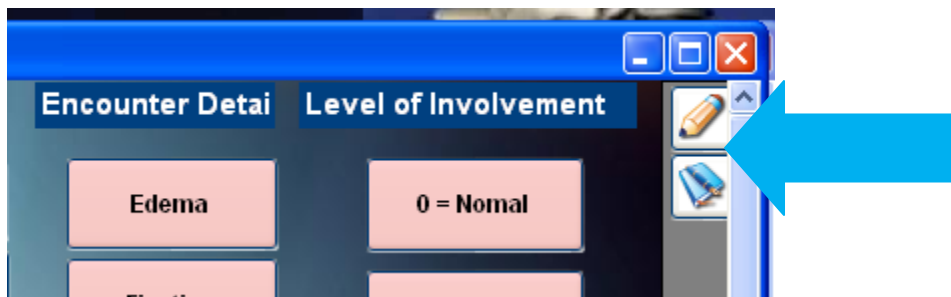


Mechanics of Customization

Now that you have spent some time looking through the EMR categories and types of buttons that can be created or deleted, you are ready to begin the mechanics of customization. You can also receive help on customization with the ClinicPro training technicians.

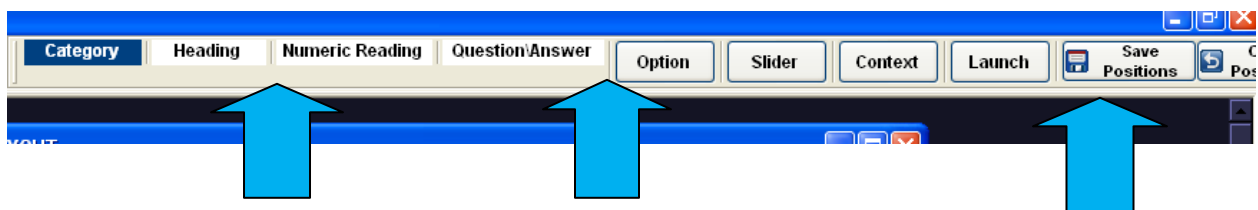
The EMR template “Tool Builder” is located in the upper right hand corner of your EMR screen. You will have to be off the Encounter Notes screen to access this feature. This view is from the Daily Note screen:



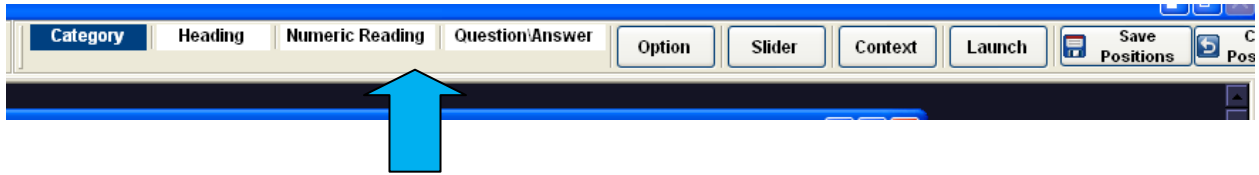
There are the pencil and the book icons.

If you would like to add buttons to the EMR

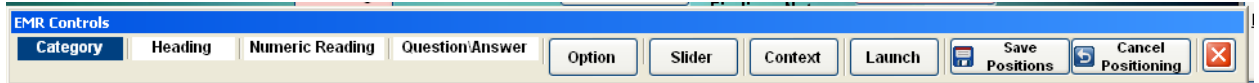
Click the pencil icon. This will enable the toolbar in the upper right portion of the screen.




The toolbar will be better accessed by pulling it out of the spot it displays; at this view you cannot get to the entire bar. Click on a gray area of the toolbar:



Drag the toolbar down on your computer screen so that the entire bar is visible:



As stated earlier in the training guide, there are many options available for you to choose a type of button to add:

Category  Looking at the EMR template, you will see that the Categories are the blue labels which group the “context” or “options” buttons. Here is an example of two different categories, “Chief Complaint,” and “Pain Scale”:

Chief Complaint <input type="text" value="Neck pain"/> <input type="text" value="Radiating into right arm"/>	Pain Scale <input type="text" value="Pain scale: 0 of 9"/> <input type="text" value="Pain scale: 1 of 9"/> <input type="text" value="Pain scale: 2 of 9"/>	<p>“Chief Complaint” is an inclusive category.</p> <p>“Pain Scale” is an exclusive category</p>
---	--	---

Click directly on the **Category** button, hold down the mouse button, and drag the category button out, and on to your template. This box will display for you to decide the type of category you are creating:

Add Category

Categories are necessary to group the controls together. When the EMR is printed the categories allow the recorded values to be grouped together correctly

<input checked="" type="radio"/> Inclusive Option <input type="radio"/> Exclusive Option <input type="radio"/> Question / Answer <input type="radio"/> Launch Control (for new form) <input type="radio"/> Numeric Reading <input type="radio"/> Context Controls	<p>Inclusive option means that more than one button can be clicked for this category. For example a patient may have dizziness, fatigue and neck pain</p>
--	---

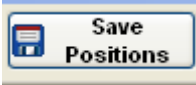
Once you choose the type of category, click “Select this Category.”



Enter the name of the category. It will display on your template:

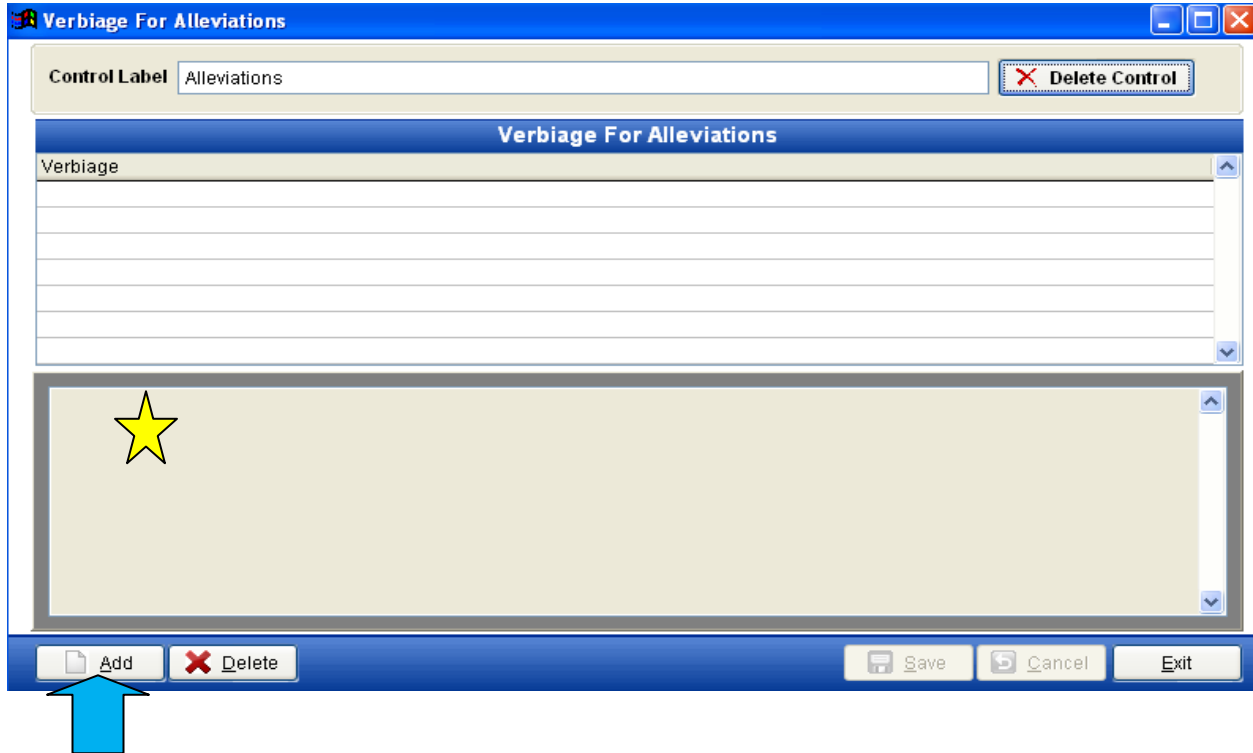


Use your arrow keys, located between the alpha and numeric keys, to arrange this button on the screen and place it appropriately. When doing this, the letters will most likely shift in the category label, or disappear from sight. Don't worry, we will attend to this later. Fix the position of this category button and amend the size and shape to suit your tastes. To stretch the button wider, click on the right or left side border of the button, hold your shift key down, and use the arrows to widen or make the category button narrow. To make the button longer, click on the top or bottom edge, and utilize the shift key and arrows to redesign the button.

Once you are satisfied with the position and design of the category button, click the “save positions” button  on the toolbar. Close the toolbar.

The label name may have disappeared entirely or shifted so that it is unreadable. To see your button complete, as you intended, click the “Exit” button on the right margin and move away from this screen. Once you click back on to the screen the button will be in order. Now you are ready to add context and option buttons under this category.

If you wish to add verbiage to the button, or buttons you create, click the book icon, and then click on the button that needs verbiage. Doing this will enable the verbiage screen to display:



Click the “Add” button and begin typing in the text portion of this screen (marked by the star). This will add the verbiage you wish to print out on the encounter notes and report. Once you have completed the verbiage, click “save.” This will add the verbiage to the lined area of the screen. If you want to add more verbiage options, simply repeat the process.

You can also amend the name of the button in the Control Label box, or delete the entire button in this portion of the screen:

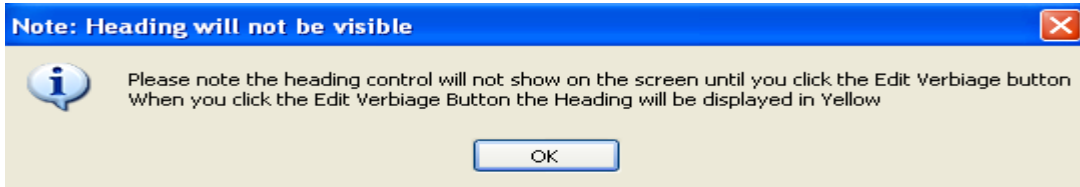


If you do use the “Delete Control” option, the button will vacate the EMR and retrieving it will be impossible. You will have to rebuild the button.

Heading

Heading

The Heading button creates a heading that prints out on the encounter notes and reports. When you drag the heading button out of the toolbar, you will see a message reminding you that this button will not display until you enable the “Edit” mode. It is not a button you will see during normal EMR operation.



Click “OK.”



Use the drop down arrow to select the screen which will now contain the heading you are trying to create.

Another box will display where you can add the new Heading name:



Click “Save.”

There will now be a field added to this EMR template with the name of the Heading you created for this template. You can use your arrow keys to maneuver this heading to an appropriate location on the template. Remember that once you click “Save Position” on toolbar, and then close the toolbar function, this heading will disappear. You will now only see the new Heading when in “Edit” mode.

The heading works to display on the encounters notes screen. In this example, we chose to create a new heading on the Daily Note screen which already has a heading called ‘Encounter Detail.’ The new heading we created, “Initial Exam”, will now generate on the encounter note:

The screenshot shows the EMR interface for patient SMOKEY BEAR. The main window displays the encounter details for ProHealth Chiropractic, including the address (200 North 15th Street, Suite 15, Corsicana, TX 75110) and patient information (SMOKEY BEAR - 00000005). The diagnosis is listed as 83903 C3 SUBLUXATION; 83904 C4 SUBLUXATION; 83901 C1 SUBLUXATION, and the visit date is 01/15/10. The encounter is identified as an Initial Visit on 01/14/2010, visit 4 of 4. On the left sidebar, there is a list of encounter headings: 'Initial Exam' and 'Encounter Detail'. A blue arrow points to the 'Initial Exam' heading, indicating its position in the template. Below the headings, the encounter notes are displayed, starting with 'C2 vertebra: Examination of his spine revealed hypermobility of the vertebrae.' and 'C3 vertebra: The patient is experiencing hypomobility of the vertebra. This means that the in a normal spinal configuration.'

If you wanted to remove the already existing heading “Encounter Detail,” then from the Daily Note screen you will advance to “Edit” mode by clicking on the “Book Icon.”

Now click on to the heading “Encounter Detail”. The verbiage box will display that will allow you to “Delete Control.”

Numeric Reading

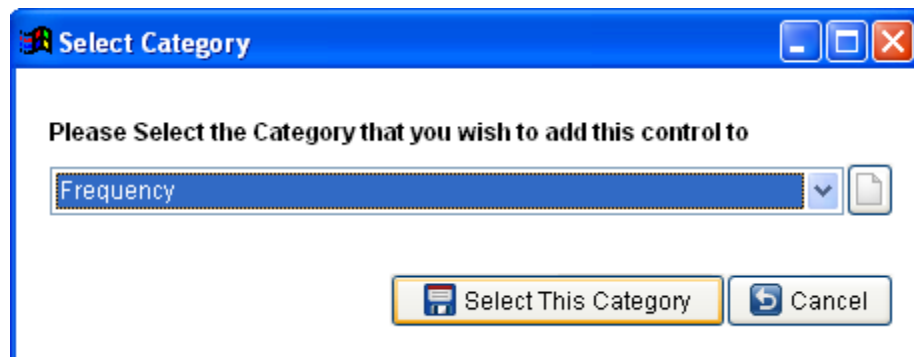
Numeric Reading

You may want to revisit the training manual where we discuss this feature.

A Numeric Reading allows you to record values using the on screen numeric keypad. First you will need a category to contain this feature. Once you create the Numeric Reading category, then you can add the Numeric Reading buttons.

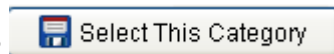
Click the “Pencil Icon” to enable the tool bar; then drag this tool bar away from the top of the screen so it is fully accessible.

Click on the Numeric Reading button and drag this button on to the EMR screen. A box will display:



You are being asked to choose the category that will contain the numeric readings you want to create. In this example, we chose the Frequency category that is found on the Daily Note screen. If you want to use a category that is not already designed on the template, you will have to first create that category.

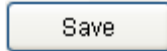
Click “Select this Category”



Another box will display asking you to name your label:



Click “Save”



The label you created, in this example “Readings,” will display on the EMR template in black lettering along with an empty box that holds the numeric value. At first, your new label and numeric field will most likely appear on the screen in a less than perfect location, like this:



These items, the label and the numeric box, move independently of each other.

First, click on the label and use your mouse and arrow keys to place this label appropriately. When the label is where you want it to be set, click the “Save Positions” button on the tool bar.

Close the tool bar



Now, **exit from this EMR screen**. For this example we will be leaving the Daily Note screen.

Reopen the template you are customizing.

Reopen the toolbar using the “Pencil Icon.”

Click on the numeric reading box and use your mouse and arrow key to place this box appropriately. The label can still be moved if you reconsider its position.

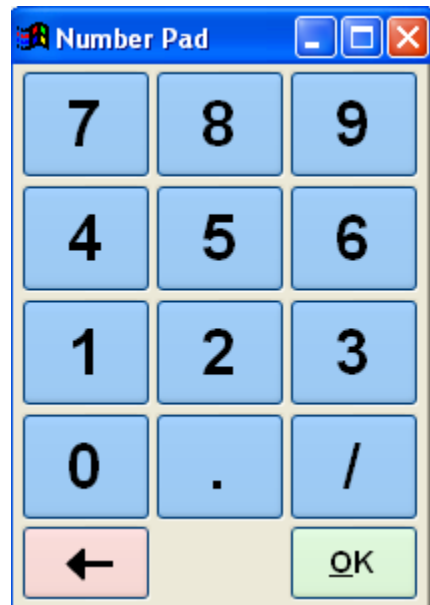


Click “Save Positions” when satisfied with placement of your items.

Close the tool bar.

Opening and closing the EMR template seems unnecessary and, at times, inconvenient. It is currently the only way to present the changes to the EMR database for customization. Remember that this time spent getting your template customized for your style of practice will pay off tremendously in the end.

Double-clicking on the numeric box will display a numeric reading pad to allow you to enter the values necessary:



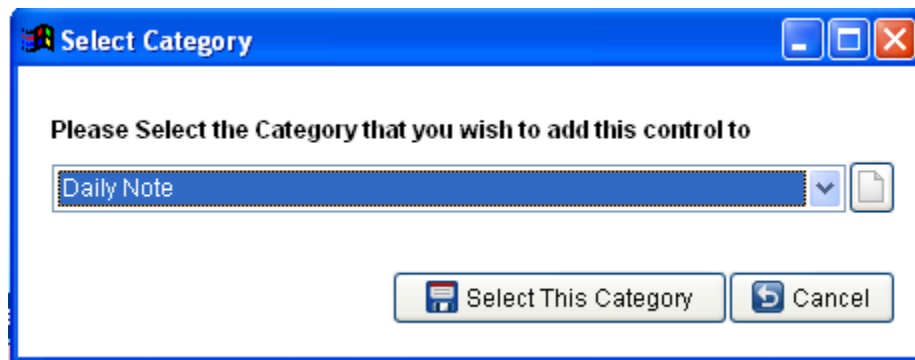
Question / Answer

Question/Answer

Using the Q & A button will allow you to add option buttons to embellish this aspect of your reporting.

Click the **“Pencil Icon”** to enable the tool bar; then drag this tool bar away from the top of the screen so it is fully accessible.

Click on the **Q & A button** and drag this button on to the EMR screen. A box will display:



You are being asked to choose the category that will contain the question and open ended answer field you want to create. In this example, we chose the Daily Note category because we are adding this feature to the Daily Note screen. If you want to use a category that is not already designed on the template, you will have to first create that category.

Click **“Select This Category”**

Select This Category



Enter the question you want to add to the template. In this example we chose to add **“How are you feeling today?”** This will display on the template and a field for the open ended answer will also be created.

Click “Save”

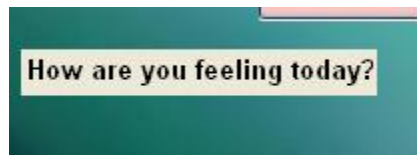
A rectangular button with a thin border and the word "Save" centered inside.

The question you developed, along with the field for the open ended answer will now display on the EMR screen, most likely in a less than perfect location. Look below at the example of the Q & A we developed for training purposes. The type is barely visible and the field is displayed across the template.

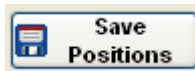


Double-click on the label “How are you feeling today?”

Now you can use your mouse and arrow keys to maneuver this to a blank section of the template. Hold the shift key down while using the arrow keys, this will allow for expansion of the field so that the entire text will display.



Click “Save Positions”



Close the tool bar.



Now, exit from this EMR screen. For this example we will be leaving the Daily Note screen.

Reopen the template you are customizing.

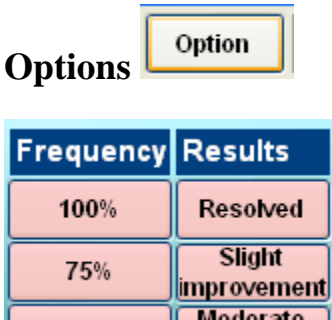
Reopen the toolbar using the “Pencil Icon.”

Click on the answer field box and use your mouse and arrow keys to place this box appropriately. You will not have to size the box to accommodate the open ended answer. When operating in the EMR in normal mode, this box, when clicked, will pop up a comments box for you to type the open ended answer. You will have up to 999 characters.

Click “Save Positions” when satisfied with placement of your items.

Close the tool bar.

Options



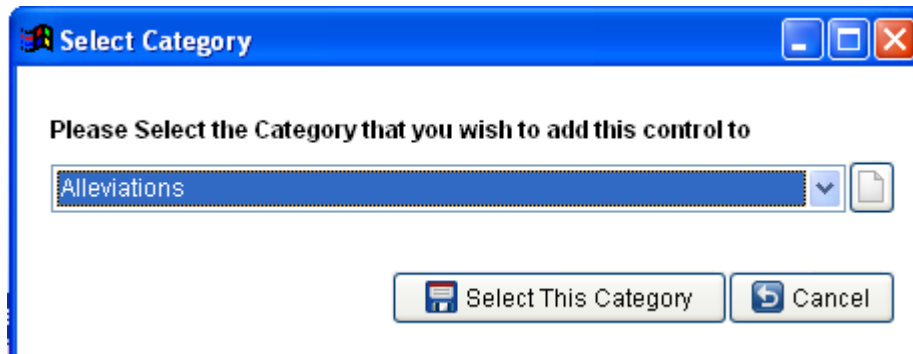
Option buttons typically display in salmon color on your EMR templates. They are used in conjunction with the Context buttons to describe the body area or rate pain, set frequency, or anything else you need to embellish your encounters like doses of medication.

Here are examples of the option buttons. Option buttons set under categories that are either inclusive, or exclusive.

Click the “Pencil Icon” to enable the tool bar; then drag this tool bar away from the top of the screen so it is fully accessible.

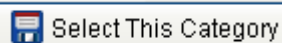
Click the “Option” button and drag it on to the EMR screen. A box will display.

You are being asked to choose the category that you wish to use add the option button. If you wish to add an option button to a category that does not currently exist, please create that category first.



On the Daily Note screen, we chose to add an option button to the “Alleviations” category which is an inclusive option.

Click “Select This Category”



Another box will display asking you to name the option we are creating:



Click “Save”

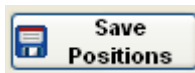
A rectangular button with a light blue border and the word "Save" in the center.

The option you created will now display on the EMR screen, most likely in a less than perfect location.



Click on the new **Option button** and use your mouse and arrow keys to position this button where you would like it to be displayed.

Click “Save Positions”



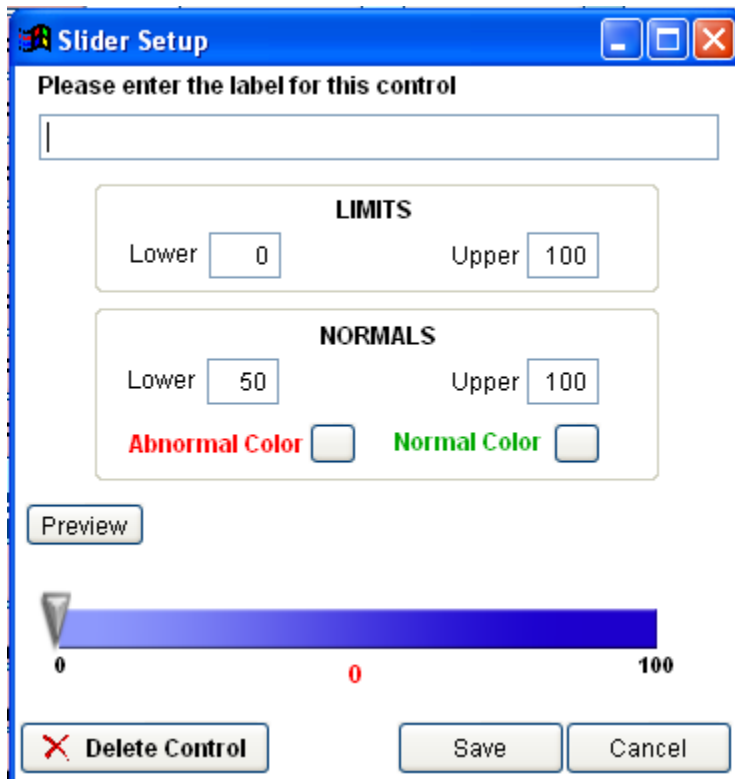
Close the tool bar.



Slider



This custom feature will produce a mechanism that will chart a measurement through a 'slider' feature.

A dialog box titled "Slider Setup" with a blue title bar. It contains a text input field for a label, two sections for "LIMITS" and "NORMALS" with "Lower" and "Upper" value inputs, two checkboxes for "Abnormal Color" and "Normal Color", a "Preview" button, a slider control with a blue bar and a triangular handle, and three buttons at the bottom: "Delete Control", "Save", and "Cancel".

Please enter the label for this control

LIMITS
Lower 0 Upper 100

NORMALS
Lower 50 Upper 100

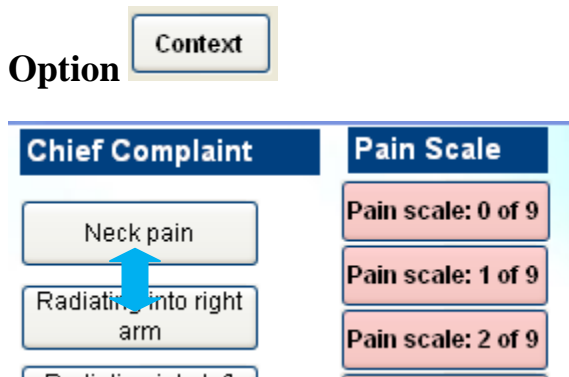
Abnormal Color Normal Color

Preview

0 0 100

Delete Control Save Cancel

The Slider feature is set in place in the EMR to interact with some future functionality. At this time this feature is not active in your system



In most cases, the context controls tell you where something is happening. The context controls might list various body parts, or in another scenario, they might list symptoms.

Click the “Pencil Icon” to enable the tool bar; then drag this tool bar away from the top of the screen so it is fully accessible.

Click the “Context” button and drag it on to the EMR screen. A box will display.



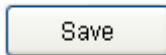
You are being asked to choose the category that the Context button will be added to on the EMR template. In this example, from the Daily Note screen; we chose to add a context button to the Chief Complaint category. If you wish to add a context button to a category that does not exist, please create that category first.

Click “Select This Category” 

Another box will display asking you to name the context button you are adding to the EMR Template.



Click “Save”

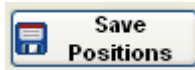


The option you created will now display on the EMR screen, most likely in a less than perfect location.



Click on the new **Context button** and use your mouse and arrow keys to position this button where you would like it to be displayed.

Click “Save Positions”



Close the tool bar.



Using the Context buttons and Option buttons can sometimes be confusing; this is why you will have training help from the ClinicPro training staff. Hopefully, the information on the following page might help clear up some initial questions you may have:

Let's see the Context and Option buttons in action:

From the Functional Assessment screen, let's look at the layout.

The gray buttons on the left are the Context buttons, or the context variable buttons. You would click the context variable first, the gray buttons, then choose the Option buttons that apply next. In this example, the option buttons are all exclusive, meaning that only one variable can be checked under Difficulty and only one under Pain.

There are screens which will allow more than one option variable to be chosen in conjunction with the context variable.

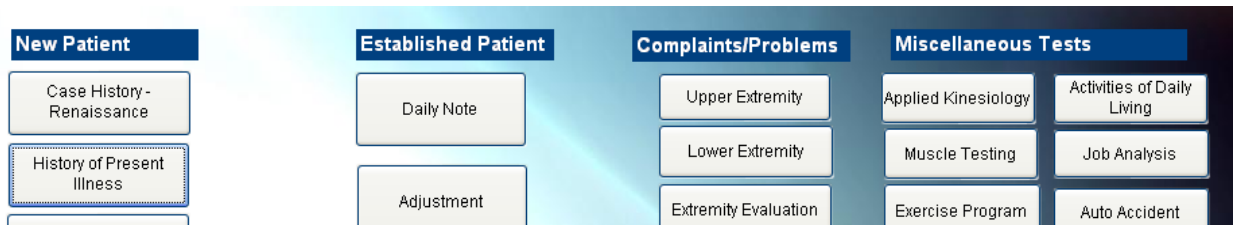
The Electronic Medical / Health Records program is designed to operate left to right, as you build your encounter notes. The ClinicPro EMR does not print the categories unless you include a report heading. The report heading is already included in the templates, you can see the heading when you click the "Pencil" icon and go into edit.

You also have to click an option variable button(s) with every context variable button or your encounter report will not print the context you are creating.

The final button on the customization tool bar is Launch:

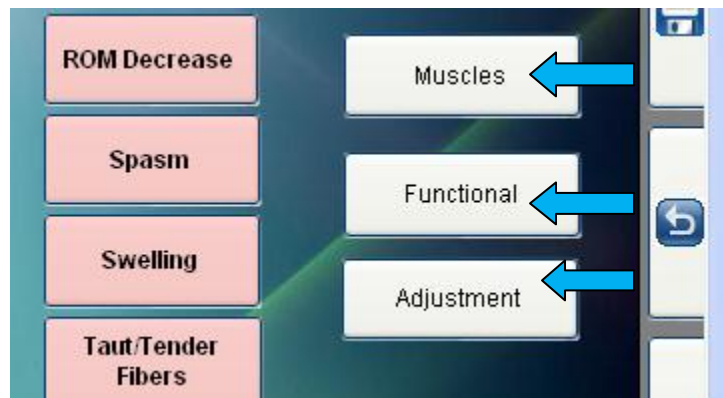


The Launch buttons function to move you from one EMR template to another, thus eliminating the need to navigate the program, screen by screen. Clicking on a launch button will immediately provide access to the exam, or page, you wish to use next.



This screen, the initial “Home” screen of the EMR program, consists entirely of Launch buttons. Clicking on one of these buttons automatically takes you to the exam, or template, in which you wish to work.

Another example of a Launch button is seen here on the Daily Note template:



The Muscles, Functional, and Adjustment buttons are all Launch buttons. From the Daily Note screen, you can quickly move to these different test templates. Launch buttons are completely customizable allowing you to add, or remove them, at will. This allows you to design the flow of your encounters.

The EMR Launch buttons will allow you to launch directly to an EMR template that is blank, and open to create, or an EMR template that already exists in the program.

Let's start with launching from the Daily Note template to an EMR template that is blank, thus allowing our own creativity.

From the Daily Note template we will create a Launch button to take us directly to a blank template to hold our own customized creation. We will call this template “Personal Injury”.

Click the “Pencil Icon” to enable the tool bar; then drag this tool bar away from the top of the screen so it is fully accessible.

Click the “Launch” button and drag it on to the EMR screen. A box will display.



We chose to add the Launch button to the Daily Note screen, so we selected the Daily Note option from the drop down arrow.

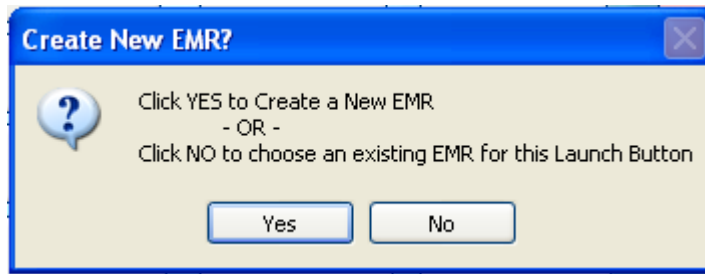
Click “Select This Category” 



Click “Save.”

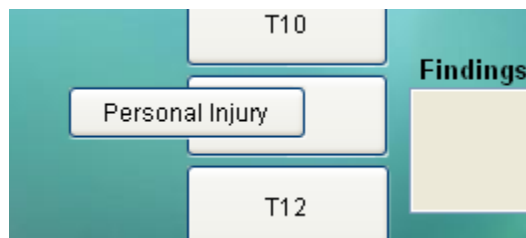
The Launch button will now reflect as “Personal Injury”

A box will now display that to determine whether this is a new EMR template, one that does not already exist in the program, or an existing EMR.



Since we are creating a new EMR template, we will click “Yes.”

The Launch button you created will now display on the EMR screen, most likely in a less than perfect location.



Click on the new Launch button and use your mouse and arrow keys to position this button where you would like it to be displayed.

Click “Save Positions”



Close the tool bar.



With the tool bar closed, the Launch now takes you to a blank template when you click on it. From there you can begin to build your new template.

From the Daily Note template we will create a Launch button to take us directly to an already existing EMR. We will call this button “Personal Injury,” and the template we will launch to will be “Auto Accident.”

Click the “Pencil Icon” to enable the tool bar; then drag this tool bar away from the top of the screen so it is fully accessible.

Click the “Launch” button and drag it on to the EMR screen. A box will display.

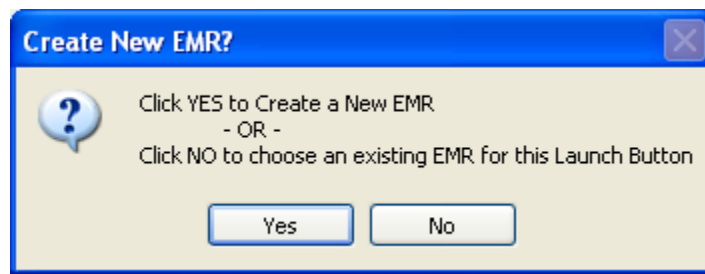


We chose to add the Launch button to the Daily Note screen, so we selected the Daily Note option from the drop down arrow.

Click “Select This Category”



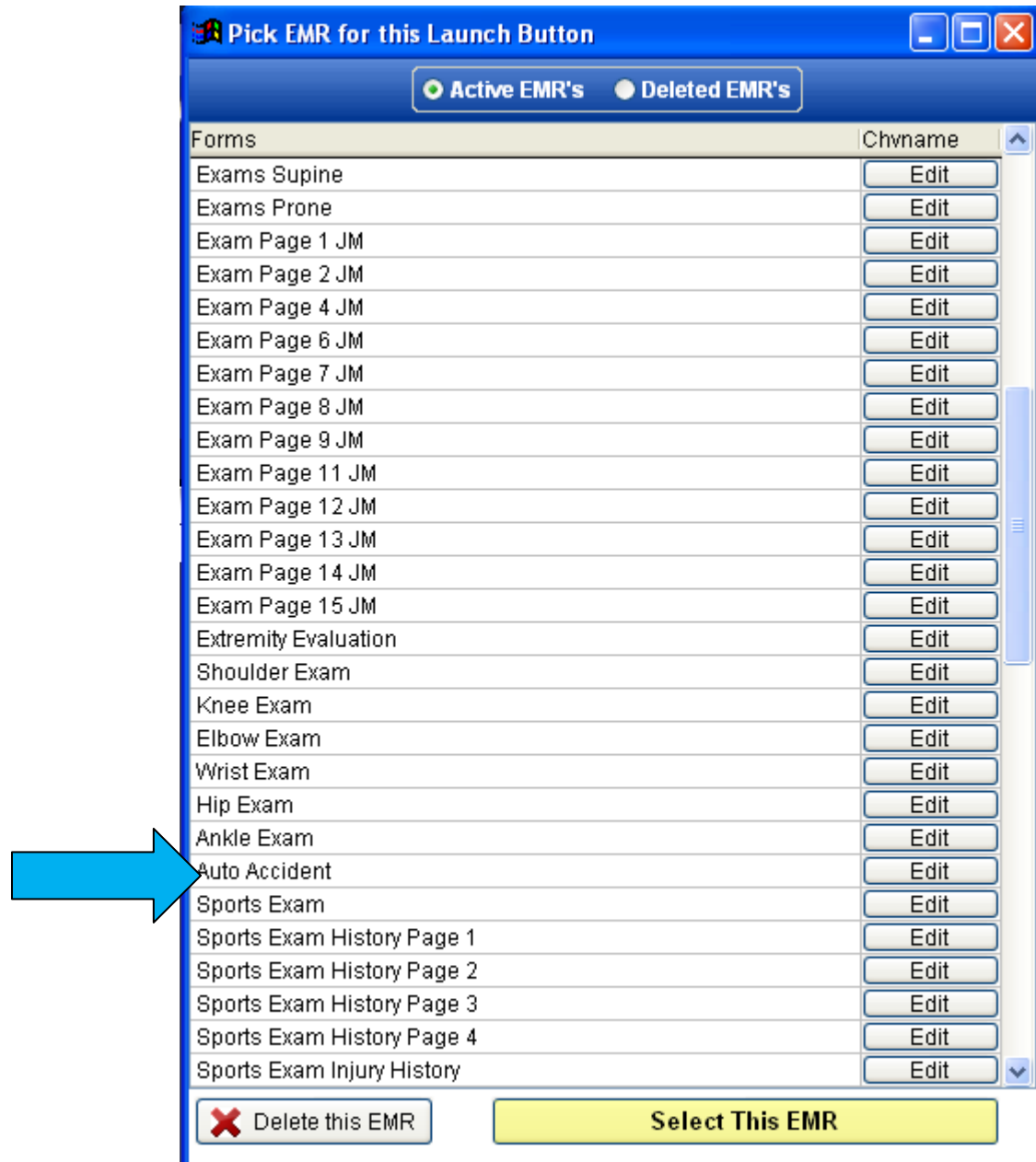
Click “Save.”



Since we are choosing an existing EMR, we will click “No.”

The Launch button you created will now display on the EMR screen, most likely in a less than perfect location.

The EMR template box will now display, we can choose the template from this list:



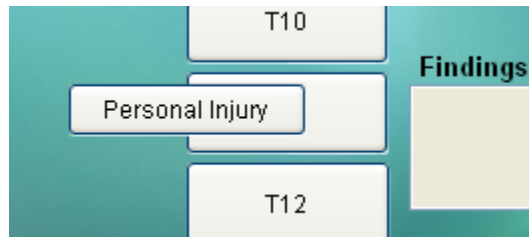
We decided to launch to the Auto Accident template.

“Click” on Auto Accident.



Click “Select This EMR.”

The Launch button you created will now display on the EMR screen, most likely in a less than perfect location.



Click on the new Launch button and use your mouse and arrow keys to position this button where you would like it to be displayed.

Click “Save Positions” 

Close the tool bar. 

With the tool bar closed, the Launch now takes you to the Auto Accident template when you click on it.

Auto Accident		
Occupant		
Driver	Passenger	
Hand on wheel?		
Right	Front	
Left	Left Rear	
Both	Right Rear	
Seat Belt Worn?		
Yes - SB	No - SB	
Direction facing at impact		
Straight ahead	Right	Left
Strike anything in the vehicle?		
Steering wheel	Windshield	Dashboard
Door	Window	Roof
Seat back bend or break?		
Yes	No	
How did you feel immediately after accident?		