Hope Matters

Medical Data Base

User's Guide

Introduction

This program is an interface with a data base which will hold and manage all patient records. The program will give Hope Matters employees access to enter, retrieve, and modify patient information in the data base. All prior forms and records storage systems have been integrated into this system as well as patient finance management. The goal is to streamline records management and make information easier to enter and retrieve.

User Types

There will be three different user types with different system permissions assigned to them. They are illustrated in the chart below. Your user type will be determined by your assignment and will allow you the access permissions you need to perform your job tasks. Your user type will be assigned by the system administrator(s).

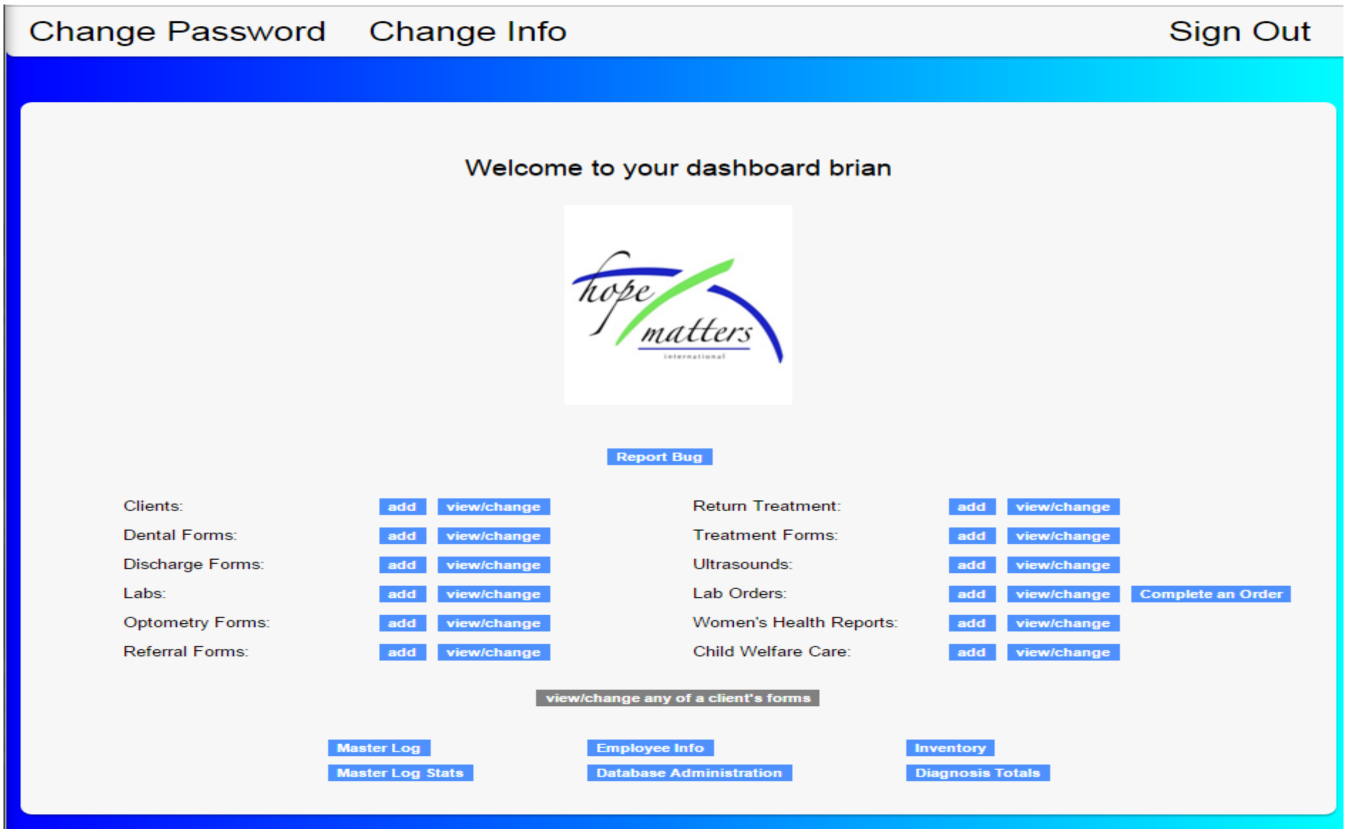
User type	Input/review ability	Finance access	Data base admin
Basic	Yes	No	No
Finance	Yes	Yes	No
Admin	Yes	No	Yes

Logging into the System

To access the system, click on the icon on your computer desktop. The icon is shown here on the right. This will bring you to the log in page. If you are accessing the system via internet during the beta testing period, you must use this link http://andrew-klassen.net:100/. In order for the program to work correctly you must be using a supported browser such as Google Chrome, FireFox, or Edge. A system administrator will assign you a user name and an initial password. The first time you log in, you should change your password so only you know it. Your password must be at least 8 characters and contain at least one upper and one lower case letter. Enter your user name and password in the screen as seen here on the left and click “Login.” This will take you to the “Dashboard.”

The Dashboard

The dashboard is the central hub of the system and is where you can access all parts of the system. It looks like this.



Notice it shows your name at the top center. If you don't see your name, someone else is logged onto the computer. You need to log off and log back in with your user name and password.

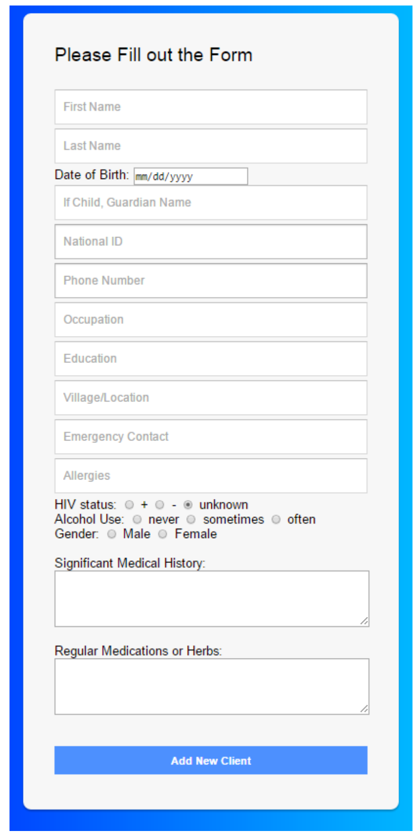
At the top left we see the words, "Change Password." Any time you wish to change your password, you can do so by clicking those words. Next to that is "Change Info." By clicking here, you can change your personnel information. At the top right are the words "Sign Out." Click here to sign out.

In the center of the dashboard is a list of all of the forms in the system. To add any of these forms, click on the word, "add" next to the form you wish to add. This will take you to a page where you can add this type of form. If you wish to retrieve a form to review or make changes, click on the words, "view/change" next to the form you wish to see. This will take you to a page where you can see forms already in existence and make changes if needed. If you wish to see all forms pertaining to a specific patient you can do so by clicking on "view/change all of a client's forms" at the bottom/center of the Dashboard. Below that we see "Master

Log," "Employee Info," "Inventory," "Master Log Stats," "Database Administration," and "Diagnosis Totals." These options will be reviewed later in this instruction manual.

Add View/Change Forms

The center of the dashboard lists each of the available form types. From here you can choose a form and either add a new one, or view or change an existing form. When seeing a new client, you must first add the client on the "Client" form. Once added you can create any other form type by clicking on the form and looking up the client. The Add and View/Change functions work similarly for all forms.

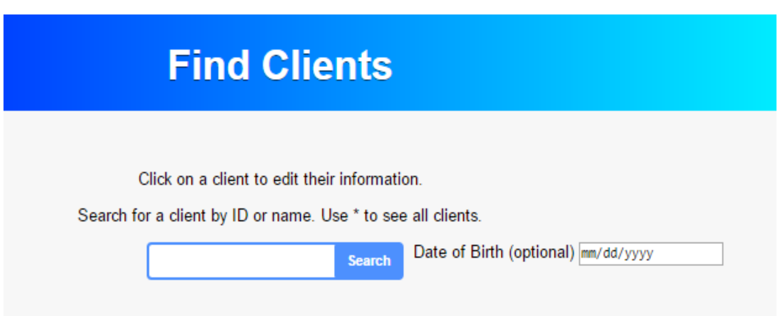


Adding a Client:

To add a client, click on the "add" icon next to "Clients." This will take you to the form shown on the right. Enter the information as requested by each box. When you are finished, click on the blue box at the bottom that says "Add New Client." The client information will be saved and the boxes will go blank. The computer data base will assign the new client a client ID number. The curser will return to the "First Name" box. This allows you to enter multiple clients. Note that the date of birth must be entered with a two digit month first, then two digit day followed by four digit year. This insures the information will go into the data base in a form it recognizes. If a box is not applicable, it can be left blank.

Viewing or Changing a Client:

To view or change a client's information, click on the "view/change" button next to the word "Clients." This takes you to a search page. If you know the client's assigned ID number you may retrieve their information by putting their number in the box and clicking on "Search." You may also search by entering either the first or last name of the client in the box and clicking on "Search." Adding a date of birth is optional. If you wish to see a list of all people listed in the data base, simply put an asterisk in the search box and click "Search." This will give you a list of clients listed by their order of entry into the data base from oldest to newest.



To see the client's information, click on their name and their client form will come up.

Other Forms:

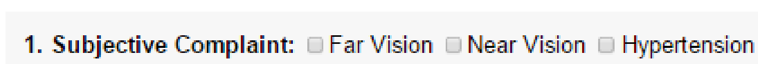
Once a new client has been added, you can add any of the other forms for that client. All of the other forms work similarly to the New Client form. You add and view or change them in the same way. On the top left corner of your dashboard will be the words "Form Selection." Click here to search for the same form on another client. When you complete a form, click on the blue "Submit" box at the bottom of the page to save it. Notice your user name will be shown above the "Submit" box.

To add a form, click on the word "Add" next to the name of the form you wish to add. You will be taken to a search page similar to the one shown above. Search for and choose the client you wish to add the form for. The form will come up on the screen with the client's general information on top. The client's information cannot be changed here. If you wish to change it, you must go back to the "Client" form.

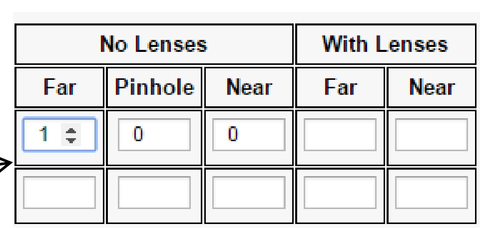
Inputting Information:

Text boxes: Many of the input fields are text boxes. In these boxes you can type the information however it is appropriate. The computer does not request any specific form

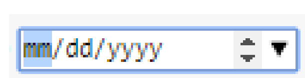
Check boxes or circles: If there is a check box or circle next to the options listed, click on the box or circle next to the choice or choices that are appropriate. Boxes allow you to choose as many as are appropriate. Circles only allow one choice.



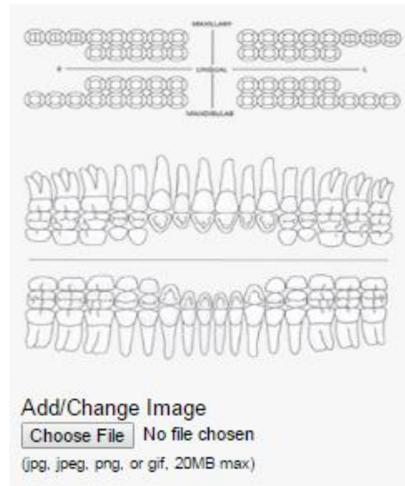
Number boxes: If a number is required, there will be a number box. Only a number can be entered into this box. You can type the appropriate number in the box. If you click on the box, arrows will appear. You can tap on the arrows to increase or decrease the numbers as shown here.



Dates: When entering a date, enter it with a two digit month first, then two digit day, followed by the four digit year. You can also click on the down arrow to the far right of the date box which will bring up a calendar. Click on the date of birth on the calendar.



Drop Down Menus: Some forms contain drop down menus. When you click on the box, you will be given a list of choices. You must pick from the choices given. The program will not accept any other input. This makes the input uniform and easier to retrieve statistics later.



Photos: Some forms such as the dental form or women's health report allow the inclusion of a picture such as a diagram. You can see an example from the dental form here on the right. To write on the picture first go to the copy of the picture/diagram you have in another file on your computer. Open the picture in "Paint" and make any neccesary marks or comments on the diagram. When you are done, save the file. Then come back to the dental form and click on the "Choose File" button at the bottom. This will take you to a search page on your computer. Choose the picture you just completed and save it to this form. The picture will then appear in place of the one on the form. If you do not already have a copy of this picture saved on your computer in another location, you can right click on the picture on the dental form and select "copy image." Then open "Paint" and hold down the "Ctrl" key and the letter "V." This will transfer the photo to "Paint." The save and transfer the photo as explained above. Depending on the internet browser you use, the photo may appear a bit distorted when saved on the form. This is normal. If you are reviewing the picture and need to see an undistorted copy, click on the words "Download Image" just below the picture. This will bring up a copy of the picture in an undistorted format.

Lab Orders:

Ordering Labs: To order labs, go to the lab orders form and add a form just like you would add any other form. When the lab form appears for the client you have chosen, select the lab tests you want to have performed by clicking on the square box next to the lab test desired. When you are done, click on the blue "Submit Lab Order" box at the bottom of the screen.

Completing Lab Orders: To input the lab test results, go to the "Complete an Order" box next to "Lab Orders." When you choose the client lab form, the labs requested will have a checked box next to them. Enter the lab test results in the boxes given. If the lab test does not have a check in the box next to it, it is not being requested and will not allow you to input any results.

Treatment Form:

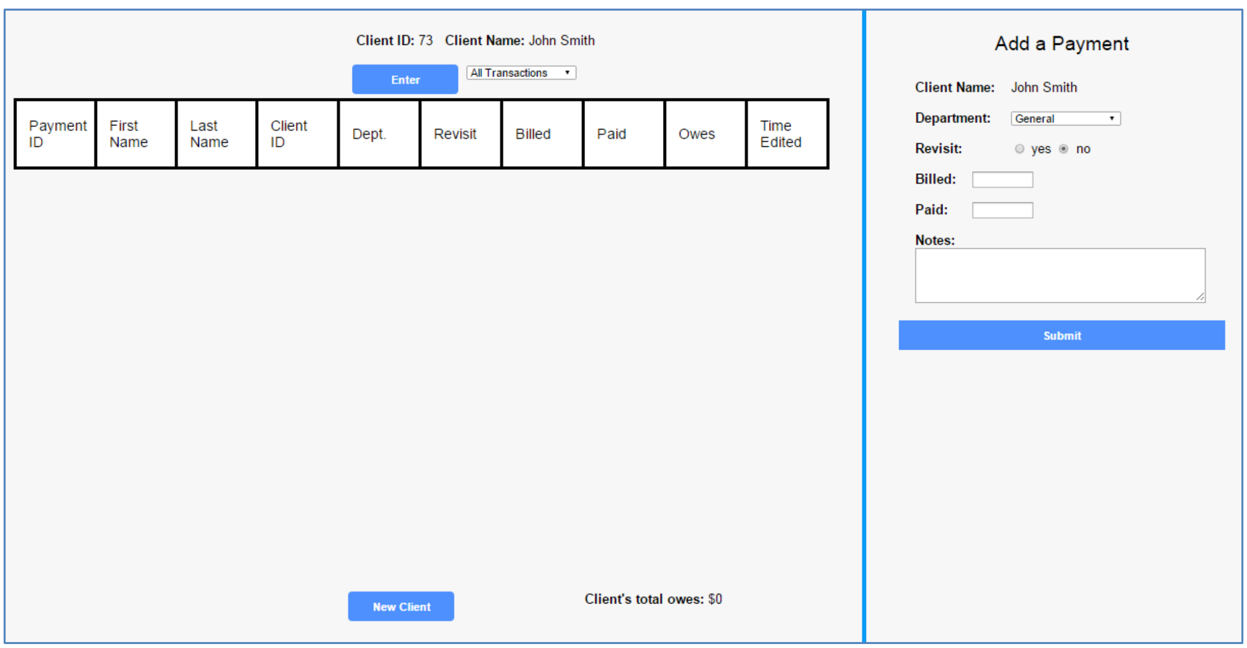
The treatment form allows you to doccument your findings and treatment plan. You create a treatment form for a client the same way you create other forms. The treatment form has a series of text boxes that allow the user to input information regarding their findings and plan. At the bottom of the form is a blue box that says, "Add Diagnoses." Click on this box to add a diagnoses. This will take you to a different screen with a diagnosis box. The diagnosis box is a drop down menu. You must choose a diagnosis from the list given. Choose the diagnosis you wish to use and click "add," The diagnosis will appear below. If you wish to remove a diagnosis, type the diagnosis you wish to remove in the diagnosis box and click "remove." The diagnosis will disappear from the list.

Additional Options

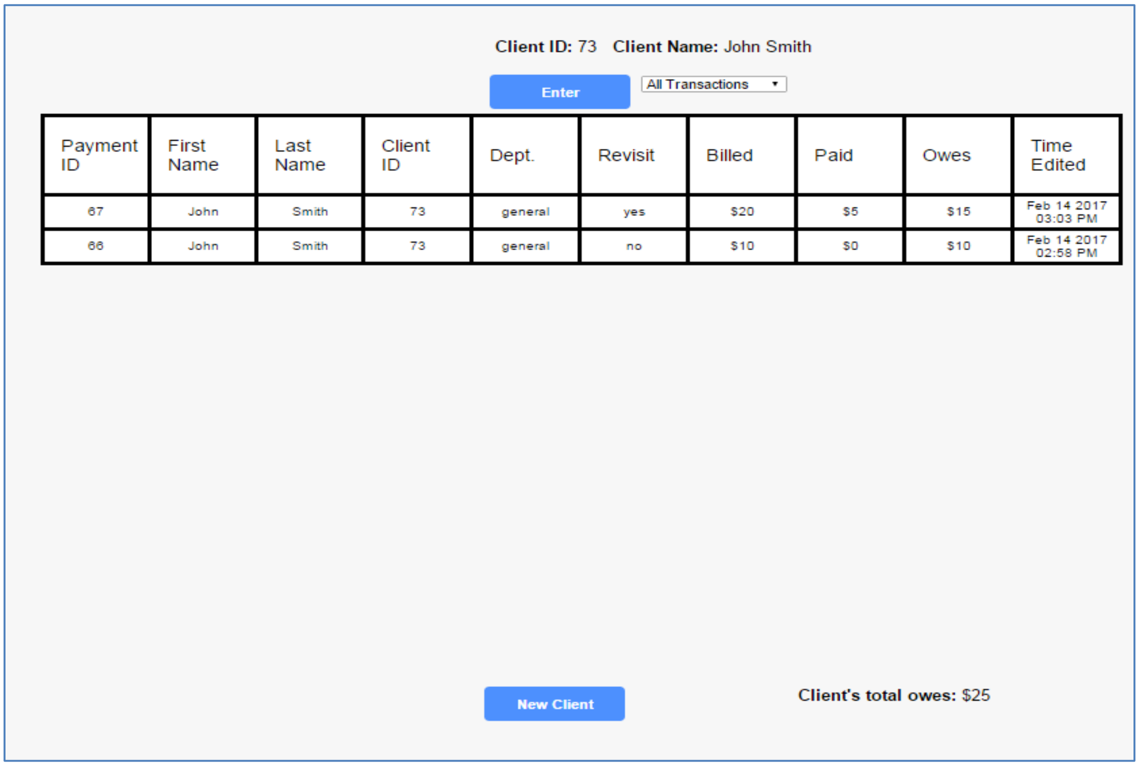
Master Log:

Intro: This is where financial information and records such as billing transactions are kept and managed. When you click on the Master Log, you will go to a client seach screen. To search for an existing financial transaction, use the Search box near the top of the screen. To create a new financial transaction, use the blue “Pick Client” box at the bottom of the screen. Search for the client you are looking for.

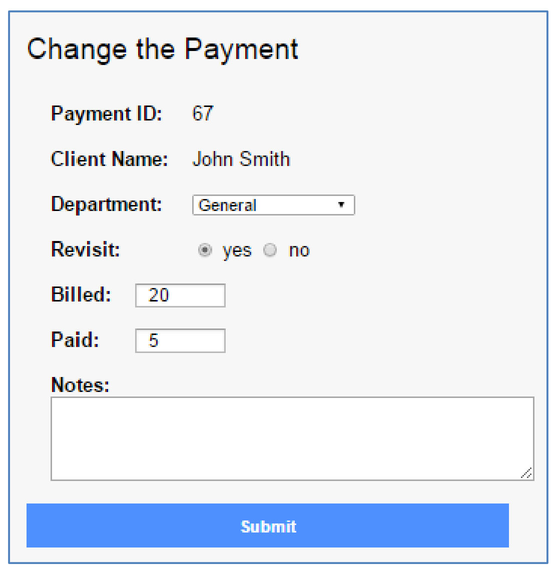
New Financial Transactions: Use the “Pick Client” box at the bottom of the screen to find an existing client you wish to creat a financial transaction for. When you choose the client, you will be taken to this screen.



On the right side of the form under “Add a Payment,” you should see your client’s name. Choose the department from the drop down box. Enter the amount to be billed and the amount the client has payed. You can add any notes you like in the text box below. When you submit this, the information will show on the left. The most recent transaction will always be listed on top. The total amount the client still owes will be shown at the bottom. See the picture below to see what this looks like. To review transactions of only a certain type, you can chooses the transaction types you wish to see from the dropdown box at the top of the screen and click the “Enter” box. You will only see the transaction types you requested, however the amount the client still owes will be shown for all transaction types.



Existing Financial Transactions: to view or ammend a financial record, use the search box at the top of the Master Log form to find the financial record you are looking for. You can search using the client's name or an asterisk to get a list of all clients. You can select a specific transaction type from the drop down box to the right or search for all transactions pertaining to that client. This will give you a list of financial records. choose the record you wish to view. The record will look like the one to the right. You can make changes to the record such as add money payed or adjust the billed amount. When you submit this form, the records will be amended. You can then search for the client the same way you did above when creating the new financial transaction to see what if anything the client still owes.



Master Log Stats

Master Log Stats shows you an overveiw of all financial transactions showing how many client encounters have occurred, how much was billed and payed for each type, and how much is owed. This can be viewd in total or from and to specific dates as entered at the top of the form.

Employee Info

Employee Info allows you to search through a list of Hope Matters employees for basic information such as Job title, normal work location and hours. It also shows the employees contact information such as email and phone number. You can not change this information. If you wish to change your personal information, you can do so from the dashboard by selecting "Change Info" at the top of the page.

Database Administration

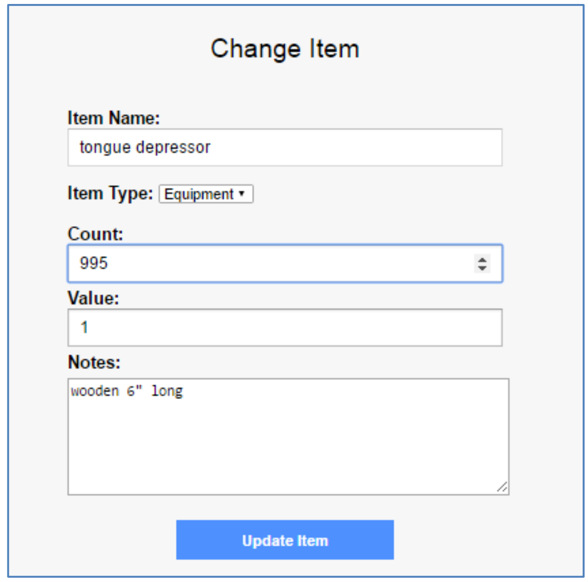
This link is only available to database administrators. It will take the user to a separate program which will allow you to review the raw database data this program generates. This will allow you to generate statistical information and manage the information contained in the program.

Inventory

Inventory allows you to manage medications and supplies. From here you can add items, then subtract them as they are used, or add when they are resupplied.

Adding Items: To add a new item to inventory click on the "Add Item" box at the top of the page. This lets you add a new item to the inventory that does not already exist. This is not for adding additional units of an item you already have in inventory. When you click the box, you will be asked for an item name such as tongue depressor or stethescope. From the drop down box below, choose wheather the item you are entering is a supply, medication, or piece of equipment. In the "Count" box put in how many of the items you are entering into inventory. Next give their individual value in Kenyan Shillings. You may add any other necessary information in notes such as a brand name or color. Save the item by clicking on the blue "Add Item" box at the bottom.

Searching items already in inventory: To review or ammend items already in inventory, use the search box on the inventory page. You can mark the circles above to search all items or the item types you wish to see such as equipment or medications.   Type the item in the search box or use the asterisk for a complete list of all items and click "Search." You will be given a list of all items that match your search criteria. Choose the item you wish to view. You will see a page like the one on the right. You can change the information such as subtract from the count to reflect items used and disposed of or add to the count when new inventory is added. Click "Update Item" when done to save the changes.



Diagnosis Totals

Diagnosis totals will give you a total number of times a diagnosis was used in a specific date range. Enter the diagnosis you wish to search for in the "Diagnosis" box. Provide the date range you wish to search and click "Generate Stats." This will give you the total number of times that diagnosis was used within the specific date range.

Report Bug

If you find a problem (a bug) with this program which needs to be addressed by the programmer, you can report it by filling out a bug report. Click on "Report Bug" located near the center of the dashboard and fill out the report. First note the severity level of the bug from level 1 to level 3. The defenitions for the different severity levels are listed on the bug report. Note the location of the bug. That would be the page you were on when the problem occurred. Then type in a description of what the problem is and how it happened. If you are able to capture a screen shot of the problem or error message you received, that could also be helpful. When you are done, click "Add Report."

Capturing a Screen Shot: To capture a screen shot, press the "Print Scrn" key on your keyboard while the problem or error message is still visible on your screen. This caputures whatever is on the screen of your computer. Then open a program such as Word. Right click on the blank page and select “Paste” from the menu. You should see a copy of your computer screen saved on the page. Save this file on your computer. Then go to the bug report form. On the bottom of the form you will see “Upload a Snapshot.” Click “Choose File.” Find the file you just created with the screen shot and attach the file.

Capturing an Error Report: When the program detects a bug in itself, it will generate an error report. It will look something like this.

```
********************************************************************************
Error

Please create a bug report that contains the information below,
and send it to the following email.

aklassen@andrew-klassen.net
********************************************************************************

Error Location: update_item.php


SQL Query:

INSERT INTO inventory_history (inventory_id, name, type, count, value, notes, timestamp, created_by) SELECT inventory_id, name, type, count, value, notes, timestamp,
created_by FROM inventory WHERE inventory_id='10';

Database Error:

SQLSTATE[23000]: Integrity constraint violation: 1062 Duplicate entry 'tongue depressor' for key 'name_UNIQUE'

Client's Web Browser: Google Chrome
Version: 56.0.2924.87
Platform: windows

User Account ID: 10
Time: 2017-02-14 16:21:31


********************************************************************************
Back to dashboard
********************************************************************************
```

To save this, you can capture it in a screen shot as described above, or you can highlight the text of the report, right click the screen and choose “copy.” Then go to the bug report. Right click in the “Description” box and select “paste.” That should copy the text of the error report into the bug report.