this. This function is described elsewhere but essentially involves creating a document template, within HEALTHone™, with the require message for the patients and including some “mail Merge” fields which would personalise the letter for each of the recipients.
This template might also contain an internal “HCR analysis” that will extract

specific patient information for the letter. In this case, **HEALTHone™** will first load all the patients found by the population analysis and then perform the HCR analysis before finally displaying all the letters on screen, for printing.

Note: Mail Merge is only available with the DWH Query Plus, when executing the analysis from the main database analysis window. It is not available from the DWH Query Plus **edit window**.

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Creating a mail merge letter to all patients found as a result of a DWH Query Plus analysis

- 1) Having performed the DWH analysis as described above, you should select all the records in the result with your mouse.
- 2) Click on the Mail Merge Icon – you are asked to choose the document template.
- 3) The document will be executed for each of the selected records. Each letter, in this instance will have a personalised greeting

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Creating an Action Plan for all the selected patients

- 1) Perform the analysis as described
- 2) Select all the patients with your mouse
- 3) Click on the Action Plan Icon as indicated above.

4) Fill in the various fields as indicated and Click OK

Note: Here you can choose

- a) The name of the responsible person to carry out the Plan of action
- b) Whether you want an alert to be triggered when the patient file is opened

This is the result in the action plan tab of the Patient Selector

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5.1 Mail Merge and Mail Shots Page 2 of 15

Mail Merging in HEALTHone™

HEALTHone™ document templates normally extract various bits of information from the patient file. We often extract single administrative items such as the patient's first name, surname etc, or we can extract other data such as the medical history/surgical history, last consultation etc, by means of "HCR analyses"

This type of data is extracted when we create a letter from an individual patients file and is

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described elsewhere. Examples of such templates are “quicklet” or maternity claim templates.

Mail Merging – what is it?

Mail Merge gives us the ability to achieve three different things:

1) Using Database files (DBF or Access) to enter consultants names to standard templates

Include the name and/or address of the consultant that we are referring to at the top of the letter, say the quicklet. We are including this function here because it is a prerequisite for the second function. However this function does not in fact use the specialized “Mail Merge” fields included in the HEALTHone™ text editor

2) Send a **personalised letter**, generated by HEALTHone™ for an individual patient, to **several recipients or destinations**. Thus we might want to send a quicklet for John Test to two consultants who are dealing with the patient.

3) Send a **personalised letter to several patients** about the same thing. For example we may want to find all males over the age of 50 and if they have not had a cholesterol check, we might want to send a letter to each of these patients. Each letter can be personalised so that we use the correct “mode of address” for example. Dear Mr. Test, Dear Ms. Burke etc.

The first two of these functions require the use of an external database containing a list of,

say consultants names and addresses. This information should be stored in a database file, either a “DBF” file or an “Access” database file. These files should be stored in the Honewin\DBF directory.

As these databases are localised they are not distributed with HEALTHone™. It is possible to create a database by following the steps below.

Creating Database files (DBF files)

- 1) Click on the button « manage associated databases » on the main toolbar in HEALTHone™
- 2) Click on the button « new table » on the right of the « database query » window

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Creating Database files (DBF files)

Below is a sample database we have just created:

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Using Database files (DBF) to enter Consultant's names to letters

In most normal situations when you are sending a letter to a specialist, you will not, in fact need to use the Mail merge facility. This would only be used if sending the same letter to several destinations. However, you would often want to insert the name of the specialist into the executed document. HEALTHone™ gives you this facility.

First of all you need to have a database containing the details of all the consultants in your area. These do not come as standard with HEALTHone™! However, some users have already created these databases in particular localities – enquire from the user group.

It is relatively easy to create DBF 111 file from an excel spreadsheet. Many people will keep a list of their local hospitals/consultants in this format. We cannot describe this process here.

Once you have a dbf (or access) file with the names and details of the consultants you refer your patients to, you should save them to the directory honewin\dbf of your current HEALTHone™ configuration.

The following procedure assumes you have a dbf file in the honewin\dbf directory :

- 1) Click on the main HEALTHone™ menu File\Open\Template
- 2) Choose an existing template as an example, say Quicklet.cvs
- 3) We will now enter a DBF field in the location indicated in the screen shot

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Using Database files (DBF) to enter Consultant's names to letters

4) Click on the button « insert text blocks {field} » -The following window appears

5) Choose the DBF file that you require, containing the list of all the consultants in your area. Then Click on the « choose fields » tab.

This window allows you to choose the fields that will automatically be inserted to the final document when you execute it and choose your consultant – see below.

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Using Database files (DBF) to enter Consultant's names to letters

6) You choose the field name and then click the **+**key to copy it into the top window.

You can add free text e.g. a space between fields using the « insert text

» box. In

this example we are going to add the consultants title, first name and surname to

the executed document in the place indicated above.

7) Click OK

8) Now click *file\save as* and name the template = « Quicklet_DBF.cvs »

9) Now open a patient file, if not already open. Press Shift+F2 or click on the cogwheel

icon to execute the template « Quicklet_DBF.cvs »

10) You are immediately presented with a window containing the *list* of the consultants.

You only job now is to choose a consultant and click **apply**.

11) The Title, first name and surname of the consultant will appear in the letter.

12) Note that you can always at the final stage choose your own fields to be

entered in the final document by manually selecting the fields in the above

screen shot and clicking « inset » to insert each field. This was the only way to

do things in previous version of HEALTHone™ but it is cumbersome.

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5.1 Mail Merge and Mail Shots

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Creation of a template and send it to several destinations

Insertion of the mail shot fields



To create a template that you want to send to several places follow the procedure described below :

1) From the main **HEALTHone™** file menu, choose File\New\Template
2) Arrange the text and place the cursor where you want to insert a field
3) Click the button to insert a mail merge field or use the HotKey Combination Shift + Ctrl + Q. This button is the third button from the right in the toolbar of the canvas editor.

4) Choose external database as the source. The external databases should be located in the directory `honestwin\dbf`.

If you want to use an MS access database you should also choose the table that contains the fields you require,

5) The dialogue displays the available fields in the selected database. Simply select the field you require and press the OK button. If you require more than one field press « insert ».

The Mail Merge fields are entered to the template as - {MailMerge :

6) Repeat the operation to add more fields. Only one external file is used, you can't change the database file to insert a second field.

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Note: You can always change the format of the field, for example the font, colour etc.

Inserting the field « Carbon Copy »

When sending a letter to several people, it might be good practice to include all the recipients as « **CC** ». This can be done easily.

Click on the down arrow next to the Mail Merge icon and choose « Insert carbon Copy field.

Double click on the fields you want to include in the carbon copy field. You can also add free text here.

Click OK.

The formula above contains the consultants name and Hospital.

Insertion of destination field to the patient file

HEALTHone™ can remember the names of the people that the letter was sent to and save this information into the patient file
To do this you must add a « destinator » field, available in the same drop down menu.

As with the CC field, you add the fields you require into the « destinator » field and click OK.

Note: The destinator fields are used only when saving the letter to the patient file.
They are deleted from the document during the merge.

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5.1 Mail Merge and Mail Shots

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Inserting analysis fields

This is exactly the same as inserting an analysis in any document template. It allows you to extract some data from the patient file for the document.

Saving your work

Your template is now ready, save it.

Here is an example of a template, including the mail merge fields, and analysis extractions

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from the patient file.

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Sending a letter to several destinations

- 1) Open the patient file
- 2) Click on the template execution button (Shift + F2)



3) Select a Mail Merge template that you want to use. On opening the template all the HCR analyses will be executed **with the exception of the Mail Merge analyses.**

4) Select the Mail Merge button in the top tool bar of the template editor. This is the second last button on the top toolbar of the template editor.

5) The database that you choose when entering the Mail Merge fields is opened. You choose, from this list the addresses you want to send the letter to. You can double click on the name in the bottom panel to send it to the top (selected) panel.

In this list you can select the name of the destination from the bottom grid « All records ». Press Enter or double click on the name to select.

The selected destinations appear in the top grid. You can remove a selected name by using the right mouse click.

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5.1 Mail Merge and Mail Shots Page 10 of 15 ***Sending a letter to several destinations cont.***

- 6) Click OK to execute the template, one for each destination..

- 7) To Archive the document in the current transaction of the patient file click and select « in HCR as multimedia object »

You get the same dialogue if you close the executed document directly by using the top right hand X of the text editor or by using the Combination keys Ctrl+F4

- 8) Select the item name with which you want to save the document
Note : You can set a default item name to store archived documents, by using the main menu tools\Options\Template

- 9) You can change the name of the document, add a comment, add a severity index so it appears in red in the file or make it « display protected » so that nobody except the person who created the document can view the document.

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Sending a letter to several destinations cont.

The document is saved in the patient file. To open it from there you should double click it.

If the template contained the field « destinator » these names will be saved to the patient file also under the item « document sent to »

Note: Please remember that when you execute a mail merge template the « Mail Merge » fields will not be immediately executed. You have to click on the « merge » button **after executing the template.**

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Sending a mailing to a selection of patients

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You can choose the recipients for your letter from several lists within **HEALTHone™**

- The Patient selector
- The « Action Plan » tab in the patient selector
- The result window of a DWH analysis
- The relevant billing summaries

In this example we will do a DWH analysis to find all males over 50 who have not had a cholesterol check in the past 12 months. The details of creating DWH analyses are described elsewhere ; This is the DWH screen with the analysis defined :

Click on execute and you get this :

Now we can highlight this list and send a letter to each of them, personalised.
Click the highlighted button and each of these patients gets a plan of action automatically.

You can now create a Mail Merge Document from the « Action Plan » tab in the Patient Selector. (You can also do this directly from the DWH analysis result screen !)

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5.1 **Mail Merge and Mail Shots**

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Click on the Mail Merge Button on the bottom of the patient selector screen.

Choose your mail Merge letter as you have already created. A letter is shown, one for each patient in the list with the correct salutations, for example, and is ready for printing.

Working with a Dictaphone:

The doctor working with a Dictaphone may have to slightly modify his diction to be understood. It is much easier to pronounce the recipients at the end of the session.

- 1) Click on the icon to execute a template (= shift + F2)
- 2) Choose the template that you wish to execute. All the analyses are executed **except** the Mail Merge analyses that appear in the text editor window.
- 3) Type the letter from the Dictaphone
- 4) Choose the merge button again from the toolbar at the top of the text editor window.

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Select the destinations from this list as above.

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5.1 Mail Merge and Mail Shots

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Options

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In the main menu bar of **HEALTHone™** select Tools\Options and then select the « template » tab. It is here that we can define various options relating to templates and Mail Merging.

Template Selection

You can select here where your templates are situated. This is important in a network environment where, if a someone makes a change to a template, or creates anew template, it will not be available to others unless they all have the same path entered here.

Archived Document

Here you can name the item that is used automatically when archiving a document to the patient file. Use this option in order to avoid being asked for a name every time you archive a document

Tick the check box « close the editor after archiving.. » to automatically close the editor after archiving.

Mail Merge

You can define the number of copies of the first page to be printed.

Printer Configuration

- Here you can choose the printer that should always be used to print your document templates. This setting will over rule the windows default settings.

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5.1 Mail Merge and Mail Shots

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5.1 Miscellaneous features Page 2 of 11

Patient Selector - Age

HEALTHone™ Version 5.0 has added two new fields that can be viewed



in the patient selector :

Patient AGE
Patient category

Patient age:

Viewing the patient age will give you significant advantages when filtering patients from the patient selector.

To view the patient age, or any other available field, in the patient selector, you should click on the « configure » button at the bottom of the patient selector screen.

At the bottom of the resulting list is the « patient age » field. Tick this.

Likewise, you can add the field « patient category » to the columns of fields available in the patient selector. See the paragraph about the new « GMS editor » to see the value of using the patient category.

Using this column you can immediately select patients of any age, less than any age, greater than any age or between two ages. Use the following operators :

>
<

>xx >yy Note the syntax here ; >xx(space)<yy. Think of this as « greater than(=>)XX

AND (=space) <(=<)YY

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GMS Editor

We have a new concept of the GMS number for 5.0. In this version you are encouraged to enter **only valid GMS numbers** to the item « GMS number ». We use the item « patient category » to display which category the patient belongs to : for example, GMS, GMS DVC (**D**octor **V**isit **C**ard), PP, Visitor, Temp, etc. The two items are linked in HEALTHone™ such that when you edit one, you are compelled to edit the other.

If you create a new patient and enter the item « GMS number », you will be presented with the following screen.

If the patient is a GMS patient, or a GMS DVC patient (see drop down list), you will be able to enter a valid GMS number.

Otherwise the GMS number box will not be available for data entry

Below is some of the list of patient categories available by default :



This list is defined in a DBF (database) file which is delivered with HEALTHOne™.

This means it comes by default with all new installations. However, you can add to this list by clicking on the little edit box next to the drop down list as in the screen shot above. This is described later.

The name of this DBF file is « GMSEditor.MDB ». It will normally be located in the shared configuration directory\set1\dbf directory. If you are not using a shared configuration (no network), then it will be in c:\Honewin\DBF directory.

The advantages of this system is that the GMS number is used solely for the purpose it was designed for ; you can see at a glance from the patient selector, your list of GMS patients, DVC patients PP's etc. by using the « patient category » column.

Existing HEALTHOne™ users who are upgrading to version 5.0 or 5.1 may, if they wish, convert all their records to the new system. To do this you need to use the HCR Edit Tool – see the 5.0 manual for details.

Note: The use of the GMS editor function is optional ! Click on tools/options to see the possibilities. If it is unchecked, then the GMS number and patient category become un-linked.

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5.1 Miscellaneous features Page 4 of 11

GMS Number Editor – converting 3.7 records

Users of all previous versions of HEALTHone™ have always been using the item « GMS number » to record not only all valid GMS numbers, but also all patient categories such as PP, visitor, NHS etc.

HEALTHone™ version 5.0 introduces a link between the item « GMS number » and the item « patient category ». This is described above. Here we describe the method of converting all your 3.7 patients to the new system.

HEALTHone™ comes with a very useful tool called the « HCR Edit Tool ». This tool can be used to change things in all your patient files in one go. One of these is to examine the contents of the item « GMS number ». If this item contains a valid GMS number it leaves the item alone and adds a new item called « patient category » with the content « GMS ». Thus every GMS patient will have two items as follows

GMS Number is retained if existing number is valid.
Patient category item is added

If, however, the GMS number item contained a value other than a valid GMS number, HEALTHone™ moves the content of the item to the new item « patient category ».

NB: The contents, if any, of an existing item « patient category » will be deleted.

GMS Number is removed.
Contents of GMS no. Moved to patient category item.

Using the HCR Edit Tool:

Click on the windows start menu and then all programs – HEALTHone™ 5.0 – HEALTHone™ Tools – HCR Edit Tool. You are then asked to log in to the relevant source - do this. You are presented with a screen with several options

Choose the option « Update GMS numbers ». The next screen will ask you to confirm your choice. Remember that all your patient files will be changed. This has implications for the next time you synchronise! The process will take time, up to an hour if you have 10,000 patients

The result will change both the items « GMS number » and « patient category » as shown

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Some new features in the patient file:

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If you open a patient record you can see the following new icons/features available in version 5.0:

1. Direct insertion of a Basic Medical transaction
2. View family records
3. Refer transaction
4. Insert prevention template
5. Display all the patient data in chronological order

1. Direct insertion of a Basic Medical transaction

This is a quick way of entering a new BMI transaction. Simply click on the button next to the « new transaction » button on the left hand side of the open patient record screen, or hit the Hot Key Combination Ctrl+J

2. View family records

This feature allows you to bring up a list of family members when you have a patient file open. For this feature to work you must, of course, have given each of the members of the family a number by entering the number in the admin page in the item « family number »

When you click on this button you can see a list of all members of the family:

This screen gives you several possibilities:



- i. You can open any other family file, view it, and edit it, while the original file remains open and available for further data entry.
- ii. You can view the amount of money owed by each family member and the total owed by the family.

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3. Refer transaction

This function is only available if you use the « Multi user Appointments ». Multi User appointments are described elsewhere. However, it is enabled by checking the relevant box in the HEALTHone™ main menu item tools – options – appointments.

You can refer the current transaction to another team member by clicking on the « refer transaction » icon on the toolbar at the top of the right hand panel of the medical section of the open patient record.

When you click on this icon the following dialogue box opens:

Now double click on the recipient - a further dialogue will appear:

When you click on « save and exit », you return to the patient file. The message then appears in the multi user appointments messages section, in Dr. Mary's inbox. When Dr. Mary sees the message she can go directly to the patient file and the relevant transaction, with one key stroke.

4. Insert prevention template

The use of the prevention module, including prevention templates, is described in the section on «action plan»

However, you can insert a prevention template at any time, from within the patient record by clicking on the icon on the toolbar at the top of the right hand panel of the medical section of the open patient record.

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When you click on this icon the following dialogue box opens:

The actual prevention templates are user defined and can be created in the configuration tool. This process is described in the section on the «action plan»

5. Display all the patient data in chronological order

This is an extremely useful new function in HEALTHone™ version 5.0. It allows you to view the patient's entire file in one « page » that you can

scroll through.

You can easily search all the data for any text you like.

You can access this feature by clicking on the icon « display all data in chronological order » which is on the main HEALTH*One*™ toolbar:

When you click on this icon you are presented with the following screen:

You can now search all the data in the patient record simply by typing some text in the search box:

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You will see all the instances of the searched for text including the dates involved. This can be extremely useful for finding any information you wish in the patient's file.

6. Transaction Naming

HEALTH*One*™ has always used an associated list with the « transaction name » to distinguish between different types of transaction. For example, consultation, visit at home, drug prescription, obstetrics, lab... This list is created in the configuration tool.

Open the configuration tool. Click on <file – open – transaction name> or use the Hot Key combination « Ctrl+T »

The screen below is the normal dialogue presented when you are adding terms to the list of « transaction names ». However the check box « show all terms » is new to HEALTHone™ version 5.0.

If this check box is ticked you have access to all the HEALTHone™ items and contents for use as an associated list to the « transaction name », when creating a new transaction for a patient.

7. Transaction Comment

Furthermore, we now have a new transaction attribute that we can use to extend the naming of transactions. Every transaction now has a new attribute called « transaction comment ». This attribute allows flexibility if you want to have additional methods of filtering the list of transactions in the left hand panel of the patient record. We might use the « transaction comment » field if we want to use other clinical information, not available in the list attached to « transaction name »

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If you organise yourself you can have an intelligent list of things you might put in this window that allows you to see at a glance additional information relating to each consultation by using the transaction filter.

In the transaction view above we have added a comment to 4 transactions – Haemoglobin, ECG, 24 hr BP monitor and Dexa scan. We can now filter the transactions on, for example, dexa scans, so that we can more easily look up all transactions containing dexa scans.

Although we can enter free text directly to the item « comment », it may be more useful to create an « associated list » that we can consistently use for specific purposes. We can do this by using the configuration tool.

Note: We now also have the possibility to use **any** HEALTHOne™ term in the list of **transaction names**.

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Let us now open the configuration tool and have a look at how to use an associated list with the transaction comment.

First you need to create a new associated list. You can use any item for this list. However we suggest you use an item that you do not use for any other purpose. There is no need to use the HEALTH*One*™ item « comments » for the purpose, but you may of course do so, if you wish. You should remember though, that the item you use will have this list in the normal HEALTH*One*™ item associated lists.

In the example below I am have attached an associated list to the item «comment measure».

Click on the menu item action – assign list to transaction comment

Open a patient record in HEALTH*One*™ and create a new transaction. Click on the drop down arrow next to the « comment » attribute.

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Own Notes