



BATCH PROCESSING INSTRUCTIONS

HEALTHSTATUS ASSESSMENT SOFTWARE
HEALTHSTATUS.COM, INC.

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OVERVIEW

Batch processing allows you to enter paper based assessments into the HealthStatus assessment system and better control work flow. Batches may be entered, closed and printed as groups. If you were receiving filled out forms from two or three groups, you could make each group a batch. Better still, you could make each a batch based on the day the printed forms were received. Or you can use the batches for control purposes, putting a fixed number of documents in each batch.

The process is simple, break the printed forms into a batch, login to the HealthStatus system, enter each form of data into the system, close the batch, audit the batch, print the batch and return the reports to the end users. Printing of batch files actually means creating a zip file that contains the PDF files that can be sent to a printer, one file for each assessment entered in the batch.

PREREQUISITES

HealthStatus Assessment System
Internet Connection
Web Browser

A user name and password to the HealthStatus system with a rank of, clerk, coach or admin.
Adobe Acrobat Reader or other program capable of reading PDF files.
A program that will open Zip files. (Windows XP has this ability built in)

INSTRUCTIONS

BATCH PREPARATION

Collect the preprinted questionnaires from your users. We suggest that batches be broken down into manageable groups of 25-35 questionnaires per batch. These should be separated by clipping or banding the question sets together. As each batch is processed it is a good idea to write the batch number on a slip of paper or the top page of the batch. This is a good time to visually scan each questionnaire and look for problems prior to data entry, missing data, incomplete forms or damaged questionnaires should be handled according to a predefined policy. Multiple batches can be processed at the same time, and we recommend that a batch be handled by a single data entry person whenever possible.

LOGIN

You should login to your system using the process defined by HealthStatus and your technology department. The user you login with will require a rank of clerk, coach or admin.

You will see a section on your assessment records page similar to this:

You are logged in as an administrator.
[Run group reports.](#)
[Review another users assessments.](#)
[Remove groups/users from system.](#)
[Batch data entry.](#)
 * [Cardiac Assessment](#)
 * [Diabetes Assessment](#)
 * [Fitness Assessment](#)
 * [General Well-being Assessment](#)
 * [Health Risk Assessment](#)
[Batch printing.](#)

First you will want to select a type of assessment to enter in first. Batches can be made of assessments of any type and can be mixed, (you can have fitness and cardiac assessments in the same batch). Click on the first type of assessment and you will see a screen similar to this:

Batch Entry Diabetes

Switch assessment [\[cardiac \]](#) [\[fit \]](#) [\[health risk \]](#) [\[well-being \]](#)

Batch Number healthstatus-03-24-2006-08-40-20

Diabetes Assessments entered 0

Total Assessments entered 0

[\[close batch \]](#)

[\[close and print batch \]](#)

[\[assessment records page \]](#)

Batch Identifier: Don't change this!

Registration/Location Number:

First name:

Last name:

Address Line 1:

Address Line 2:

Member ID:

Sex:(M/F)

Please indicate your race:

This page will allow you to switch to a different assessment to input, close a batch, close and print a batch, go back to the assessment records page or enter the information for a user.

ENTER DATA

The batch entry system is designed to be easy for a data entry person to enter data more quickly on a single page and minimizing the use of the mouse on the screen as most of the entry can be done with keystrokes. As part of the batch number the login used is recorded, this can be helpful if you find quality control problems, want to monitor the number of batches entered or for other reference. The date and time stamp are also recorded as the rest of the batch number.

The batch identifier is an internal number and should not be changed unless HealthStatus.com directs you to. The registration/location number relates to the group that the user is a member of. This code is used for aggregate and group reporting.

If you are not entering address information, contact HealthStatus.com and we will remove the address fields.

Enter each completed assessment into the form and click submit, a new screen will come up for the next assessment. Repeat until the batch is completed and return to the assessment records screen.

You can mix types of assessments within a batch.

CLOSE BATCH

Once a batch is closed, no more assessments may be entered into this particular batch. Some people like to do batches according to a certain period of time. Closing the batch simply moves it along in the process so that it is now not available for more data entry, but is now marked ready for printing.

CLOSE AND PRINT BATCH

This takes two steps and combines them as one, the batch is closed and internally marked for printing, and then it is printed to a PDF file and internally marked as having been printed.

BATCH ADMINISTRATION

The batch administration section allows you to perform various functions on batches in any of the steps of the process. You can continue to add assessments to an open batch, batches can be closed, batches can be closed and printed, closed batches can be printed, and printed batches can be reprinted.

GENERAL TIPS ON BATCH ENTRY

Have a process and being organized up front helps tremendously. The process should include the following:

- Number of assessments in a batch. (recommendation: 30)
- How are batches put together? (recommend: file folder per batch)
- Decide if you mix assessment types within batches. (recommendation: no)
- What do you do with missing, unreasonable or unreadable input? (recommendation: return to user)
- Do you close batches at the end of a work day/shift? (recommendation: depends)
- Are you going to print each batch as it is completed or will you enter all batches then print? (recommendation: depends)
- How are the printed reports going to be returned to the members and still be sensitive to privacy?