ezChartWriter™

User Guide

June 1, 2008

This manual covers ezChartWriter Version 3.0

Table of Contents

Using this Help Guide

Overview

This is the user guide for ezChartWriter. The guide will take you through program functions step by step. Using the submenus at the left, you can jump to any topic desired.

You can access this manual by clicking **Help** on any screen within ezChartWriter.

How to Search this Manual

From any place in the manual you can click on a topic in the left-side contacts panel. You can also click any subtopics that display for additional information.

What Sections Should I Read First?

How to Use this Guide will acquaint you with how to navigate through the document and the conventions used in this guide.

Getting Started with ezChartWriter is a good place to start, even if you already know a little about ezChartWriter.

Installing and Setting Up ezChartWriter will help you with any problems regarding installation, registration, and upgrading.

FAQ and Troubleshooters

At the end of the manual you will find FAQ (Frequently Asked Questions) articles including troubleshooting hints, providing answers to common and not-so-common questions and problems.

How to Use this Manual

Navigating this Manual

This User's Guide is provided in both printed and electronic form, searchable with most commonly available document viewing programs. If you cannot locate an index topic you need, please do a text string-search for the relevant word or phrase, or related words.

The screenshots shown throughout this guide have been taken with a relatively small window size. The default display is a window that fills the screen. Click once on the **Minimize** button (upper right-hand corner of window display) to get a smaller working area; click on the **Maximize** button to return to full-screen display.

The screenshots have been taken with the next-to-last version of the software. We have made every effort to match what you will see in ezChartWriter with what the guide shows, but there may be slight discrepancies.

This guide assumes you have basic familiarity with using a mouse and file manipulation in Microsoft Windows. This manual was written using a tree structure (for example, topics are listed in a hierarchical branching format). If the tree is fully closed, click the "+" sign in the box icon ⊞ to the left of the node icon to open up the first branch, then repeat this process to open up further branches. Alternatively, click the blue underlined hyperlinks on this page to jump to the main sections.

If you want to move down the tree using the keyboard, press the **Tab** key. This will take you to all subtrees that are currently open.

Conventions Used in this Manual

Click refers to clicking a menu item, a button or a clickable icon (tool button).
Press refers to pressing a keyboard key or key sequence.

Mouse and Keyboard Notation

Mouse Notation

Unless otherwise specified, **click** refers to clicking the left mouse button once. Where there might be ambiguity, the terms **left-click**, **right-click**, and **double-click** (using the left mouse button) will be used.

Drag-and-drop refers to dragging an object with the mouse cursor while keeping the left mouse button depressed, then releasing the left mouse button to "drop" the object.

Keyboard Notation

Keyboard key combinations are shown in boldface, for example, **Backspace** means “Press the **Backspace** key.”

The **Control** key is shortened to **Ctrl.** For example, **Ctrl+A** means "Press the **Control** key, and while holding it down, press the **A** key."

The **Alt** key is an abbreviation for **Alt**ernative.

The **Shift** key is not abbreviated.

Shift+Ctrl+A means "Depress the **Shift** and **Control** keys, and while holding them down together, press the **A** key."

Note: You can choose the **Shift**, **Ctrl** and **Alt** keys from either side of the keyboard, according to convenience.

The **Escape** key is abbreviated as **Esc**.

To **select a node** means to click its icon or title in the Tree view on the left side, or move the Tree view cursor up or down using the cursor (arrow) keys, until the desired node is highlighted.

Mouse Conventions

You may perform several actions during your work with this software; the following specific words are used to describe them:

- **Point to –** move the mouse pointer to an item.
- **Click** or **Left-click –** point to an item and press the left mouse button.
- **Right-Click –** point to an item and press the right mouse button.
- **Double-Click –** point to an item and quickly press the left mouse button twice.
- **Drag –** point to an item and press and hold down the left mouse button while you move the item.
- **Select –** highlight or make an interface element active by either clicking it or dragging over it (other actions are possible, if specified in the documentation). If used in **select the check box**, it means that the check box should be marked with a tick (as opposed to **clear the check box** when the check box should be cleared, without a mark).

Keyboard Conventions

Keystroke commands are noted in bold letters. Command key combinations are separated by the dash symbol (“-“). This indicates that the noted keys are to be pressed simultaneously. For example, **Alt-S** signifies that you should hold down the **Alt** key while pressing the **S** key. Bold lower-case letters indicate operating system commands and command lines. For example, you would enter **copy *.*** on the command line exactly as written.

Menu Notation

Menu selections are shown in boldface italics to distinguish them from commands and the rest of the text. An instruction such as "Click ***File / Save***" means "Click the word ***File*** on the Main menu (located at the top of the window) and when a drop-down menu appears, select ***Save*** from the list of options.

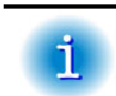
If the words in the menu appear faint or "greyed-out," this means that the menu option exists, but is unavailable (disabled) right now.

When there is a specific order of buttons to click, they will be separated by the arrow symbol "**-->**"; to complete the action follow the sequence exactly as presented.

For an explanation of **keyboard shortcuts** and **menu access keys** see Making it all happen.

Other Conventions Used in this Manual

Besides icons noting specific operating systems throughout this manual, the following are used to indicate specific types of information. The applicable information follows each icon in indented paragraph format as shown below:



This icon is used to identify important information and tips.

Warning information following this icon may help you avoid a problem.

About ezChartWriter

Overview

ezChartWriter is part of a suite of applications (existing or under development) belonging to the ezHealthWare family. ezChartWriter™ was created by Iccomplish Inc.

Contact Information

Home Page: www.ezChartWriter.com
Email: support@ezChartWriter.com

ezChartWriter on the Internet

Direct links to ezChartWriter:
ezChartWriter Home Page (www.ezChartWriter.com);
ezChartWriter Support Page (www.ezChartWriter.com/support.htm);
Download the latest ezChartWriter Version (www.ezChartWriter.com/download.htm);

NOTE: The above links are opened by your default Web browser when you are connected to the Internet.

To check to see which version of ezChartWriter you are currently using, click on the ezChartWriter logo on the main screen or select menu ***Help / About***.

Enhancements

EzChartWriter 3.0 Enhancements

For the latest news of improvements to ezChartWriter, please check the website at www.ezChartWriter.com

New Features

Added: An option to automatically update ezChartWriter over the Internet.
Added: Ability to print spectacle and contact lens Rx's

Improvements and Bugfixes

Bugfix for error message `Unsupported encryption type: 0`
Bugfix: when printing a report through the Report Writer, images are now printed again.

New Database Format

ezChartWriter versions 3.x support a new and improved database format. Previous versions will be automatically converted to the 3.0 version.

Backups

Added: ezChartWriter can now automatically create multiple (numbered) backup copies.

Future Enhancements

The following features will be implemented in future versions (not necessarily in the order listed):

- Enhanced alarm, reminders
- Website export: Web search engine
- Optional plug-in for sending/receiving e-mail
- More options to export to PDF
- Export and import to/from MS Word .Doc file format
- Better customization of reports and Rx's
- Ability to customize list of medications

Getting Started with ezChartWriter

Program Description

What is ezChartWriter?

ezChartWriter is a powerful, yet easy-to-use software system for creating and printing medication and/or ophthalmic prescriptions. It includes a built-in word processor, report editor, Rx logbook feature, reminders and note documentation tool in one application, which you can use to organize your patient demographics, Rx's and other data.

Program Structure

ezChartWriter uses familiar images as the cornerstone of the user interface. For example, to create a patient chart, one click on the **New** drawer of the File Cabinet gets you there. On screen, a patient chart looks similar to what you would see in the paper format. Rx's and notes are presented in lists that can be double clicked to call up the appropriate report. The report editor is similar to standard word processors available in Windows XP.

Rx Wizards

In order to quickly build a Rx, a wizard is available to walk you through the process. Whether you are creating a medication Rx, a spectacle Rx or a contact lens Rx, the wizard gives you the tools to easily enter your prescription data. One of ezChartWriter's great strengths is that it allows you to create Rx's based on prior data, simply by double clicking on a past Rx in the Logbook

It should be mentioned that ezChartWriter does not oblige you to use the Rx Wizard at all. For example, for custom Rx's you can simple open a blank report and manually type your data.

Reports

Although functioning mostly to generate Rx's, ezChartWriter can also help you save time by generating letters, reports, and patient handouts. Many pre-existing sample reports are included or you can build your own!

Compatibility

Since ezChartWriter can export data in both text and PDF formats, you can send your Rx's and letters in e-mail or simply create backup copies that can be opened on any computer.

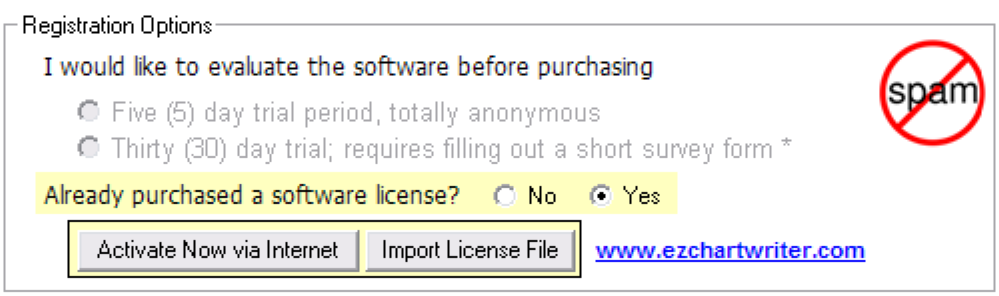
Evaluation Period

ezChartWriter is free to try for up to the first 30 days, during which time the program is fully functional. Beyond this limit, you need to register the software. You should keep the following in mind when evaluating ezChartWriter:

- The installation of a fresh version of ezChartWriter over a previously installed evaluation version does not prolong the original 30 day evaluation period.
- Each location (clinic) that uses ezChartWriter will have its own uniquely assigned serial ID number and account number. Your account number is your practice telephone number. When you register the software you will be asked to provide your practice telephone number; please provide a valid and accurate number. If your telephone number should change in the future, you will need to re-register your software. If you have two (or more) locations, each will require a separate registration number.

Registering ezChartWriter

To register ezChartWriter, you simply need to download the **activation** codes provided to you once the software is properly licensed.



ezChartWriter will run unregistered for up to 30 days. When unregistered, the software runs without limitations of any kind; what you see is what you will get.

When you run an unregistered version of ezChartWriter in excess of the allowed 30 days, a window will appear displaying the expiration status of your trial and giving you the opportunity to do one of the following:

- **Purchase** your version of ezChartWriter (with the Purchase Software button or directly via the ezChartWriter website);

- **Register** your version of ezChartWriter by using the online activation (or CD-ROM) you once you have purchased your license(s); or

- **Exit** the unregistered program.

You can also find the Purchase/Register options by logging in as the **Adminsitrator** and clicking **Admin Settings --> Software Account.**

Once you register ezChartWriter, you will notice that the **View Licenses** menu of the Administrator screen displays your serial number and registration status.

The registration Web page, where you can purchase and register your ezChartWriter software is located at www.ezChartWriter.com/order.htm

If you have more than one clinic location, each will need to be individually registered since each will have a separate database and account number (which is the practice telephone number).

You DO NOT have to purchase a license for each computer and/or user; we license only the single clinic location.

Purchasing ezChartWriter

For detailed information regarding how to buy a software license, visit the website located at www.ezChartWriter.com

Meeting Your Requirements

We highly recommend that you use a computer system with more than the minimum requirements to improve performance and speed. Also, the choice of network greatly impacts the speed at which you can access the database. Wireless networks should only be used for light-duty workstations.

You can find up-to-date information about system requirements by visiting our website located at www.ezChartWriter.com

ezScriptWriter System Requirements	
The chart below lists the **Minimum Computer** requirements that you will need to be able to successfully use the ezScriptWriter software.	
	**Operating System:** Windows XP or Vista **Processor:** 2.0 GHz or faster **Memory (RAM):** 256 MB (512 MB recommended) **Monitor:** 17" or 19" LCD recommended **CD-ROM Drive:** Yes, if doing CD backups **Internet Connection:** Not required, but highly recommended to update software easily.

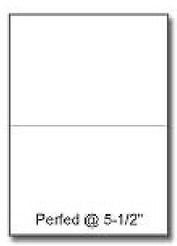
Before you start using ezChartWriter, you should have a working knowledge of your PC and your operating system. The software is designed to operate under Windows XP/2000/2003. You should know how to use a mouse, keyboard, the standard Windows menus and commands, and how to open, save, and close files. For more information, consult your Microsoft documentation.

To use ezChartWriter successfully, you need to a printer (preferably a Laser printer, although an inkjet will work). You also need pre-perforated copy paper if you intend to create two half-page Rx's (useful if you would like to keep a duplicate paper copy for your records). And, of course, you need a computer that is capable of running ezChartWriter. A network setup is very desirable, as this will allow frontdesk staff to enter the basic patient demographics and to print Rx's for patients at the front counter.

Recommended Paper

No Security Features: Weyehaeuser 20 lb. pre-perforated copy paper (at 5 ½")

- Available by the case from Office Depot or a similar office supply store
- Advantage: Low cost
- Disadvantages: Easy to alter; not valid in some states



Security Paper: Secure Laser Rx Paper (various formats)

- Includes security background (word VOID appears when photocopied)
- Erasure protection
- Advantage: Nearly impossible to duplicate/alter
- Disadvantage: Much more expensive than copy paper

NOTE: If you intend to print computer-generated medication Rx's, please check with your state Pharmacy Board to verify that they will be acceptable in your state or locality. Some states, for example New Jersey, require pre-numbered prescription blanks.

Recommended Printer

KONICA Minolta-QMS PagePro 1350-W Laser Printer

- 21 pages-per-minute
- 1200 dpi, 8M
- Can usually be purchased for under $200 online or at any computer superstore

Recommended Network Gear

Wireless Pre-N Broadband Router

Click here to visit the Belkin website.

- Allows both wired and wireless connections
- Can usually be purchased for under $100 online or at any computer superstore

NOTE: ezChartWriter will operate much slower on a wireless network than over a wired ethernet system.

Example Uses of ezChartWriter

The following are situations in which ezChartWriter may apply:

Scenario 1: Solo Optometrist (Laptop in Exam Room)

The simplest configuration for ezChartWriter is a one doctor, one computer setup. This eliminates a lot of the headaches associated with networking and keeps hardware/software costs to a bare minimum. It does require a bit more time per patient, as the doctor will be responsible for entering the basic patient demographics (at a minimum the patient name, DOB, and gender) and the Rx data.

The ideal situation is with ezChartWriter running on a laptop computer connected to a small laser printer. As each patient exam begins, the provider creates a new patient chart (or opens an existing one) and uses the Rx wizard to create all required Rx's. A duplicate copy can be printed; one for the patient and one for the patient's paper chart.

Estimated Startup Cost:

Hardware:	Laptop computer with Windows XP/Vista $1000 Laser Printer $200
Software:	ezChartWriter $129 (single license)
Supplies:	Annual supplies = 2¢ per Rx (toner/paper) x 2500 per year = $50
TOTAL:	$1379 startup costs (even less if you own a laptop/printer)

Scenario 2: Primary Care Doctor in Small Clinic (3-4 Computers Networked)

A small, networked configuration for ezChartWriter can also be very affordable. Most small clinics already have the existing infrastructure to run the software as is. Typically, you need 3 to 8 computers, a peer-to-peer network running under Windows XP, and at least 256 MB of RAM memory on most of the computers.

As each patient is checked in by the front desk receptionist, a chart is created in ezChartWriter (with as much or as little data as you wish). The chart remains visible in the **Pulled Charts** list. After the doctor completes the exam, any relevant prescriptions can be generated on the spot (either printed in the exam room or at the frontdesk). At the end of the day, the doctor can sign-off on any open reports or Rx's and close out the charts.

Scenario 3: Retiring Doctor with New Associate(s) (Looking to Install Network)

In today's technological workplace, a practice that is computerized may have a higher perceived value than one based solely on paper records. Many younger practitioners expect for your records to be computerized. The ideal situation may be a full-fledged EMR (electronic medical records) system, but as you near retirement the cost and time investment may be much too overwhelming. Alternatively, a system like ezChartWriter can give you the best of both worlds: partially computerized records (especially the repetitive, data intense prescription management side of things), while minimizing cost and capital expenditures.

Installing and Setting Up ezChartWriter

Overview

The following is an overview of the ezChartWriter installation process:

- Make sure that no other applications are running.
- Insert the ezChartWriter CD-ROM into your CD-ROM drive or start the downloaded executable (if received via download). If the Installer does not start automatically from the CD, click the Windows **Start** button and choose **Run**. Click **Browse**, locate **setup.exe** on the CD-ROM and click **Open**. Click **OK**. Follow the on-screen instructions to complete the installation.
- After installation is complete, you can start ezChartWriter by clicking on the icon found on your Windows XP Desktop or from the Start/Programs list.

First-Time Installation

The following procedure for installing ezChartWriter for the first time assumes no current patient database exists.

1. Insert the ezChartWriter CD into your CD drive and wait for setup to begin.
2. If setup does not start automatically, use Windows Explorer to open the CD drive folder and double-click **Setup.exe**.
3. Follow the installation prompts until setup ends.
4. Occasionally pop-up error messages may occur asking about a **Read Only** file. When this happens, simply click retry and the program should continue
5. Rarely, a pop-up message may state that a certain file couldn't be registered or other problem was detected. Generally, this may mean that a program might be in use already. Shut down all applications that might be running and attempt to try the installation again. In some cases, simply clicking **Ignore** on the error box is sufficient.

6. If requested, restart you computer before attempting to use ezChartWriter.

7. Once the setup program has completed, find and double-click the desktop icon.

Installing ezChartWriter from the Internet

When instaling ezChartWriter from the Internet, the first-time installation instructions above apply, except that you must first download the software to your computer. Run the Setup Wizard that appears and follow the on-screen directions.

Upgrading Prior Version of ezChartWriter

Before upgrading a prior version of ezChartWriter, backup-up your current ezHealthWare folder to CDROM or other "safe" media. You are now ready to begin a “fresh” install to replace the older ezChartWriter version. If you are installing on a network, it is usually best to begin by installing on the computer that acts as your "server," for example, the computer that holds the main ezChartWriter database. Begin by inserting the setup ezChartWriter installation CD-ROM into your drive and follow the general installation instructions.

Before running the new version, you must run the database upgrade utility (DBUpgrade.exe), if and only if it is supplied on the CDROM with the upgrade version of ezChartWriter. This utility makes whatever necessary changes that are required to keep your database current with the new version of ezChartWriter software.

CAUTION: Do not run the upgrade utility before you have finished installing the newer version of ezChartWriter. Do not run the upgrade utility again after you have begun using the new software. Serious data loss may occur.

NOTE: If you are requested by technical support to uninstall your old version of ezChartWriter, you may do so according to the following:

1. Uninstall any older versions of ezChartWriter
2. Open the **Control Panel**.
3. Select **Add or Remove Programs**.
4. Select **ezChartWriter** and proceed with the removal process.
5. The patient and user databases are never removed during automatic un-installation. They will remain in the ezHealthWare folder, ready to be upgraded in the next steps.

Uninstalling ezChartWriter Software

To uninstall ezChartWriter (Windows XP)

1. Open the **Control Panel**.
2. Select **Add or Remove Programs**.
3. Select **ezChartWriter** and proceed with the removal process.

If you wish to delete the databases, this must be done manually (patient and user databases are never removed during automatic installation to prevent accidental deletion; they must be erased by deleting the whole folder.):

1. Open the drive containing your **Program Files** folder (usually C: drive).
2. Look for the **ezHealthWare** folder, select the **ezChartWriter** subfolder, and select it.
3. Right-click and choose **Delete** from them pop-up menu.

Post Installation Tasks

The tasks listed in this section are recommended before you start using ezChartWriter.

Before Using ezChartWriter with Patients

- Read the Software License Agreement
- Understand your requirements to preserve patient confidentiality (for example, to use secure passwords and limit access to your computer network)
- Design a sensible backup plan (low-cost options could include: NTI Backup NOW! 4.0, FirstBackup, an online backup service, or just plain CD-R discs copied manually).

Customizing Settings in ezChartWriter

- Another setup wizard should appear, this one allowing you to customize ezChartWriter settings. This utility is called **Setup Wizard** and can be run at any time by the **System Administrator** to reset or reconfigure you settings.

- Follow the prompts, paying close attention to file paths. At the minimum, one provider name must be entered at the “user's screen.” Currently, there is a maximum of 10 assigned users. However, some users can share a guest account however.

- Once the wizard has finished, you are ready to start ezChartWriter**.**

First Time User/Password Setup

Before using ezChartWriter, you need to establish a password (this is done individually for all workstations). On the main login screen, choose **Password Options** and enter your username as the password (the assigned username is first initial plus last name. Enter a new password and re-enter it to confirm. If you leave the password section blank, you will default to no password (**not recommended!**). You will be returned to the login screen.

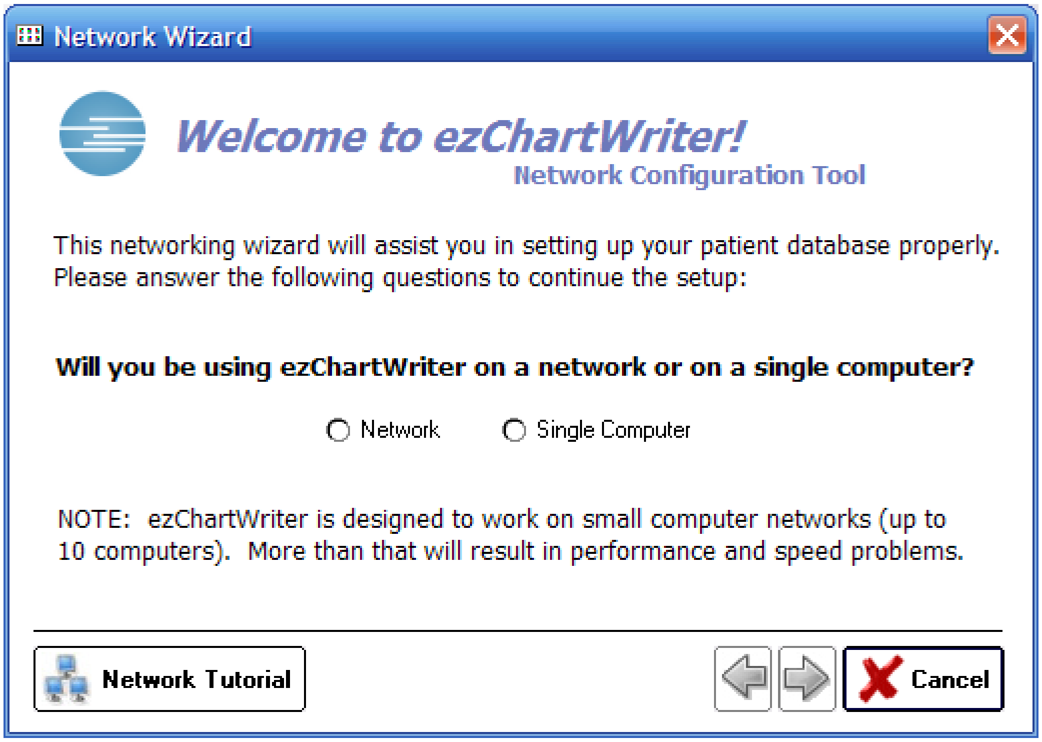
IMPORTANT: It is imperative that you remember your password. There is currently no way to retrieve a password in ezScripWriter.

Using the Setup Wizard

The first time ezChartWriter is accessed, the **Networking Wizard** displays to guide you through configuring the program according to your custom settings (even if you do not plan to install on a network, you must follow these steps).

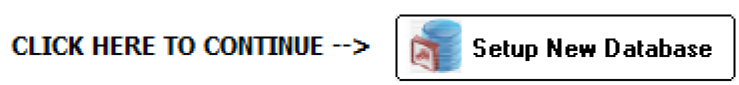
1. Open ezChartWriter. The **Program Setup Wizard** displays:

2. Click **Next** to start the wizard. The **Networking Wizard** window displays:



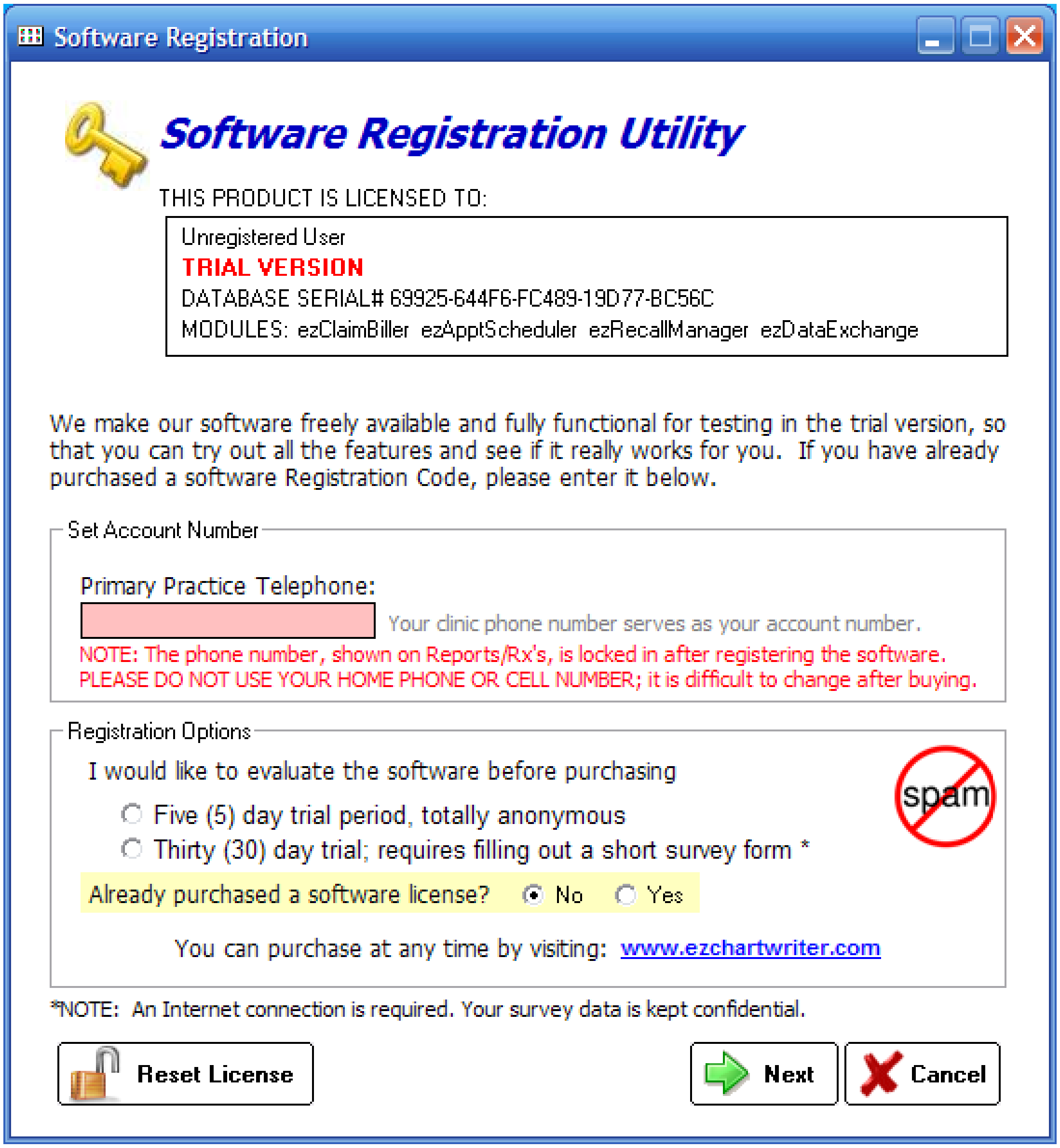
3. Select the **First time installation** option and select the **Edit Admin Settings** box. It is recommended that you use the default installation location (usually the **Program Files\ezHealthWare** folder, unless you are setting up a client computer on a network.

4. Click **Next**. The **Registration of Software** window displays momentarily, and then the **Create New Database Utility** window opens:



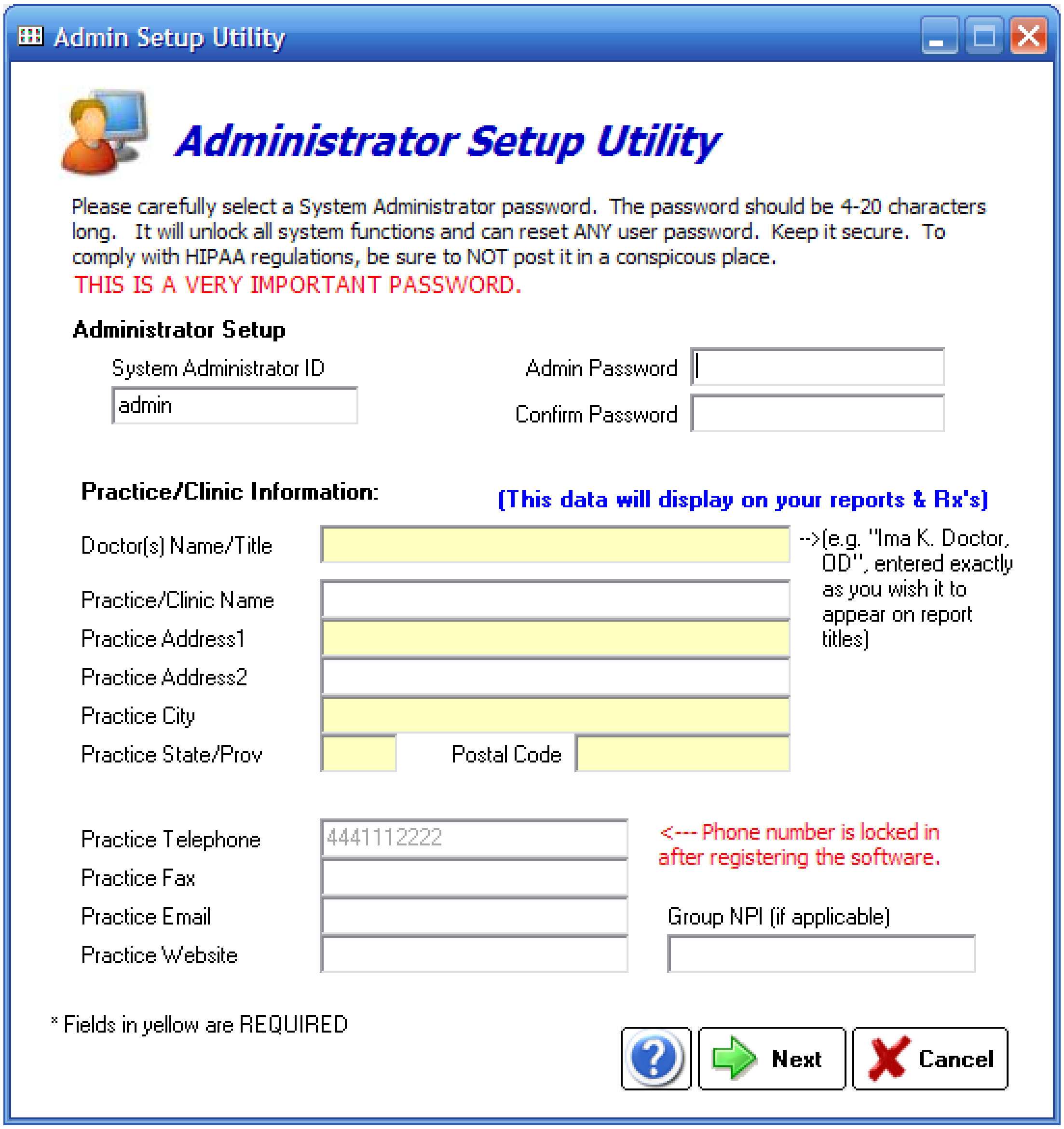
5. Click **Build New Database**. The system builds your database and displays a completion message once the database is created.

6. Click **Next**. The **Registration of Software** window displays:

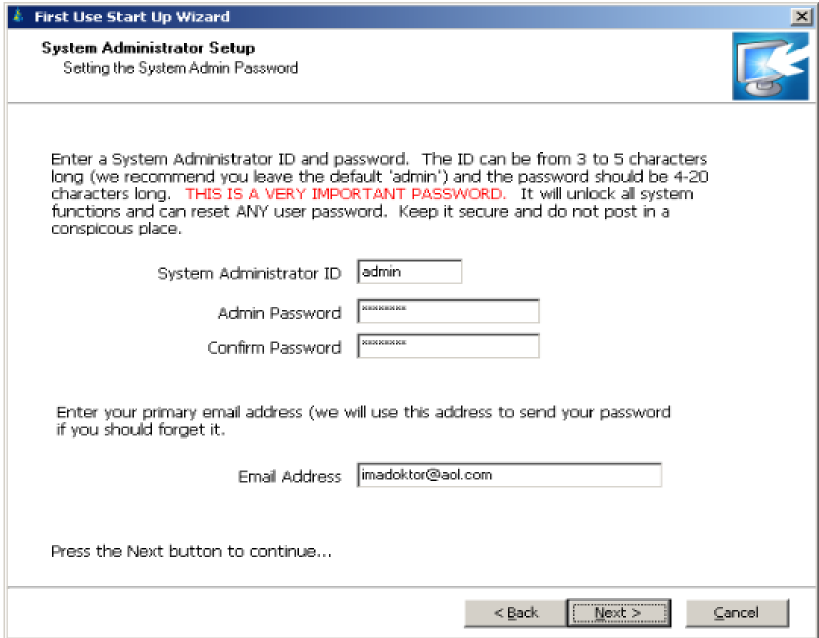


7. Once the database is created, you will be guided through the process of registering and setting up the software. If you are evaluating ezChartWriter, you do not have to provide a software registration key code in the space provided. Simply leave this field blank and you will have an opportunity to use the software with a limited number of patients (30 is the maximum).

8. Click **Next**. The **Administrator Setup** screen displays:



9. Click **Next**. The **System Administrator** window displays:

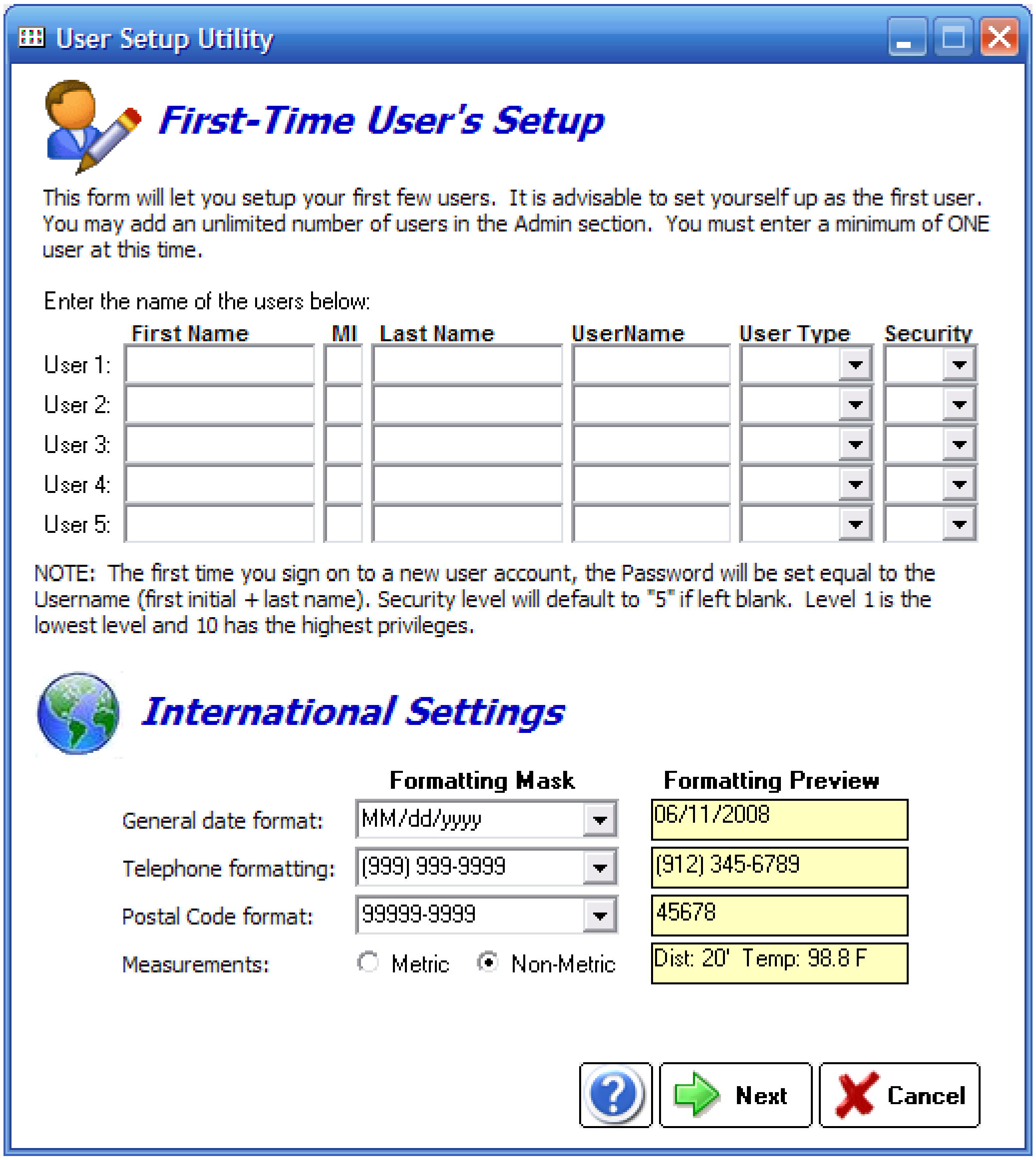


8. Enter a **System Administrator ID**, **Admin Password**, and **Email Address** in the spaces provided. The System Administrator ID should consist of 3-5 characters (we recommend using the default, “admin”) and the password should consist of 4-20 characters.

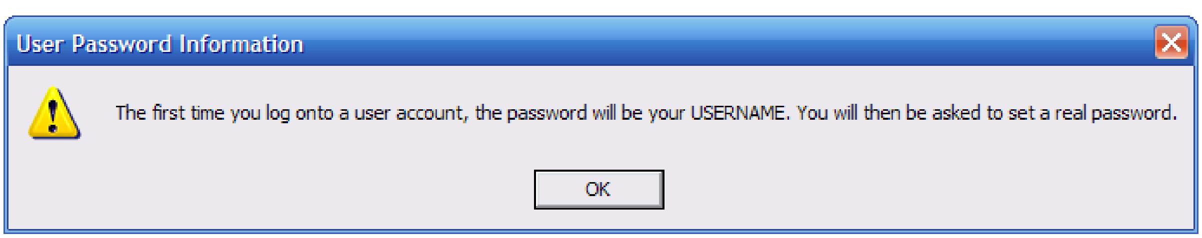
IMPORTANT: The System Administrator is the software user delegated to maintain software settings and security levels, to add or delete users, and to register the software. This individual should be a trusted, long-term employee (preferably someone with good computer knowledge). The password that is selected must be remembered (unlike user passwords, it is not easily reset). **Keep the System Administrator password in a secure location that is not easily accessible by others.**

9.

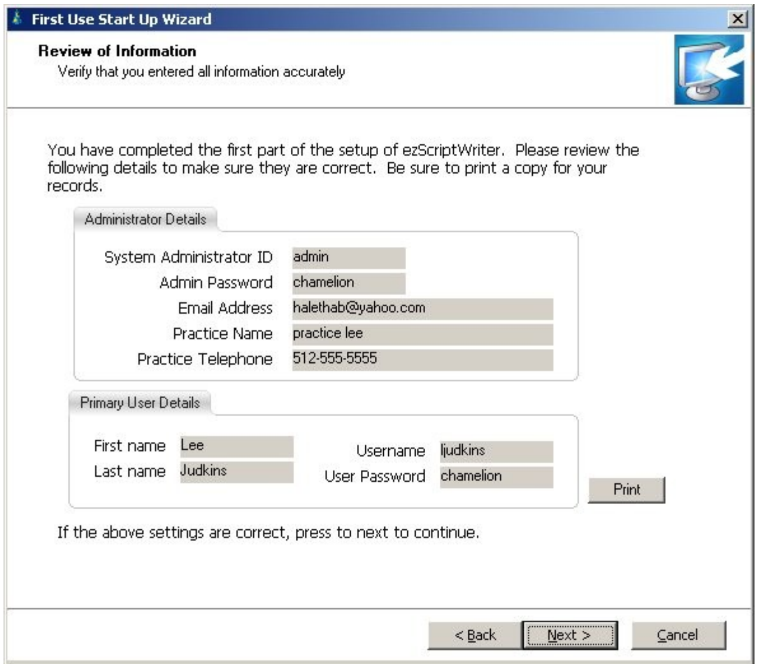
10. Click **Next**. The **Primary User Setup** window displays:



11. Enter your primary user information in the spaces provided. The system will automatically generate a username for you when once you enter your name. You can accept the username or create your own (your username must consist of five characters). You must enter a password that consists of 4-20 characters.

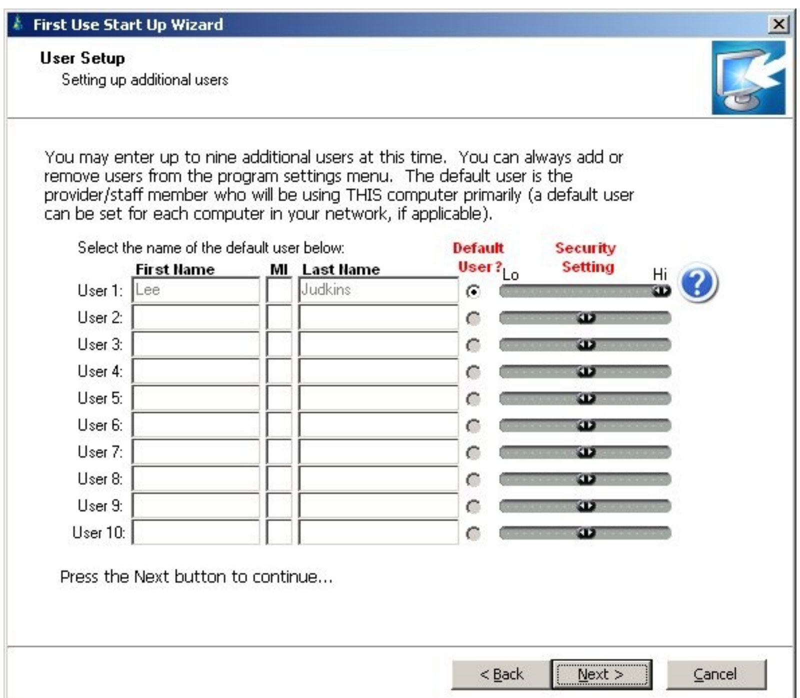


12. Click **Next**. The **Review of Information** window displays:



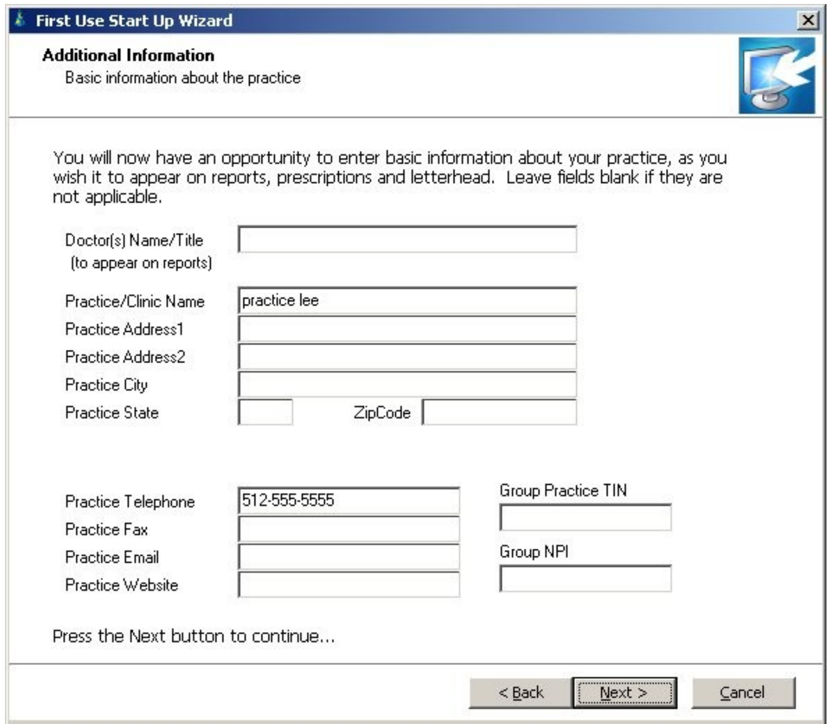
10. Review the information for accuracy. Click **Back** if you need to make changes, or click **Next** to continue with the installation process. The **Software Activation** window displays.

11. Click **Next**. The **User Setup** window displays:



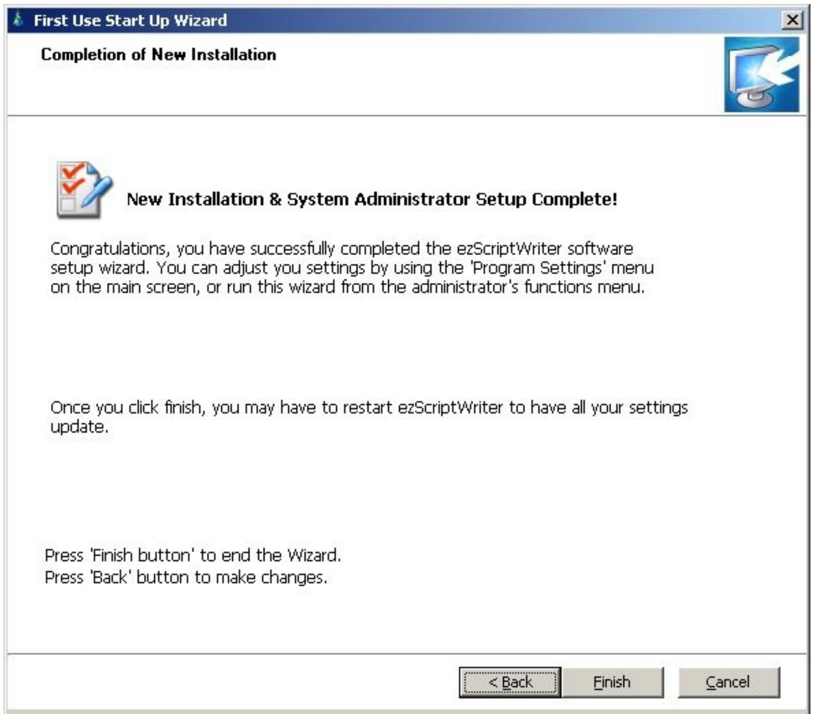
For each user that will use ezChartWriter, enter their name, indicate if the user is the default, and use the slider to select a security setting for the user. You may enter a maximum of 9 users.

12. Click **Next**. The **Additional Information** window displays:



13. Using the fields provided, enter as much or as little information as you want about your practice. The information you enter in this window displays on your reports, prescriptions, and letterhead.

14. Click **Next**. The **Completion of New Installation** window displays:



15. Access ezChartWriter and log in to the administrator account to set the security options.

Setting Up ezChartWriter on a Network

NOTE: The instructions in this section assume you are using the Windows XP operating system. The information in this section is meant to assist an experienced computer user in the setup and configuration of a simple network. We do not provide networking support beyond what is offered here and strongly recommend that you obtain help from a qualified network technician if you are unsure of how to proceed.

Step 1: Set Up and Configure Your Wired or Wireless Network:

Before using the ezChartWriter software on a network, you must first have a network up and running. Generally, a peer-to-peer (workgroup) network is sufficient for using ezChartWriter software.

For the best source of information on setting up your hardware network, see Microsoft's website: www.microsoft.com/windowsxp/using/networking/setup/wired.mspx

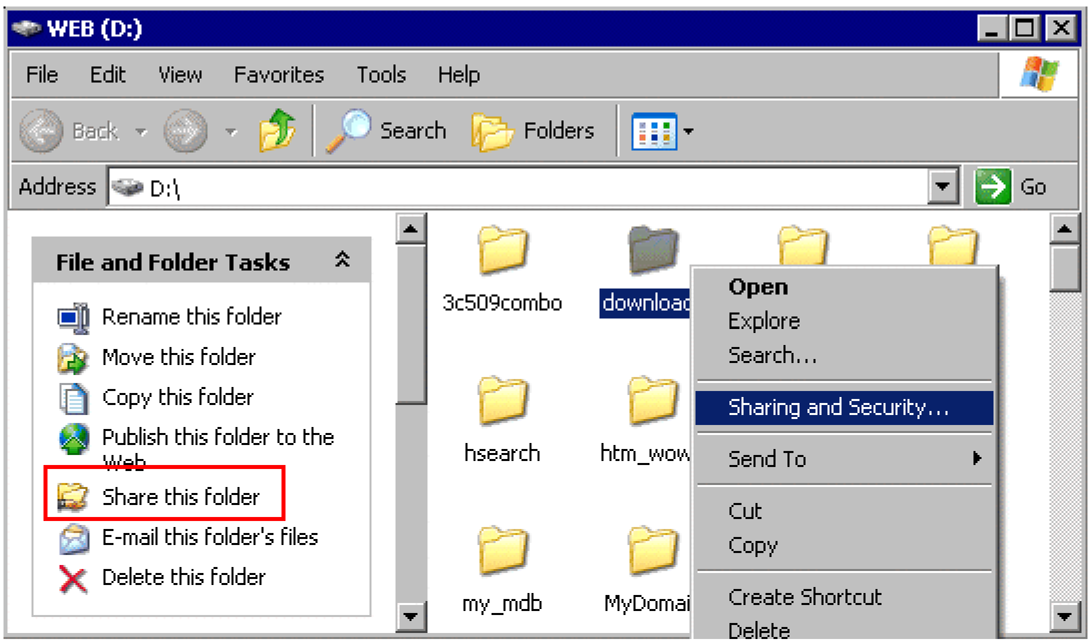
Step 2: Run the Setup Wizard on the Main Computer:

Once the network is set up, you must then select the computer that will serve as the primary computer. This could be your exam computer, a front desk computer, or a dedicated server.

Install the ezChartWriter software on this computer and run the Setup Wizard. When the **Network Setup Wizard** window displays, select the **Install on a Network** option and select the local directory in which the ezChartWriter database resides.

Step 3: Set the Database Folder to Allow Sharing

In order for other computers on your network to access the ezChartWriter database, the folder that the file is located in needs to be visible to other network computers. This process is called **sharing** the folder.



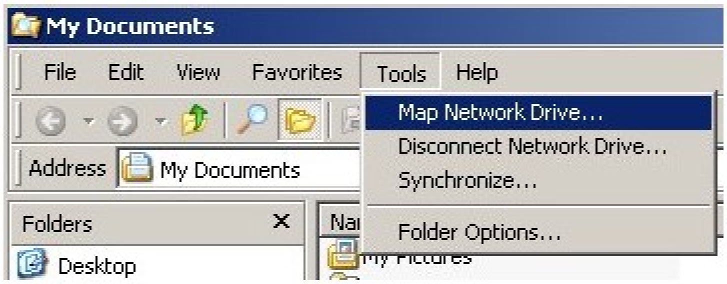
Step 4: Map Network Drive on All Computers that will Run ezChartWriter

On each computer that you intend to install and run ezChartWriter, you must map the previously shared drive on the "main computer" so that it is accessible by the ezWriterSoftware. This process is explained below.

To map a network drive within Windows Explorer:

1. On the Microsoft Windows toolbar, right-click **Start**, and then choose **Explore** to open Windows Explorer.

2. From the **Tools** menu, select **Map Network Drive**.



3. Click the **Browse** button.

4. Click the plus sign until you locate the folder that contains the ezChartWriter database file (on your "primary computer," this is usually the **C:\ezHW_Data** folder. Select the folder and click **OK**.

5. Select an unassigned drive letter. Windows defaults to the first available letter, but you can choose any drive letter that is unassigned. We recommend using the letter "Z," if is available.

6. Select **Reconnect at Logon**.

7. Click **OK**.

8. If the **Finish** operation succeeds, the network drive will be mapped.

9. The ezChartWriter database can now be easily referenced using the new drive (for example, `Z:\ezDB.mdb`).

Troubleshooting Tip: If the network drive cannot be mapped, ensure the folder name is spelled correctly, that this folder was correctly set up for sharing on the remote computer, that the correct username and password have been entered (if necessary), and that the computer network connections are functioning properly.

Step 5: Let ezChartWriter Know Where the Database is Located

Once you have mapped the database path on the local computer, the last step is to let ezChartWriter know this location. The Setup Wizard allows you to specify the location of the database. On the Windows desktop, look for the ezChartWriter icon and double-click it. When the program starts for the first time, the **Network Setup Wizard** will appear. Read the on-screen instructions carefully and choose the newly specified mapped drive as the database location.

Using ezChartWriter

Overview

Once you have properly installed and configured ezChartWriter, you are ready to start using the program.

Starting ezChartWriter

After installation is complete, you can start ezChartWriter by clicking on the icon found on your Windows XP Desktop or from the Start/Programs list. The main screen, similar to that shown below, will appear.

When first run, ezChartWriter may display a Purchase Now and 30-Day Trial extension button, depending on your current license status.

Logging into ezChartWriter

Login Buttons

The login buttons, shown in the following figure, allow users and administrators to sign into the ezChartWriter system:

Administrator Button

The Administrator is the user responsible for overseeing all other user accounts, maintaining the security settings of the software, and inputting clinic details. The System Administrator can reset lost passwords and create/delete new user accounts. The Administrator password is very important and should be stored in a safe and secure location.

User Login Button

The **User Login** button allows a user to sign-in and begin using ezChartWriter. Each user has their own unique username and password combination.

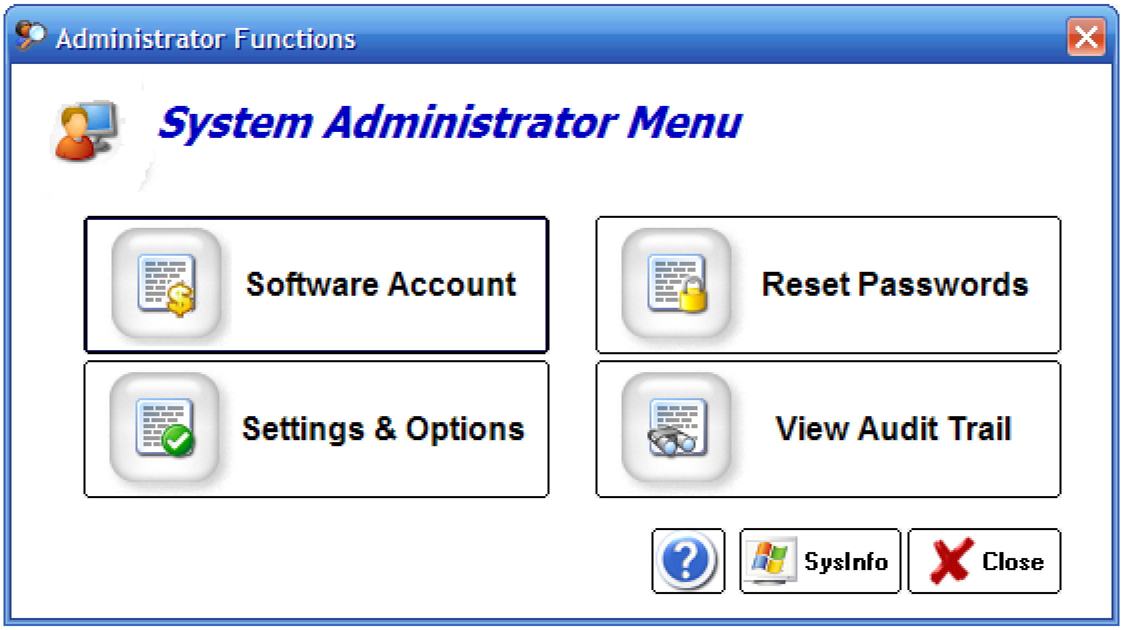
REMEMBER: The first time you login as a user, your Password is the same as the Username you chose.

To meet HIPAA requirements for maintaining secure patient charts, you must keep unauthorized parties out of your patient database. It is a good idea to periodically change the user password. You can change the user password by clicking the **Change Password** label on the user login screen.

IMPORTANT: It is strongly recommended that you NOT leave a password blank.

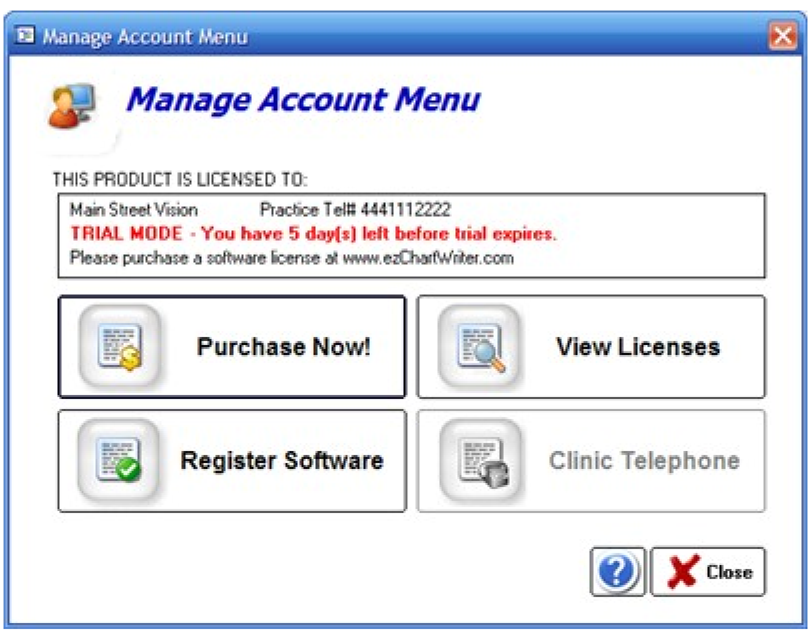
System Administrator Menu

When the Administrator logs into ezChartWriter, the System Administrator Menu window opens with options to to set basic details about the clinic, modify user accounts, and set security settings.



Manage Account

The **Manage Account Menu** window opens when the System Administrator selects **Manage Account** on the **System Administrator Menu**.

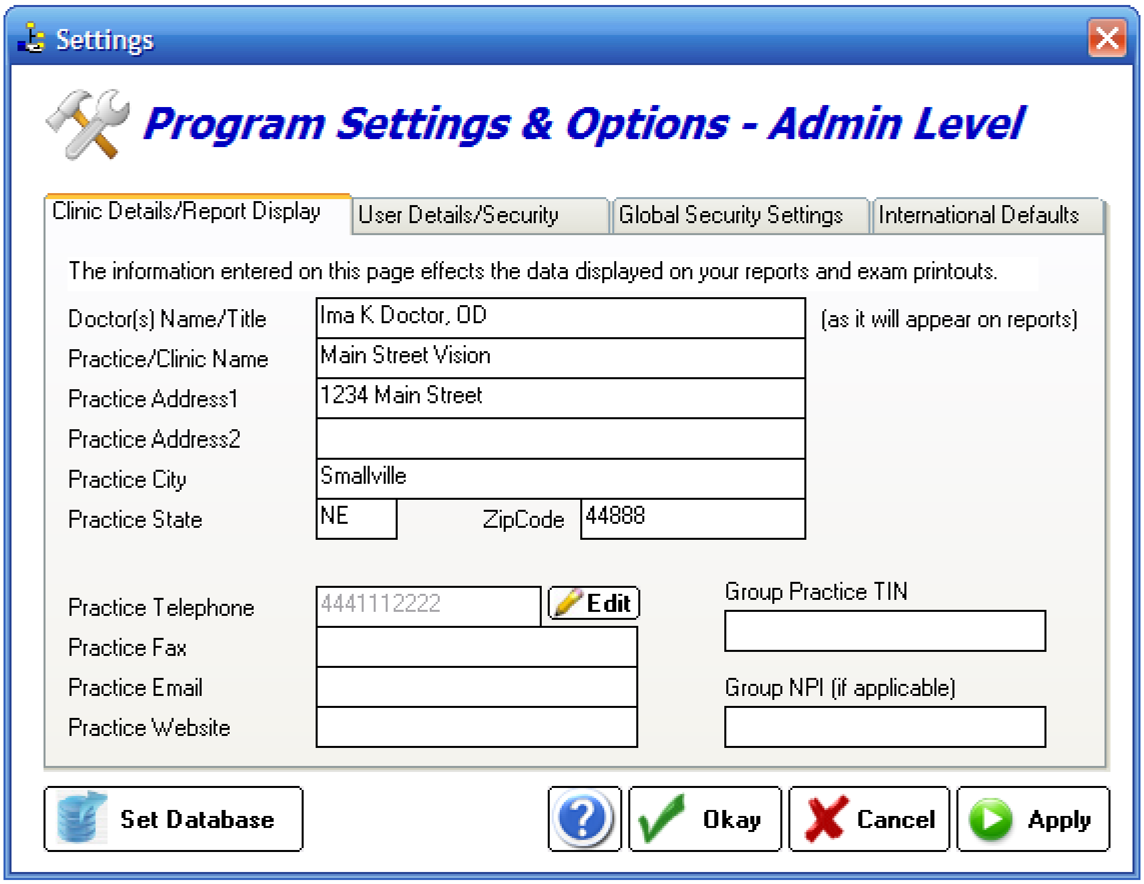


From the **Manage Account Menu** window, the System Administrator can view the software account number, the unique serial number, and the registration status of ezChartWriter. The System Administrator can also purchase additional copies of ezChartWriter (for networking other computers) and enter registration codes from this window.

Admin Settings

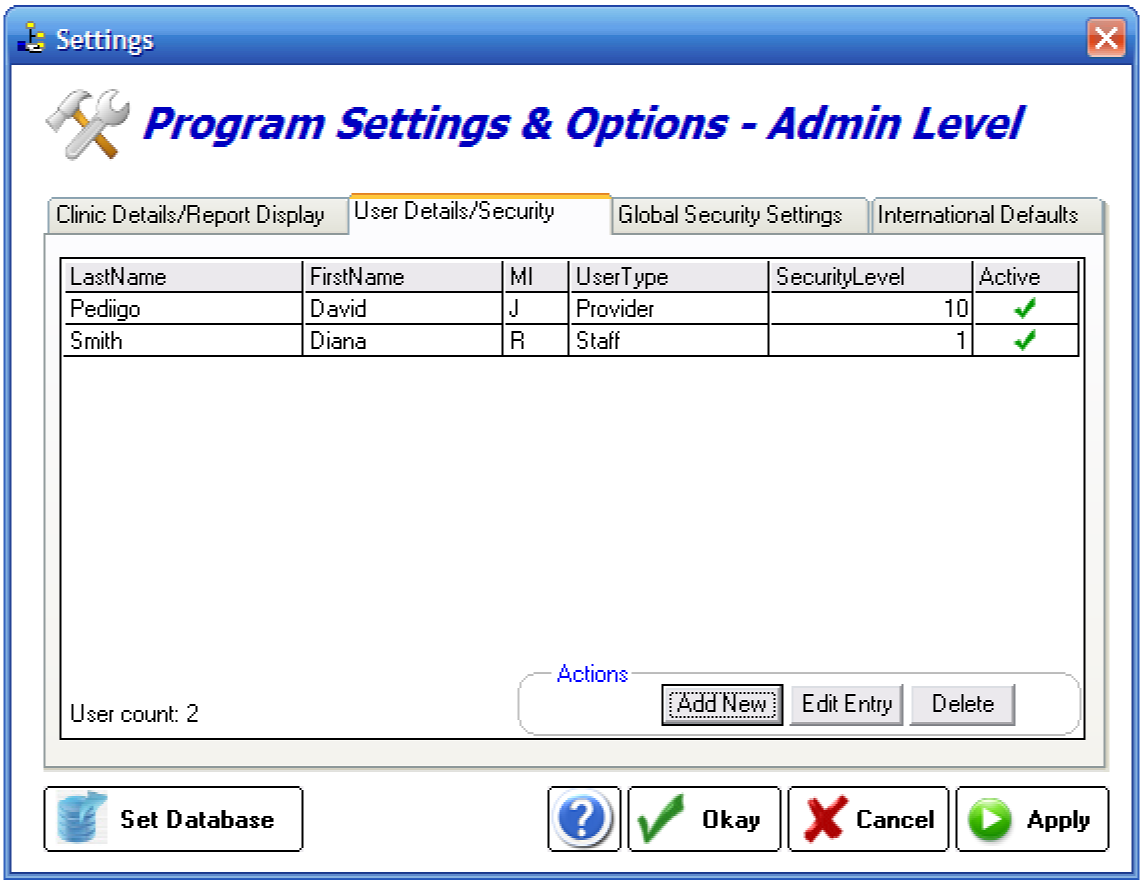
Clinic Details/Reports Display Tab

The **Clinic Details/Report Display** tab displays the general information about the clinic, information entered here will be displayed on various reports that you print. Also, the practice telephone number, which serves as your unique account number, displays on this screen.



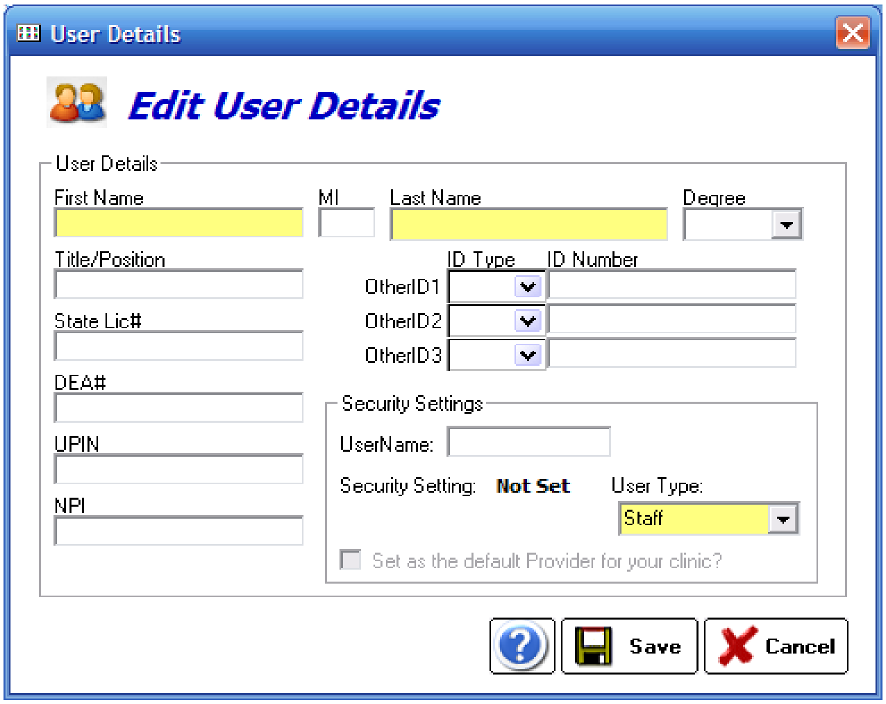
User Details/Security Tab

From the **User Details/Security** tab you can easily add new users by clicking the **Add New** button. You can enter an unlimited number of users (both staff and providers). For each user, be sure to select the appropriate **User Type**, as this determines the default security settings and ability to sign charts.



To edit user details

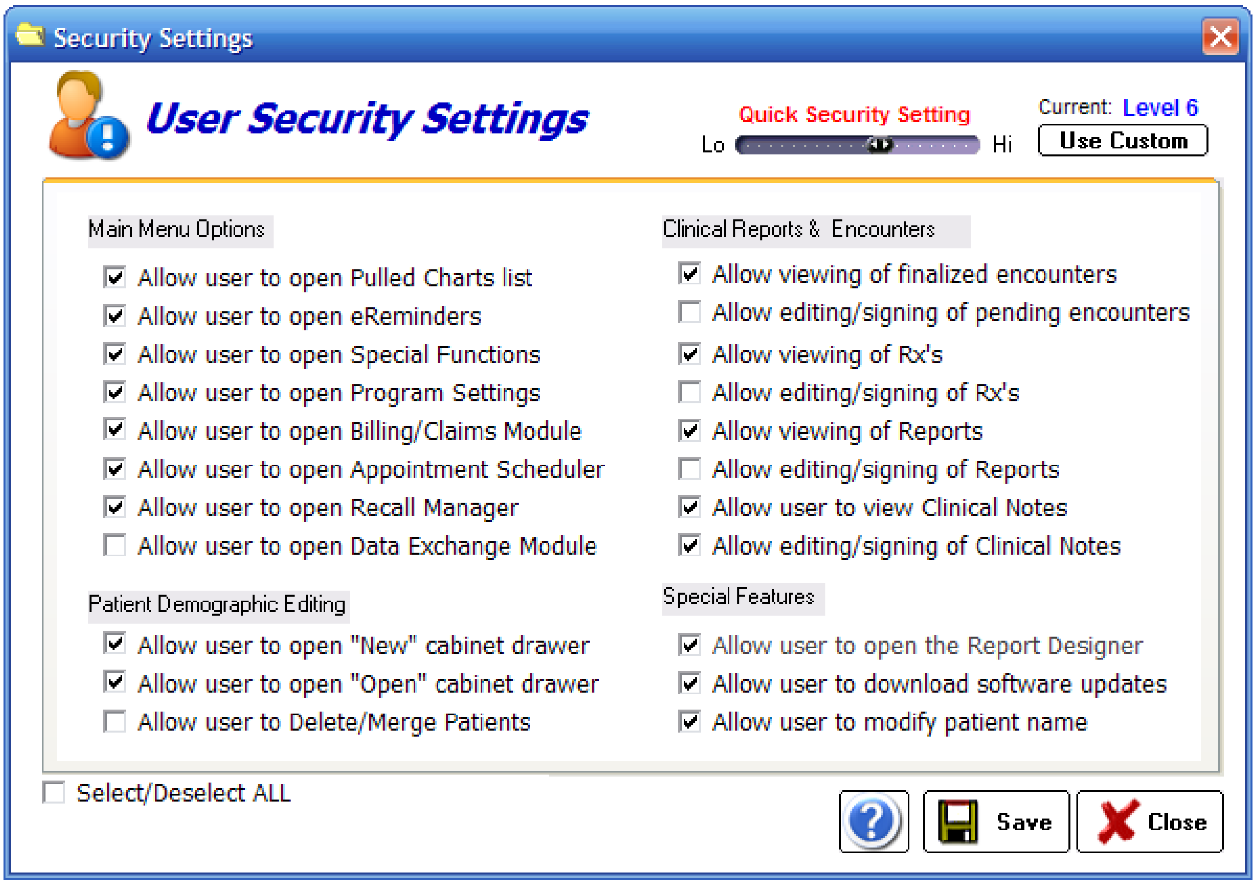
When you click the **Details** button on a row, the **Edit User Details** window opens allowing you to enter information about the user, including professional license numbers, DEA#, and National Provider ID (NPI). It is also possible to edit the username field to prevent duplicate usernames. All usernames, by default, are generated as first initial plus last name. The password can be set on this screen, although typically this is done by the user on the **USER LOGIN** window. If a user is of type Provider, the **Set as the DEFAULT provider for this location** checkbox can be selected, which results in the user/provider being set as the default selection on all reports and Rx's.



If you wish to delete a user, you can do so by clicking the **Delete User** button on the main User list. Alternatively, you can set the user's security access level to zero (described in User Security section). This keeps them on the user list, but prevents the use of any functions.

To set user security

You can set the individual security levels for each user by clicking the **Security** button on the **User Details/Security** tab. When the **User Security Settings** window opens, you can select the security settings define which parts of the software application a user may access. For example, a staff member may have the ability to view/print Rx's, but not the ability to edit or sign-off on them. You may select the settings individually or use the **Quick Security Setting** sliderbar located at the top of the **User Security Settings** window. The quick settings reflect typical usage, with a provider likely given a setting of 8 or higher, and a staff member a 4 or 5.

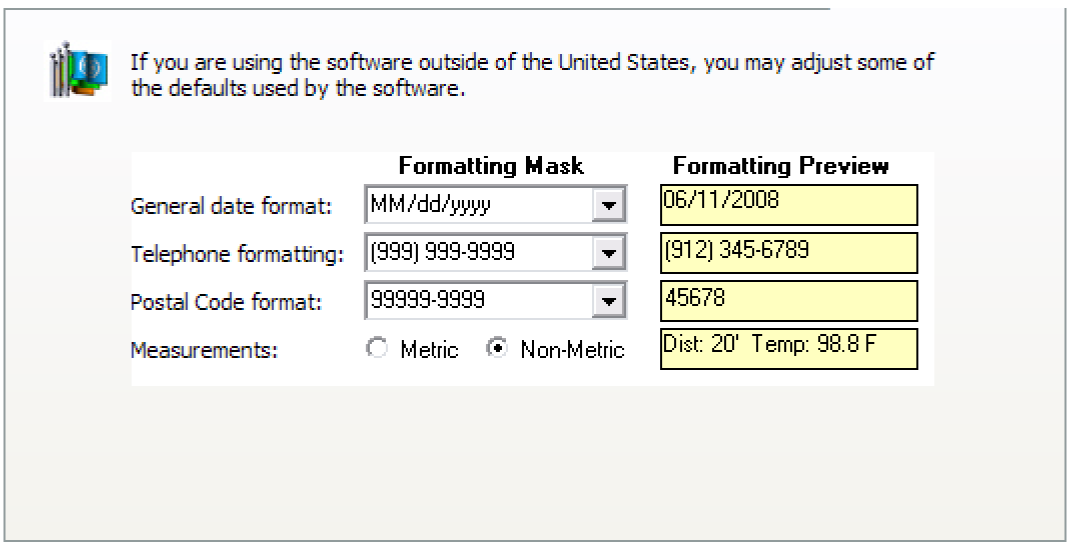


Global Security Settings Tab

General security settings that apply to the entire program can be set on the **Global Security Settings** tab. The automatic logout time specifies how long to wait before logging off the current user due to inactivity.

International Defaults Tab

If you reside in a country other than the USA, you must set the defaults for properly displaying your data (dates, telephone numbers, postal codes and metric measurements).



Accessing the Setup Wizard

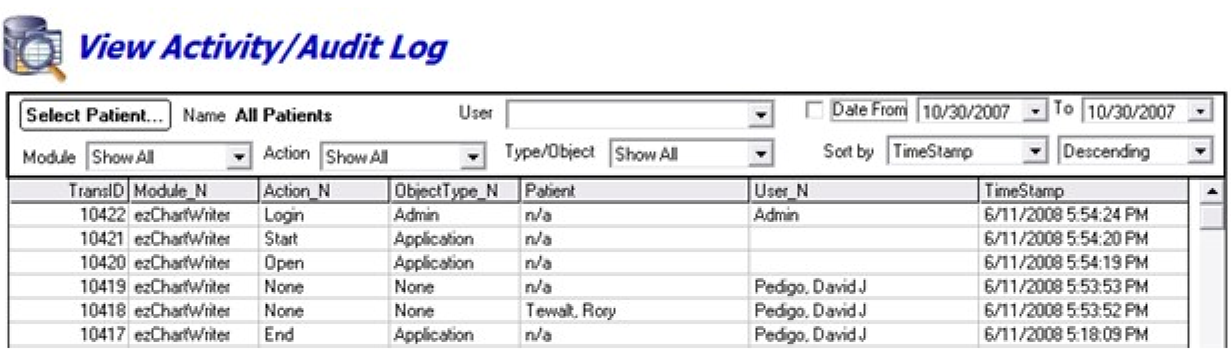
The System Administrator can click the **Setup Wizard** button at the bottom-left of the Admin Settings window to access the Setup Wizard. The Setup Wizard may need to be run if the main database location changes or the administrator needs to be changed. See the section on the Setup Wizard further details.

Reset User Passwords

When you select the **Rest User Passwords** button, the **Reset Password Options** window opens to allows the System Administrator to quickly reset one or all of the user passwords.

Viewing the Audit Log

By default, ezChartWriter tracks all user activity (such as who opened a chart at what time). Click the View Audit Trail button to access this feature.



User Functions

The **User Login** window allows a user to sign-in and begin using ezChartWriter. Each user has their own unique username and password combination.

Main User Menu

Once a user logs in, the Main Menu screen displays:

NOTE: The File Cabinet turns blue, signifying that it is UNLOCKED.

The following are the options available on the Main User Menu:

- File Cabinet - NEW: Opens a new, blank patient chart.
- File Cabinet - OPEN: Displays an alphabetical list of all patients currently in the database.
- Pulled Patient Charts: Displays any open charts that have been "pulled out" of the File Cabinet.
- Message Box/eReminders: Displays any eReminders that have come due for a patient.
- Special Functions: Provides access to special utilities and software functions, such as database backup and compact/repair, the Rolodex, the Report Designer, and various others.
- Program Settings: Allows the user to modify their own information and to set various program options, such as date formats, and report titles. Some changes affect all users while others apply only to the specified user account.

File Cabinet - "NEW" Drawer

You use the File Cabinet to open patient charts or to create new ones. When ezChartWriter first opens, the File Cabinet is locked (displays in gray). The File Cabinet is unlocked (turns blue) when a user logs into the program.

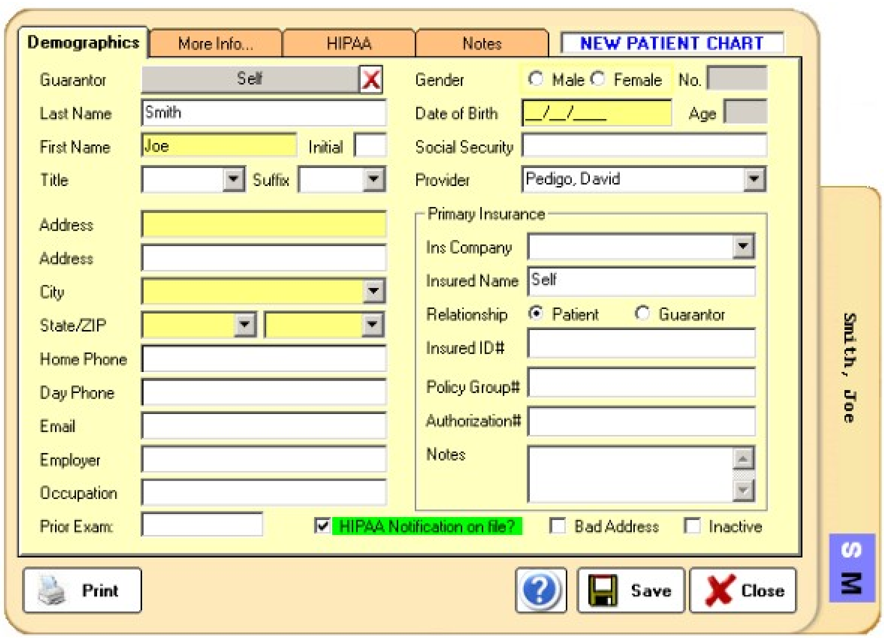
To create a brand new patient chart, click on the **NEW** drawer of the File Cabinet or press **CTRL+N** on the keyboard. A blank chart will appear onscreen. If you plan on using ezChartWriter, or one of the other ezHealthWare applications, to track full patient information or to track insurance details, we recommend fully entering all patient details. If you use another software program to manage your patient data, then you only need to enter the patient name, gender and DOB to generate Rx's and most reports. The Patient Chart is composed of four main areas: **Demographics**, **More Info**, **HIPAA**, and **Notes**. Each area is discussed in the following sections.

Patient Demographics

Demographics Tab

Almost 99% of the necessary information about the patient is visible on this screen. The yellow highlighted fields are the bare minimum data we recommend collecting, although only the full name is required to create the chart. Note, the **Guarantor** button (set to **Self** on a blank chart at the top). If this patient is using insurance and has an existing patient as the guarantor, then using this tool will quickly import their data (for example, after selecting the guarantor, click the arrow by the address to copy it over). The insurance drop-down list gives all available insurances (see the section on Program Settings to edit this list). The only fields on this screen you cannot edit are the **Age** field (auto-calculated, based on DOB) and the chart **No.** field (auto-assigned). Both of these fields are shaded in grey.

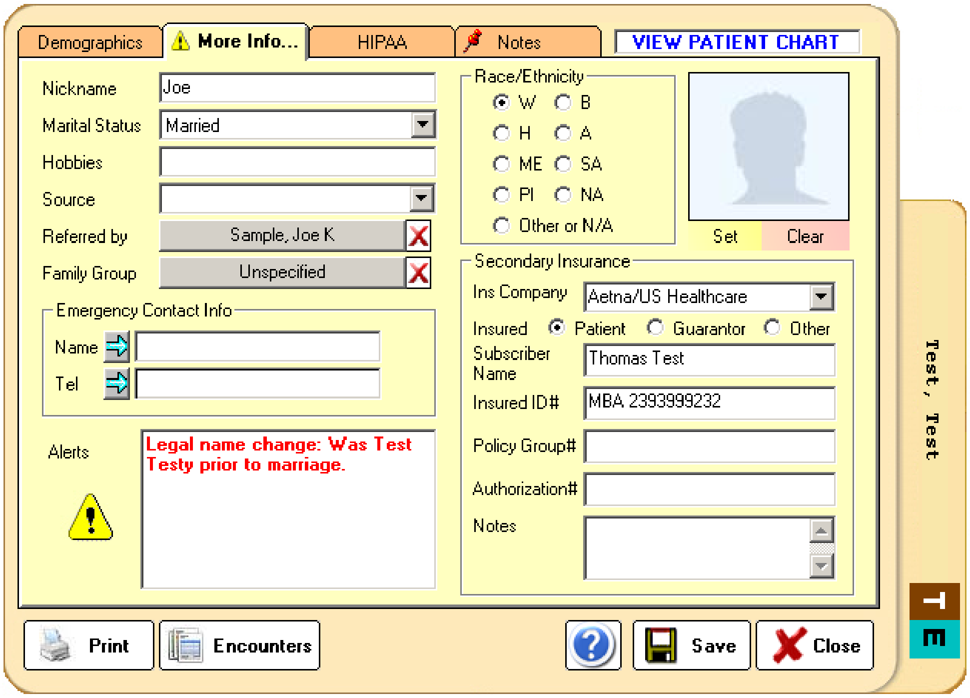
The **Print** button on the lower left corner prints a simple summary of the patient demographics.



Patient More Info...

More Info Tab

The **More Info** tab allows access to secondary information about the patient, as well as the patient photo (if used). Secondary insurance information can also be entered on this screen.

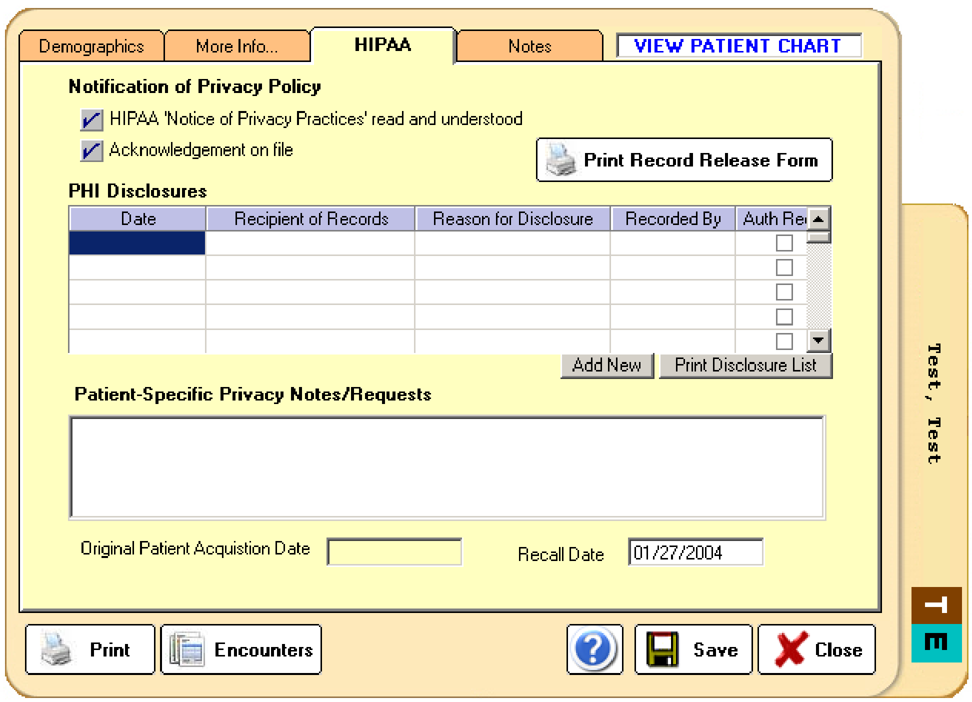


Patient HIPAA Disclosures

HIPAA Tab

In order to help you comply with HIPAA requirements, the following features have been added to ezChartWriter:

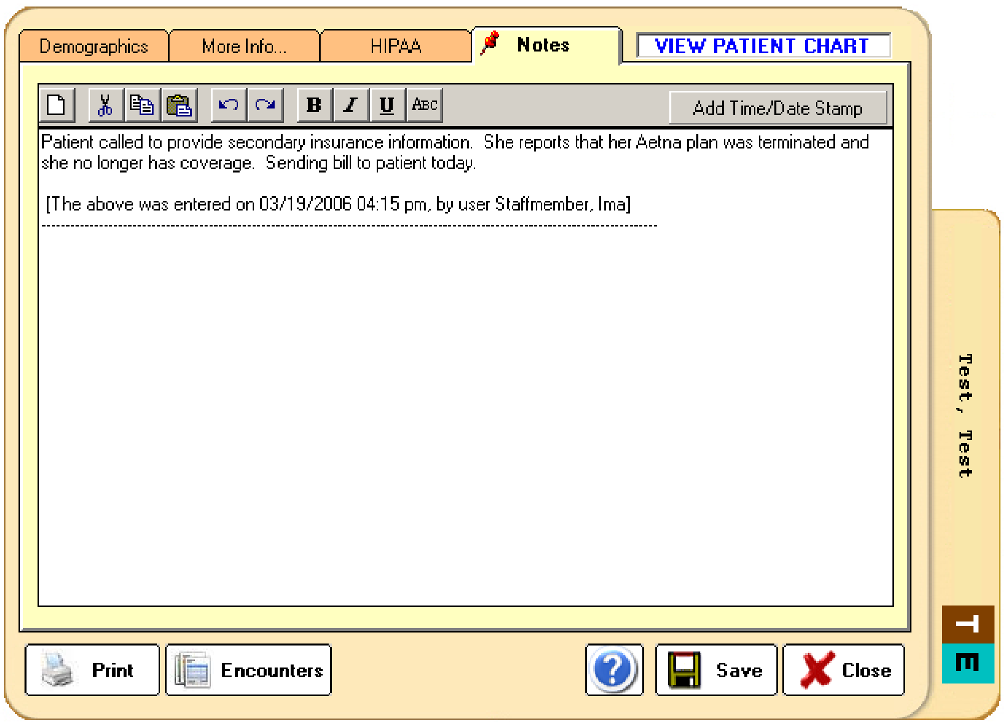
- Notification option that indicates a patient received, read, and understood the HIPAA Notice of Privacy Practices agreement.
- Track incoming requests for protected patient data.
- Print a custom Record Release form for the current patient. here is also a note section to indicate HIPAA related requests.



Patient Notes (Non-Clinical)

Notes Tab

The **Notes** tab allows non-clinical notes (for example, billing problems and special requests) to be documented. After typing the note, the user can click the **Add Time/Date Stamp** button to add the user's name and time of note.



File Cabinet - OPEN Drawer

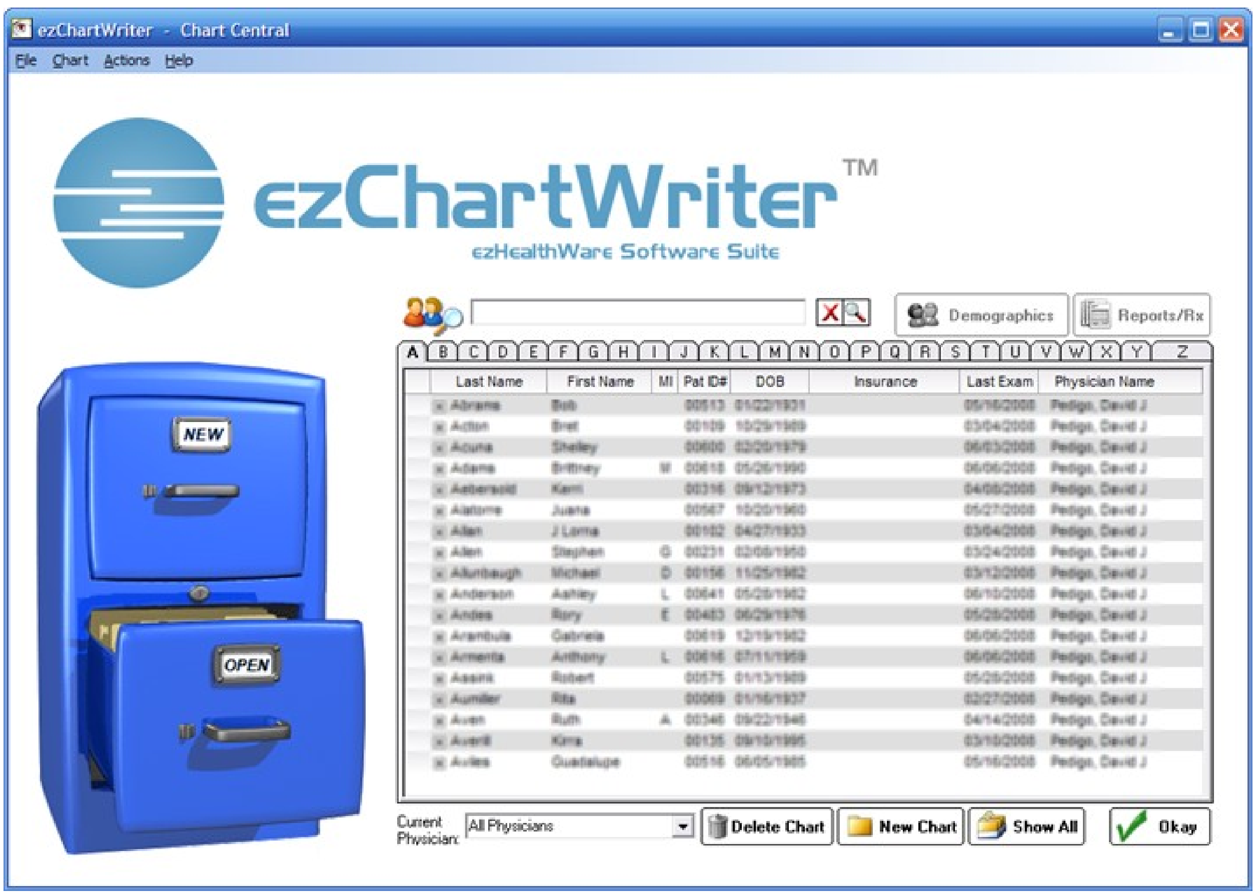
File Cabinet - "OPEN" Drawer

To find an existing patient chart, click the OPEN drawer of the File Cabinet. A tabbed alphabetical list of patients appears. To find a specific patient you may use any of the following methods:

- Type the patients name in the text box. As you type letters a drop-down list of the closest matches appears. You may 1) Continue typing to further limit the matching patients, 2) Use the down arrow key to move to the correct patient, or 3) Select the correct patient with the mouse.

- Click the appropriate letter tab which corresponds to the patient last name and, using the mouse or down arrow key, scroll to the correct name. Then double-click the name or press the **Enter** key.

- To do an advanced search, click on the **Patient Search** button. A dialog will display allowing you to search with different combinations of names, date of birth, patient ID or address. Once you click the **Find** button, any matching results are displayed in the original tabbed patient list.



Other features of the alphabetical patient list include the ability to quickly view address and telephone information (click the small plus sign), as well as the ability to delete patients, mark as inactive, mark as bad address and merge charts. The latter features can be accessed by highlighting the patient you wish to modify and RIGHT-CLICKING the name to bring up a menu of choices.

NOTE: Make sure the patient name is highlighted blue in order to see the menu choices.

PULL CHART - Pulls the patient chart from the File Cabinet and shows it in the Pulled Chart List. No other action is taken.

VIEW DEMOGRAPHICS - Opens the patient chart for viewing. The chart is automatically moved to the Pulled Chart List if you click **Save** on the chart; other wise it is re-filed in the File Cabinet.

VIEW REPORTS/RX'S - Jumps directly to the list of reports, Rx's and notes for the selected patient. Also automatically "pulls" the chart to the Pulled Chart List.

WRITE A NOTE - Opens the **Clinical Note Writer** utility so that notes can be entered (see the section on entering clinical notes). he patient chart is also automatically pulled and displayed in the Pulled Chart List.

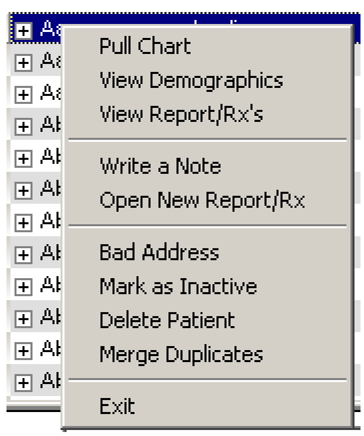
OPEN NEW REPORT/Rx - Opens the **Encounter List** displaying the **Create New dialog**. You may create a new Rx, Report, or Note on this page. The patient chart is automatically pulled and is available on the Pulled Chart List..

BAD ADDRESS - Quickly mark the patient as a bad address without opening or pulling the chart.

MARK AS INACTIVE - Mark the patient as inactive without pulling the chart.

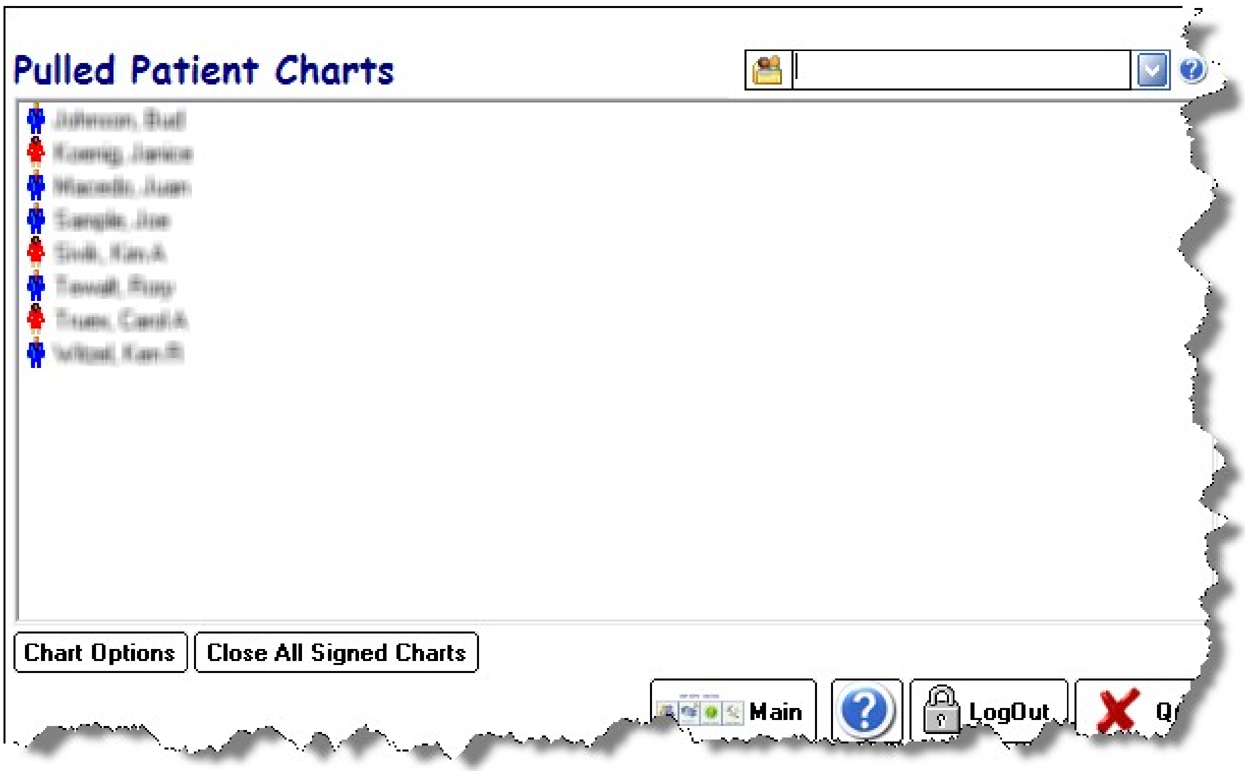
DELETE PATIENT - If the patient has no encounters, this will allow the patient chart to be permanently deleted (assuming the user has the necessary security level).

MERGE DUPLICATES - Allows the merging of two patient charts (for instance, if a second chart was created using a slightly misspelled name). The merged charts will combine all Reports, Rx's and Notes and will keep the demographics of the first chart. Cannot be undone once completed.

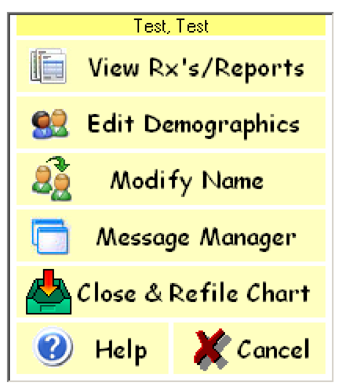


Pulled Patient Charts

The **Pulled Patient Charts** area displays a list of all patients that have been pulled from the File Cabinet. The list is not specific for any particular user, and just like a real stack of charts, represents all charts pulled by all users to a central location.



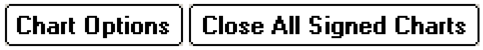
You may perform various functions on the pulled chart by highlighting the patient's name and either 1) clicking the **Chart Options** button, or 2) right clicking the patient name. A menu of options appears with the following choices:



- **View Rx's/Reports** – Select this option to view a list of prescriptions/reports.
- **Edit Demographics** – Select this option to edit demographic information.
- **Modify Name** – Select this option to modify a patient's name.

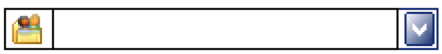
- **Message Manager** – Select this option send a message to the manager.
- **Close/Refile Chart** – Select this option to close/refile a patient's chart.

Other features available on the **Pulled Charts** area include the **Close All Signed Charts** button, the **Quicklink Search Bar**, the **Main Menu**, and **Logout** buttons.



Close all Signed Charts – If you have a number of charts pulled, this is a quick way to close them without individually clicking each one. Note that nay charts with pending activity will remain open until finalized.

QuickLink Tool – The Q-Link box allows entry of some, or all, of a patient's name (last, first) to quickly pull the chart. You can enter as little as a single letter or a full name. The more characters you enter, the more unique the search results. To find a patient named "Kevin Smith," simply enter the letters "sm,k." You could even use the "Wildcard" asterick character to find all patients with the first name "Kevin" in the database: enter "*, Kevin". The Q-Link tool also accepts other data such as chart numbers, date of birth ,and keystroke commands (for example, use "/n" to open a new chart or "?" to open **Help**.

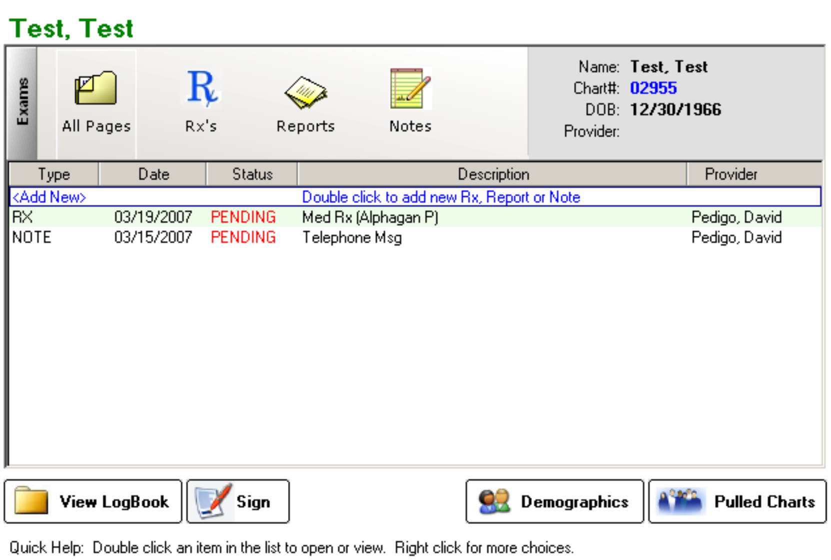


Main Menu – Displays the Main Menu options screen.

LogOut – Logs out he current user.

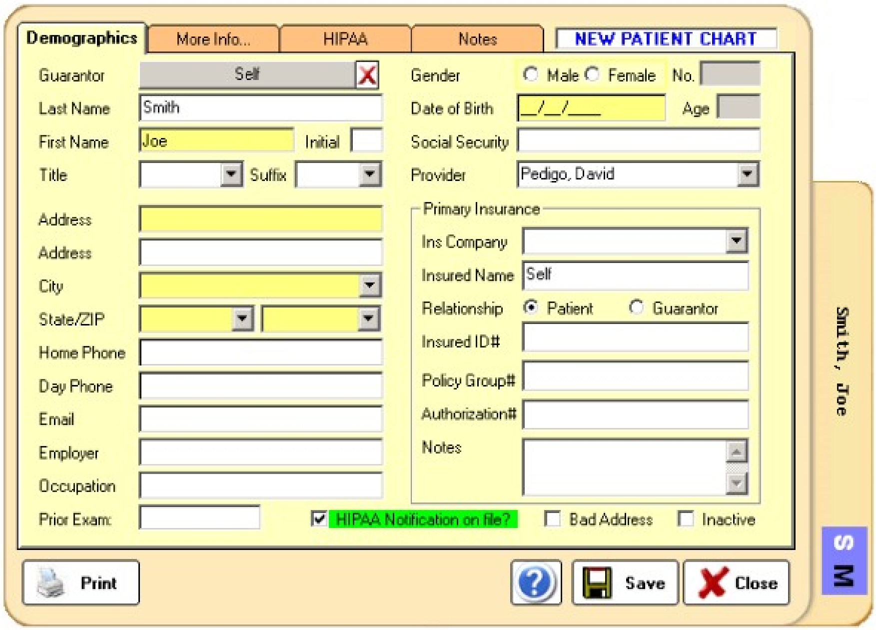
View RX's/Reports

When you select the View **RX's/Reports** option, a list of available Reports, Rx's, and clinical notes for the patient displays.



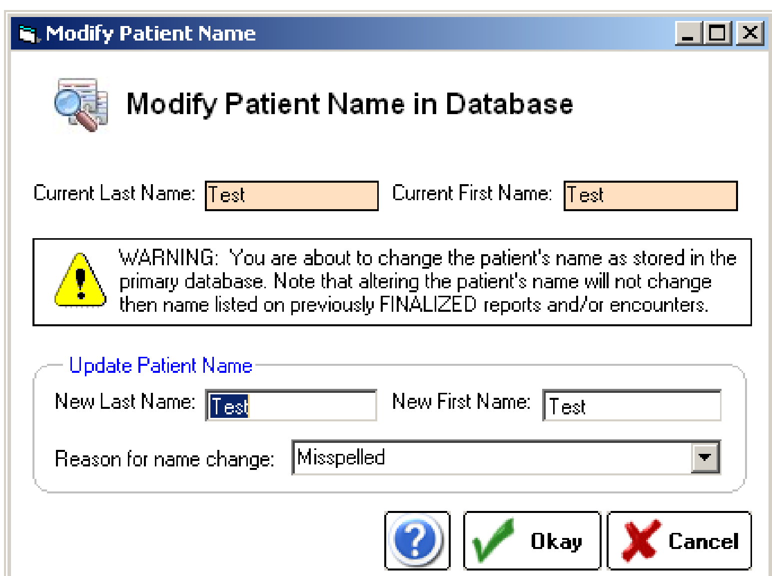
Edit Demographics

Selecting the Edit Demographics option opens the patient chart for viewing or editing.



Modify Name

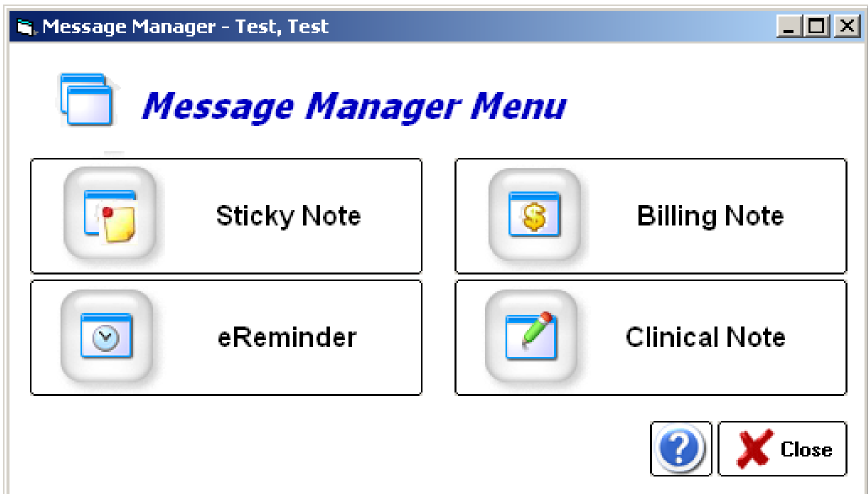
Selecting Modify Name opens a utility to modify an existing patient name. Note that once a patient chart is created, modification of the first and last name can ONLY be done with this tool. A log of all name modifications is saved.



Message Manager

Selecting the Message Manager option opens the Message Manager Menu. The following four types of messages are available:

- Sticky Note
- Billing Note
- e-Reminder
- Clinical Note

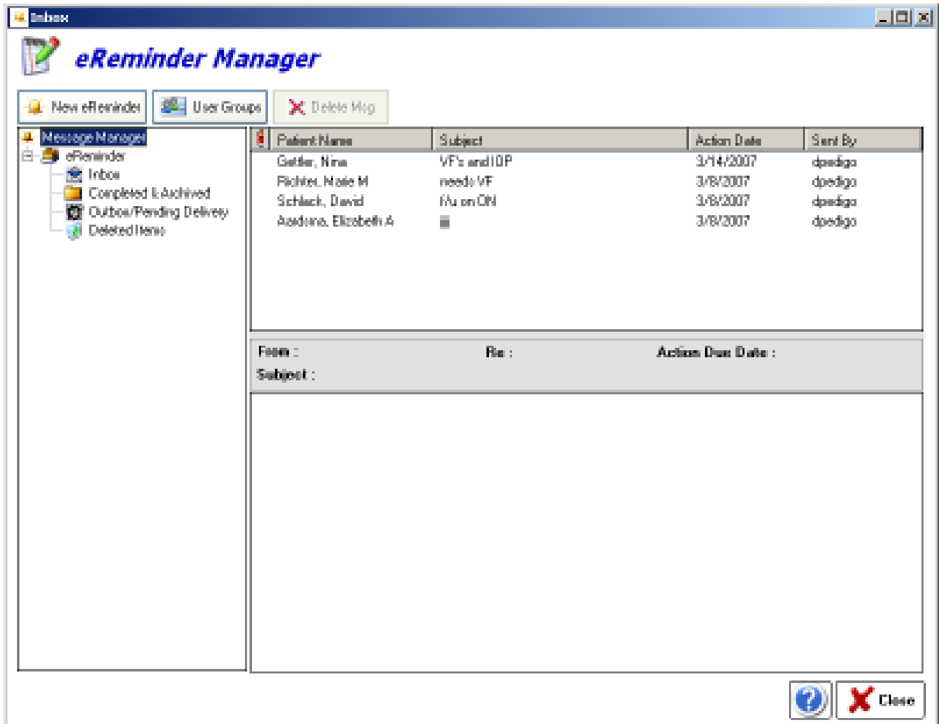


Close/Re-File Chart

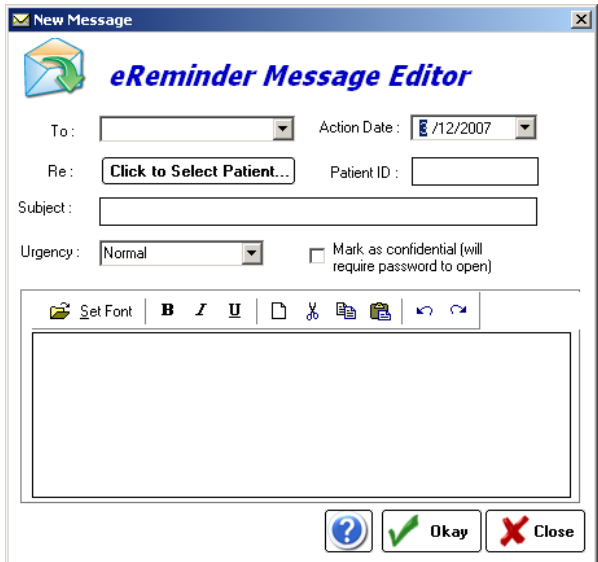
Selecting this option closes out the current patient chart back in to the Filing Cabinet.

Message Box/eReminders

Clicking the message box brings up the **e-Reminder Manager** window. From this window you can create new reminders, view a list of pending e-Reminders, and edit User Groups.



New e-Reminder – Clicking the **New eReminder** button opens the **eReminderMessage Editor**. You must first select a recipient of the newly created eReminder. Much like regular e-mail, the system delivers your eReminder to the recipients Inbox when the eReminder “trigger date” is reached. Until that time, the message remains visible in your Outbox until it is delivered. The **Action Date** is the date you desire the eReminder to be delivered, and obviously must be some date in the future.



Next you must select the patient that this eReminder references. All eReminders must have an associated patient. You must also enter a subject line that indicated the reason for the eReminder (for example, **Patient Needs to Have Lab Test Repeated**). You may optionally select an **Urgency** level (**Normal** or **Urgent**), which dictates how the messages are sorted. If additional information needs to be presented, the text box allows formatted text data to be entered. Lastly, if the data is very confidential you may check the box require the recipient to re-enter their password before viewing the full eReminder details.

User Groups – Displays the **User Group Lists** window. Each user may create his or her own custom groups of recipients. For example, an "All" group could be created to broadcast an eReminder to all users.

E-Reminder List View – In the split screen view, the tip list shows the available eReminders (can be easily sorted by clicking the headings). When an eReminder is clicked, the corresponding details are displayed in the lower box. If an eReminder in the Inbox is clicked, an additional Action Bar displays at the bottom of the window. The available actions are:

Mark as Completed – If the eReminder has been acted upon and/or otherwise done, click the button. The eReminder is automatically removed from the Inbox and placed in the Completed/Archived folder.

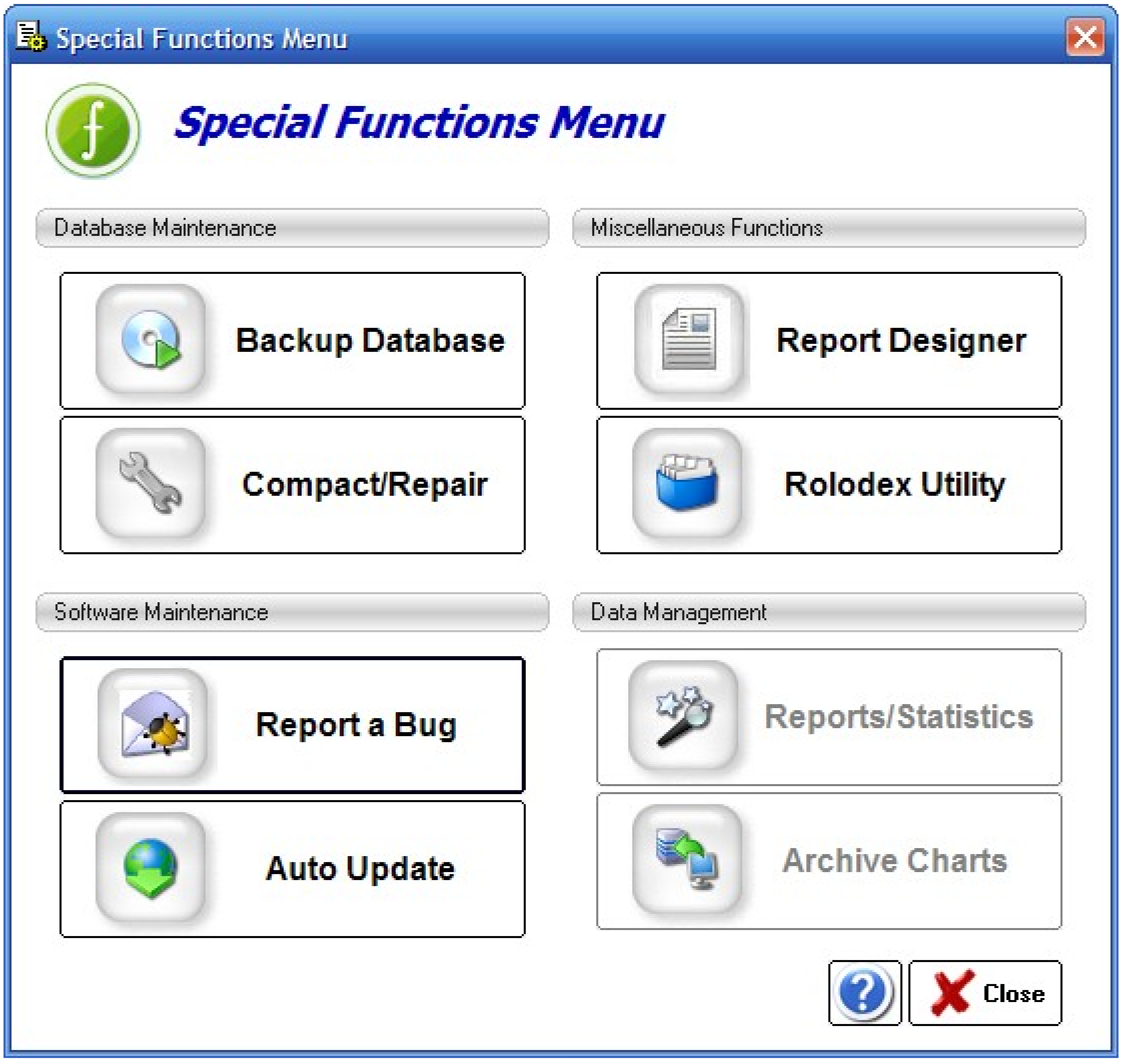
Discard – If the eReminder is no longer needed or relevant, click the **Discard** button. The eReminder is moved to the **Deleted Items** folder.

Assign To Another User – If you want to have another user assigned to action on the eReminder, simply select another user on the drop-down menu.

Reset Due Date – To reset the eReminder to some future date, simply select a new date on the calendar display.

Special Functions

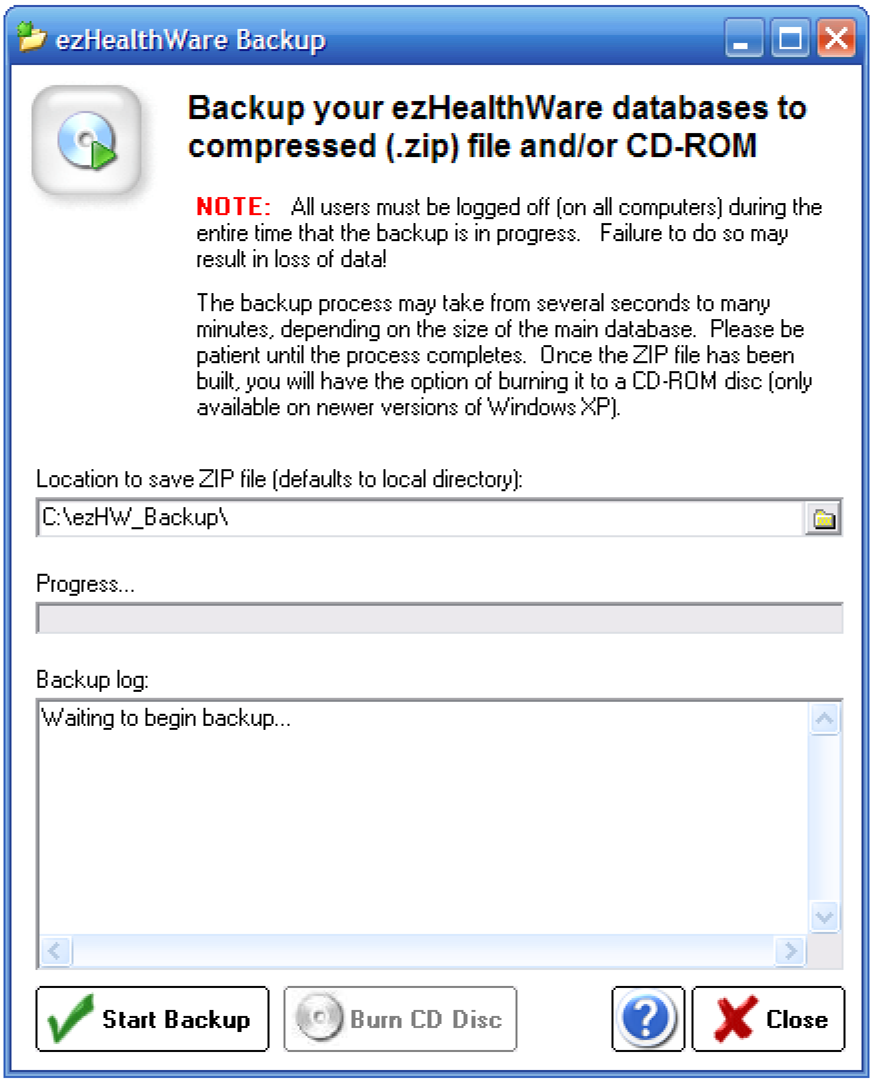
The **Special Functions Menu** displays the following options:



Backup Database

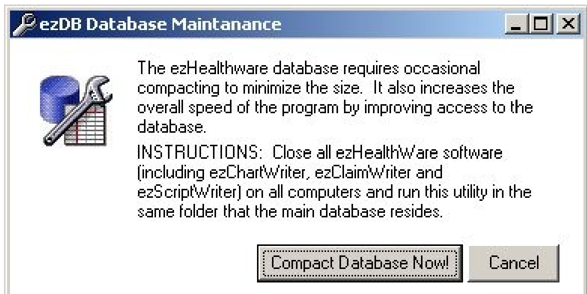
Backup Database Utility

Utility to create a compressed backup copy of ezChartWriter's date files. We recommend that you perform a backup daily and save the compressed file on removable media (CD Rom, USB Flash Drive, or another network drive).



Compact/Repair Database

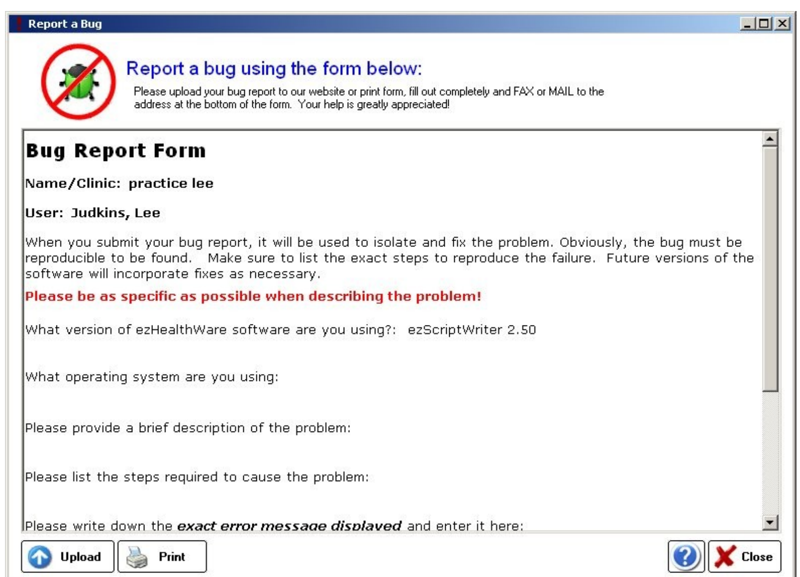
Compact/Repair Database Utility



Utility to compress (compact) the database and repair minor data errors. e recommend you run the Compact/Repair utility about once a week to keep your data files in good condition. It's advisable to run the Backup utility before the Compact/Repair utility.

Report A Bug

Report Bug Utility

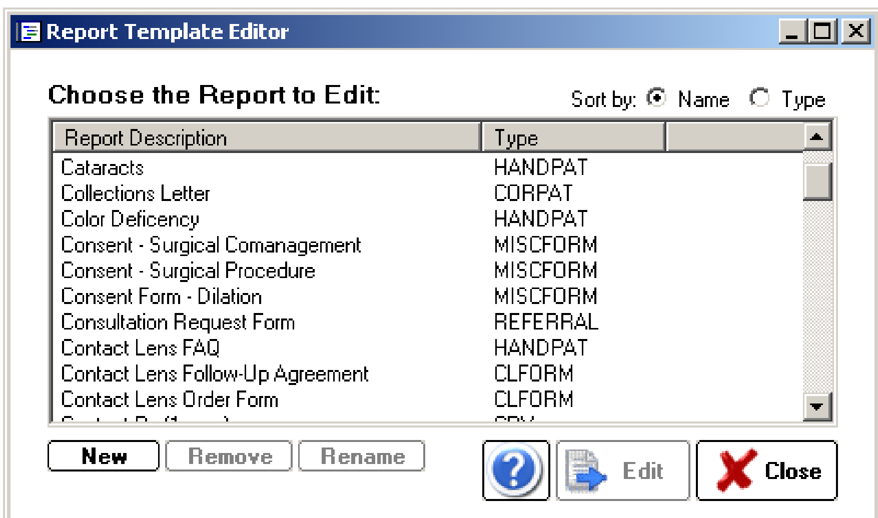


If you encounter a persistent error or glitch (programmers call them “bugs”), you can upload or fax a report to us so that the issue may be resolved. Simply follow the on-screen instructions to generate the bug report.

Report Designer

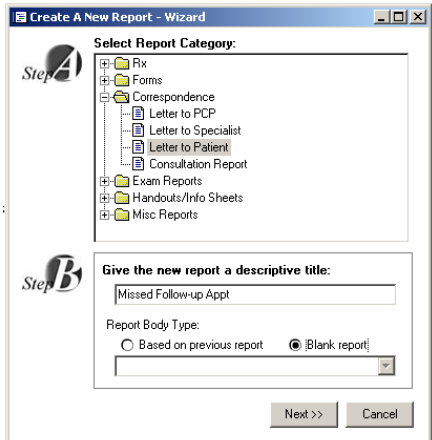
Report Designer Utility

The Report Designer allows creation and editing of the various reports and Rx formats available in ezChartWriter. When the report template screen finishes loading, you will notice that the reports are listed alphabetically by name and that each has a specific category name associated with the report. You can easily switch between an alphabetized listing of report name or by category by clicking on the heading bar. To edit an existing report, click on the name and then click the **Edit** button (or, alternatively, just double-click the report name). To create a new report click the **New** button and a dialog will appear to guide you through creating a new report:



Step A: Select an appropriate category for the report. If the report does not easily fit one of the pre-defined categories, use the **Misc. Reports** category.

Step B: Give the report a unique and descriptive name (for example, “Letter to Patient-Importance of Diabetic Control”). You may also indicate whether this report will be based on a prior report format or blank report. Even if you choose a blank report, you can easily copy and paste data from your favorite word processing program.



When the report, whether new or editing an existing report, opens, you will be in the Report Designer mode. The Designer looks and acts just like the regular report viewer with just a few important differences. The first difference is that the data you are working on is a Template from which your other reports are built. As such, the Template needs to be told what data to display.

There are three types of data you can insert into your template:

Static Text – This is text that does not change and will be included in every report of that type. Examples include headings and labels such as “Date of Exam:” and “Report of Findings:”. You create static text by simply typing text in the Designer just like a work processor.

Dynamic Text (or fields) – These are special codes embedded in your report document that tells ezChartWriter to insert text appropriate to, for example, a particular patient or provider, each Field has a specific format and looks like this:

Dear [[Name Title]][[Last Name]]:

The word “Dear” and the semi-colon “:” are static text. However, the double-bracketed fields indicate placeholders for data to be inserted, in this case the patients salutation (for example, Mr. or Mrs.) and last name. Using the list of pre-defined Fields, it is possible to generate grammatically correct and fully personalized letters, handouts and miscellaneous reports. Using even more specialized Fields such as [[MedRx]] you can create Rx’s for your patients. Many sample templates for various reports, Rx’s and letters have been created for you. Simply copy the old report to the new and edit the text and Fields as needed.

[[DrNameFull]]
[[PracticeName]]
[[PracticeFullAddress]]
Tel [[PracticeTel]] Fax [[PracticeFax]]

[[Today Date]]

[[RolodexName]]	
[[RolodexClinic]]	
[[RolodexAddress]]	
[[RolodexCityStateZip]]	

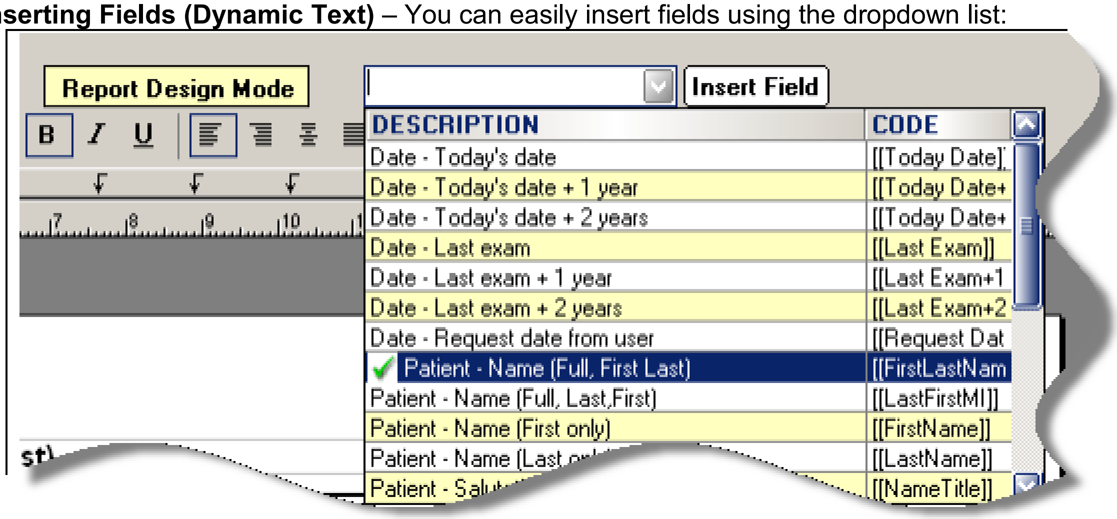
RE: [[LastFirstMI]]
DOB [[DOB]]

Dear Dr. [[RolodexName]]:

I recently saw [[FirstName]], a [[Age]] year old [[Gender]], for a comprehensive eye examination. As you know, she has a history of NIDDM, as well as hypertension. She states that she is currently taking [[Medications Taken]].

On [[his/her]] visit today, [[he/she]] had best corrected acuities of 20/20 in each eye. Pupils, ocular motilities and anterior segment were normal. The dilated examination revealed a normal fundus in both eyes. No neovasularization at the disc or elsewhere was noted. No retinal vascular abnormalities were evident.

Inserting Fields (Dynamic Text) – You can easily insert fields using the dropdown list:

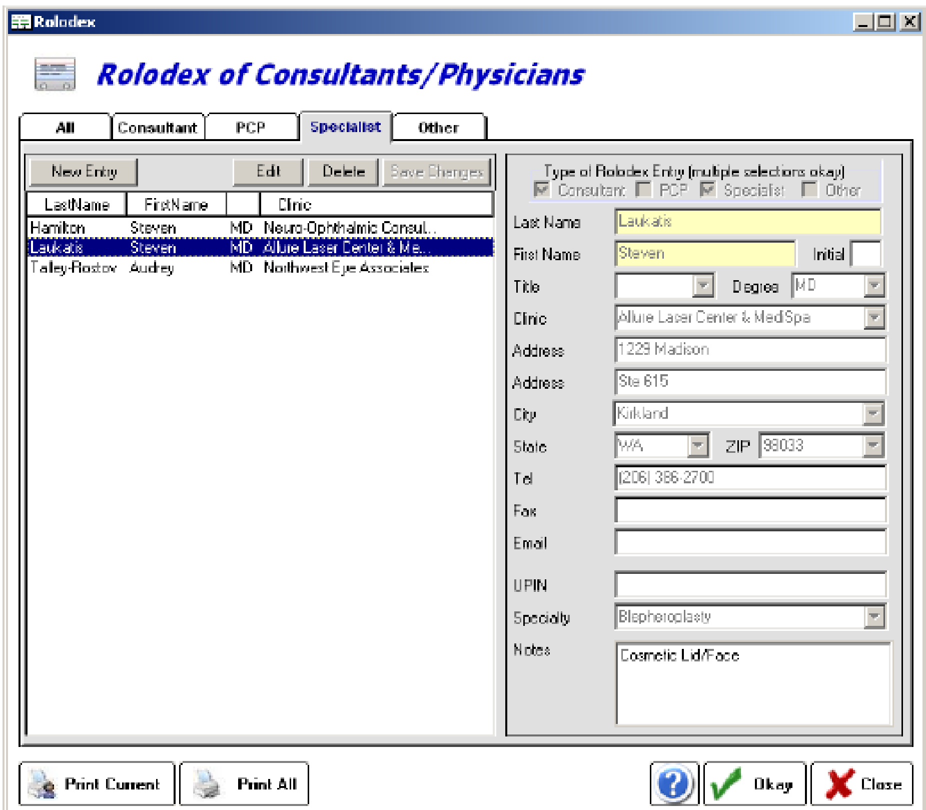


Images – In addition addition to static text and FIELDS, you may also insert static images in your documents. These may be logos or signature blocks or any other image you desire. Please note, however, that images consume lots of disc space and if you embed a large image in a report, then each and every report you save will have a copy of that image saved to the database. Typically, images that are embedded should be in ".jpg" or similar format, since they are highly compressed.

Rolodex

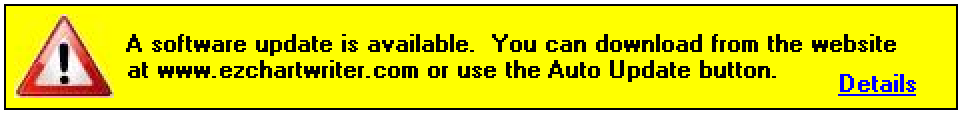
Rolodex Utility

Allows managing of all your healthcare provider contacts (for example, consultants, PCP's, specialists and others). The Rolodex is automatically launched when reports include the Rolodex Field (for example, when writing a letter to a patient's PCP). You can add or modify existing entries simply by clicking the action buttons at the top.



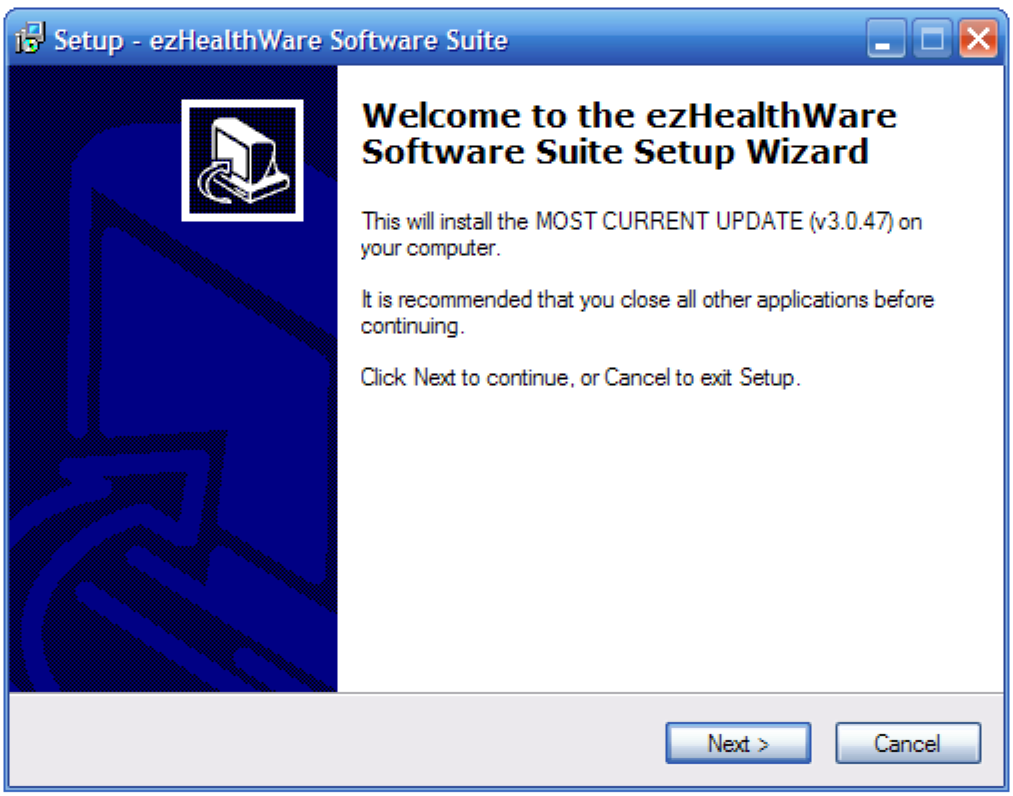
Auto Update

Occasionally you will notice that an Alert will appear at the bottom of the ezChartWriter Login screen alerting you that an update to the software is available (assuming you have Internet connection for this check to occur):



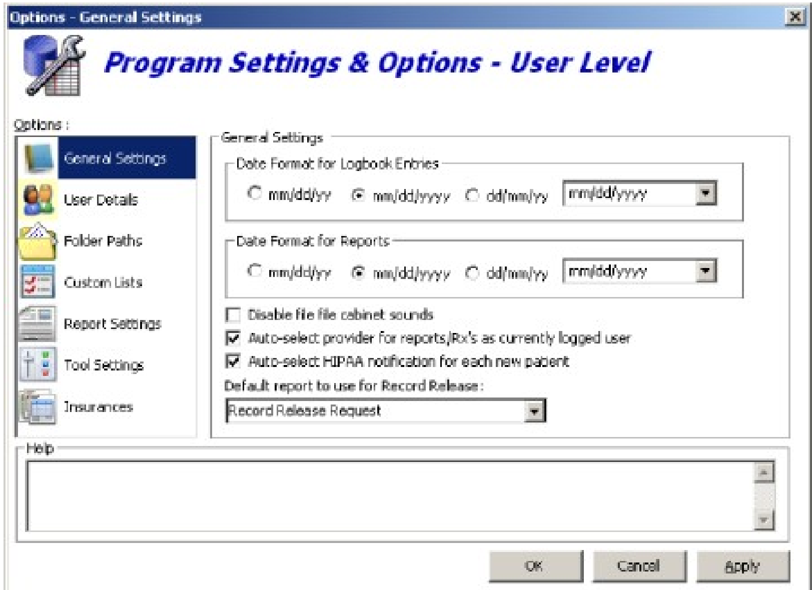
Auto Update Utility

This utility checks the Internet site for any updates to the software. If a newer version is found it is automatically downloaded and installed. You should run this utility every few months or when notified by ezChartWriter Support Team of a new release.



Program Settings

The various options for program operation and user details can be set on the **Program Settings & Options – User Level** window:



General Settings

Date Format for Logbook Entries
Allows customization of the way a date is printed (for example, mm/dd/yyyy format). You may use one of the three predefined formats or create your own.

Date Format for Rx/Reports
Allows customization of the way a date is printed (for example, mm/dd/yyyy format). You may use one of the three predefined formats or create your own.

Enable/Disable file cabinet sounds
Set the default provider for Rx's/Reports as the currently logged user (default is checked recommended setting).

Auto-select HIPAA notification for each new patient
Automatically create a HIPAA notification entry for any new patients. This indicated the patient was provided a copy of the clinic's privacy protection practices.

Auto-select provider for reports/Rx's as currently logged user
Select the default report for use when the user clicks the **Print Record Release Form** on the Patient Demographics window (under the **HIPPA** tab). Default setting is the report "Record Release Request".

User Details

Allows the user to modify their own information, including ID numbers. The user security level is visible (but only modifiable by the System Administrator). The user can, however, change their username or password on this screen.

Set user as Default: On each computer (network or solo), the default username displayed at startup (on the LOGIN screen) is determined by this setting. The user who primarily uses this computer should check this box.

Folder Paths

Set default locations for the following folders:

Path to PDF documents: When saving a PDF version of a report or Rx, this is the default location when asked to save file.

Path to Patient Photos: If you are capturing patient photos to include in the Patient Demographics window, this is the default location.

Path to Database Backups: The default location where ezBackup stores backup images of your database.

Custom Lists

Throughout ezChartWriter, there are various lists and choices that can be customized. You may edit or add to these lists by performing one of the following:

- Selecting list to edit in the dropdown box at the top.
- Clicking on the item to edit, or alternatively, selecting the NEW button to add an item to the list.

Report Settings

Allows the default report for each Rx type to be selected, as well as setting a default title. The four main Rx categories are: Blank Rx, Medication Rx, Spectacle Rx and Contact Lens Rx.

Tool Settings

Allows customization of the Rx Tools in ezChartWriter. The available options include the following:

Diopter steps, (applies to spectacle and contact lens Rx's).

Mouse button: for fine adjustments on spectacle or contact Rx tools. Basically, this allows for the reversal of the effect of clicking on the right or left button. The default for fine movements is the left button (i.e. clicking with the left button increments or decrements the power by the default diopter step amount; the right button "jumps" to the clicked location.

Auto copy selected contact lens brand from right eye to left (default is true).

Save all new Rx's to LOGBOOK. Default is true; can be overridden when creating Rx with the Rx wizard.

Set default fonts for the Rx data being inserted into reports. This can be modified if your reports are exceeding a full page when Rx data is inserted.

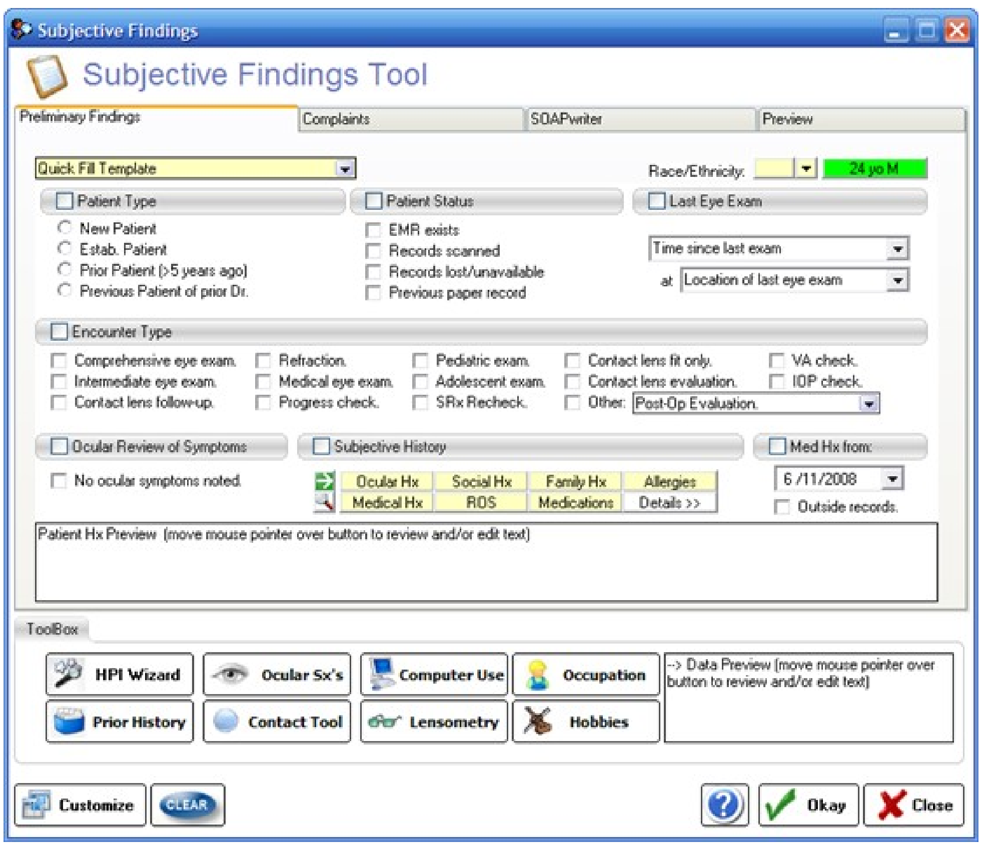
Default Rx Wizard Setup start-up Rx type. When the WIZARD starts, this is the Rx that is pre-selected.

Encounters

Overview

This section of the manual explains how to create and use the exam encounters for your patients. .

Subjective Findings Tool



The **Subjective Findings Tool** is probably one of the most difficult of the ezChartWriter tools to master, because it has both a large amount of options and is very powerful. From this tool, you can completely describe a patients subjective complaints, history of present illness, history, and medications/allergies. Nearly every conceivable symptom is accounted for; the hard part is learning where to look.

The SUBJECTIVE FINDINGS tool is split into a top half (Findings/Complaints & History) and a ToolBox at the bottom. The top section has itself four subsections: **Preliminary Findings**, **Complaints**, **SOAPwriter** and **Preview** mode.

PRELIMINARY FINDINGS TAB

This section allows you to set the basics of the patient's "reason for visit" and well as specifying ocular and medical history. The various parts of the PRELIMINARY FINDINGS section are listed below

QUICK FILL TEMPLATE - by selecting a template choice here, you can prefill many of the options on the SUBJECTIVE FINDINGS FORM. The templates available cover both new and established patient encounters.

DEMOGRAPHICS BUTTON & ETHNICITY DROPDOWN - if you wish to include the patient age or race, clicking the DEMOGRAPHICS button will calculate and display them.

PATIENT TYPE - Choose whether New, Established (with sub-types)

PATIENT STATUS - indicates whether you have prior paper or electronic records for the patient.

LAST EYE EXAM - if you selected established patient, this field auto-fills with the date of last exam (if electronic record exists), otherwise you can select the appropriate time frame from the dropdown list. You may also specify the location/provider of last exam.

ENCOUNTER TYPE - you may indicate the type of encounter. In conjunction with the PATIENT TYPE field, this auto-calculates the proper 92000 series CPT code. If you select "medical eye exam" however, you must choose the CPT code yourself when finalizing the encounter.

OCULAR REVIEW OF SYMPTOMS - much like the systemic review of systems, you can cover most of the patients spectrum of symptoms. The "No ocular symptoms noted" choice is auto-selected, but you can over-ride it by simply clicking the OCULAR SYMPTOMS button in the toolbox at the bottom of the SUBJECTIVE FINDINGS tool.

SUBJECTIVE HISTORY (aka PATIENT HISTORY) - this group of buttons allows you to fully specify the patients medical history. If the patient is "All Normal", simply click the green arrow and the buttons turn green (indicating normal). You can unselect a button by clicking on it individually. To set specific problems, click the DETAILS button. The QUICK HISTORY screen appears (covered in detail further below).

DATE OF MED HISTORY - if you are reviewing history from a prior exam, you can set the date here. Also, indicate if outside records where reviewed to determine patient history (for instance, in a nursing home environment).

COMPLAINTS TAB

Allows you to enter specific patient complaints (ranging from vision to medical related). Although at the current time the checkboxes are not customizable, you can easily edit you choices in either the PREVIEW tab or in the SOAPnote itself.

COMPLAINTS - General vision complaints, as well as some medical eye related complaints. Two sections are available, the CHIEF COMPLAINT at the top and an "ALSO REPORTING" section at the bottom portion of the tab.

SPECTACLES - Enter information regarding the patient's spectacle wearing status.

CONTACT LENSES - Enter details about the CL wear history (can be in addition to, or in place of, the CONTACT LENS tool from the TOOLBOX).

MISC COMPLAINTS - other complaints that do not fit easily into other categories.

SOAPWRITER TAB

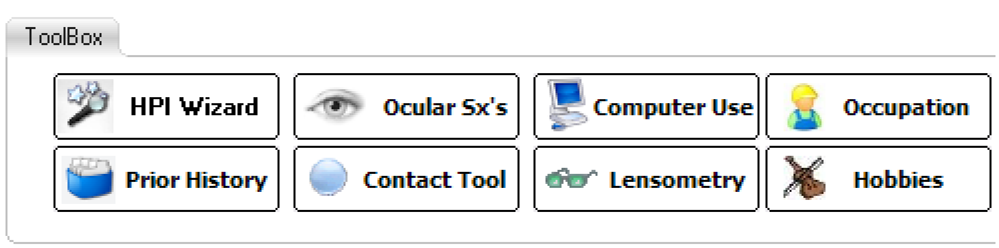
The SOAPwriter function is on of the most powerful in ezChartWriter. Located as subsections of most of the other tools also, and as a stand alone tool found in the left-side TOOLBOX on the MAIN EXAM SHEET, the SOAPwriter allows you to pick and choose from among hundereds of pre-formed text sentences. For instance, to indicate a patient has a symptom of asthenopia, you would click on the Symptoms heading, the choose Visual Symptoms, then choose "Asthenopia". The preview box pops up showing you exactly what will be pasted into the SOAP note. The sentences are designed to flow like natural language. And, if you don't like how a sentance reads, just change it in the PREVIEW box or in the SOAPnote itself. You can even customize the text with the SOAPwriter editing tool, so it reads the way you want for all your exams.

PREVIEW TAB

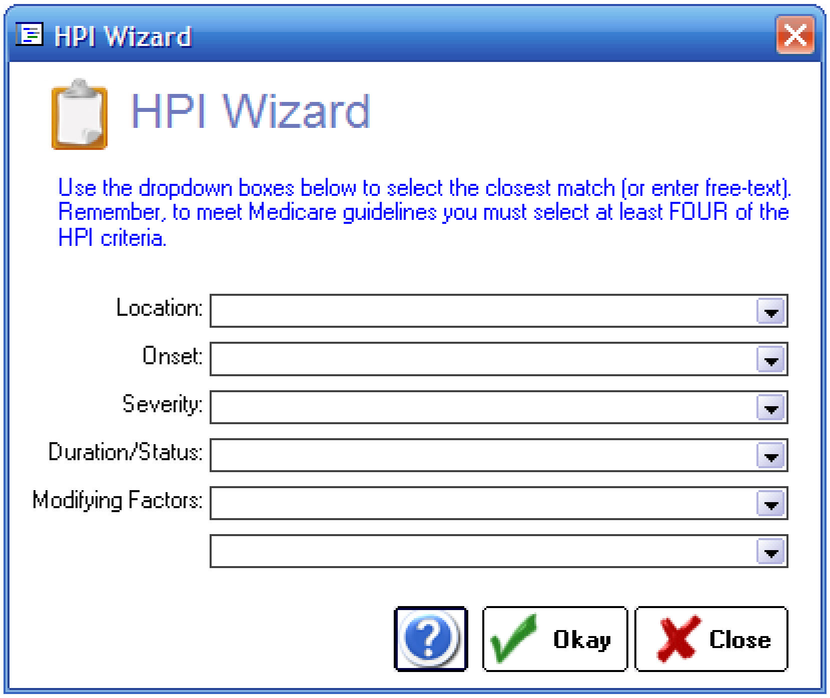
Whenever you click a checkbox or add a SOAPwriter text statement, they are available for preview in the PREVIEW box. The text in the PREVIEW box is totally editable: the changes you make here will appear exatly in the SOAPnote when you click the OKAY button on the SUBJECTIVE FINDINGS form.

SUBJECTIVE HISTORY TOOLBOX

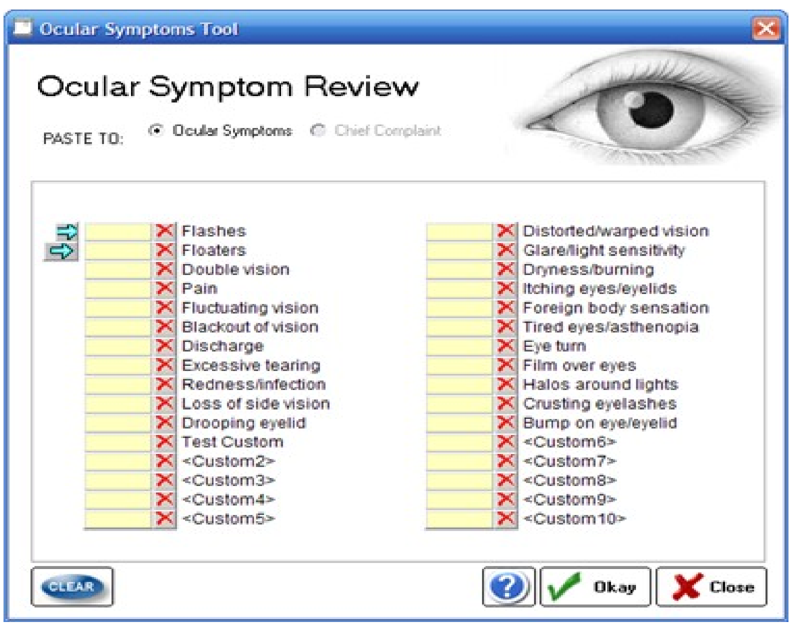
Located at the bottom of the SUBJECTIVE FINDINGS screen is the TOOLBOX. In it are eight buttons which allow you to specify more specific history and problems.



HPI WIZARD - You can specify the patients History of Present Illness (HPI), as required by Medicare coding guidelines), by using this tool. Remember that you must specify a minimum of FOUR (4) items to satisfy most coding levels. Standard choices include: Location, Onset, Severity, Duration and Modifying Factors. You can use the regular SUBJECTIVE HISTORY and/or SOAPWRITER tool to flesh out the history if desired.



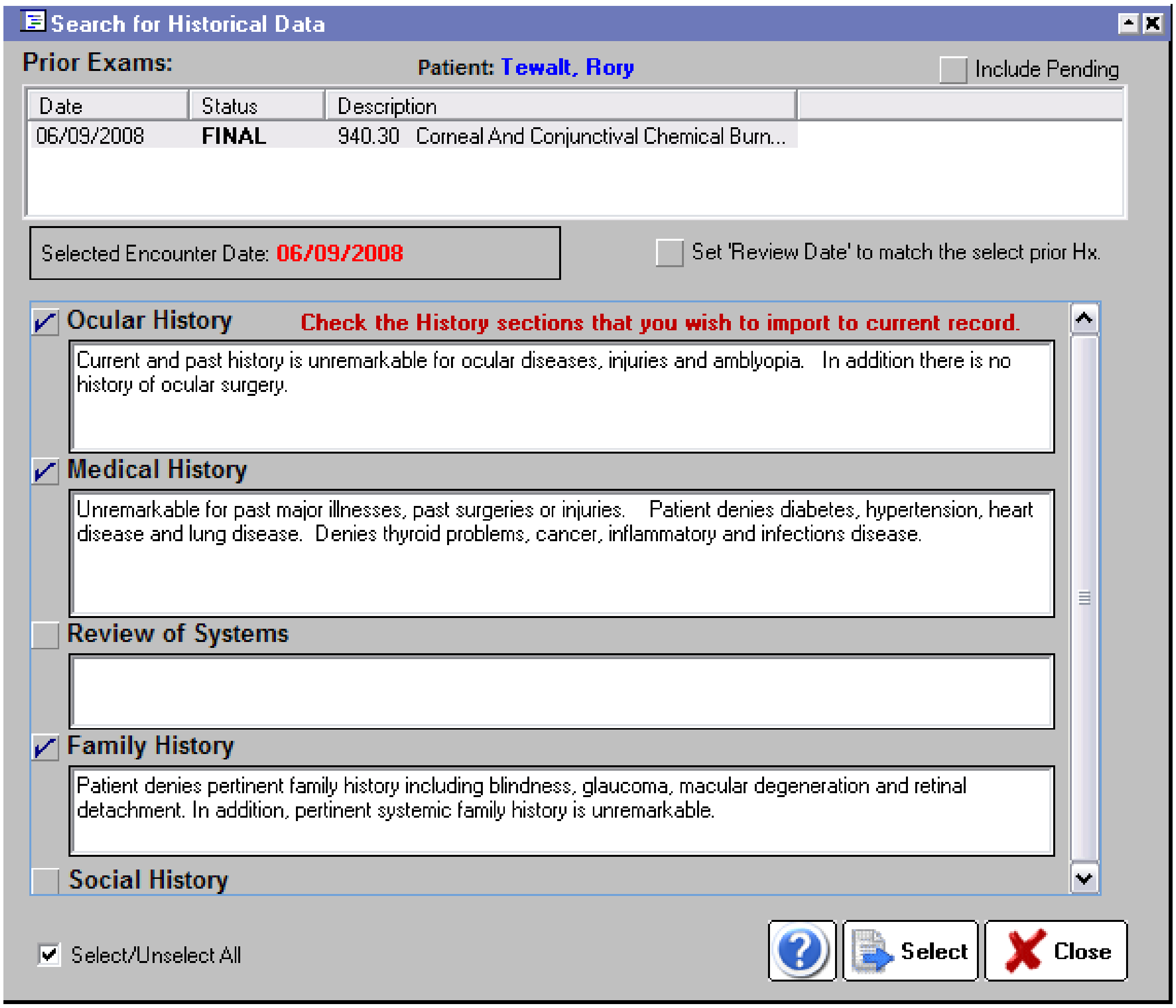
OCULAR SX's - As discussed above in the OCULAR REVIEW OF SYMPTOMS, this tool gives you the ability to fully document current and past symptoms. Like many of the other tools in ezChartWriter, the OCULAR SX's tool is completely customizable.



COMPUTER USE - Allows you to specify the patients typically computer usage.

OCCUPATION - You may specify the occupation(s) of the patient.

PRIOR HISTORY - Once you have seen the patient back for a repeat examination, you can call up prior subective history data and paste them into the record.



CONTACT LENS TOOL - A link to the contact lens tool (where you can list the patients habitual contact lenses and wear routine). This tool is also available from the MAIN CHART left-side TOOLBOX menu.

LENSOMETRY - Allows entry of lensometry results. You can also use the MAIN CHART left-side TOOLBOX menu choice AUTOMATED INSTRUMENT TOOL to enter lensometry results.

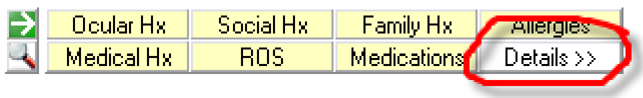
HOBBIES - You may specify any hobbies or avocations of the patient.

TEXT PREVIEW BOX - One of several preview boxes on the SUBJECTIVE FINDINGS tool, you can view the data to be inserted into the exam record by moving your mouse over the tool button. What you see is what will be inserted when you click the OKAY button.

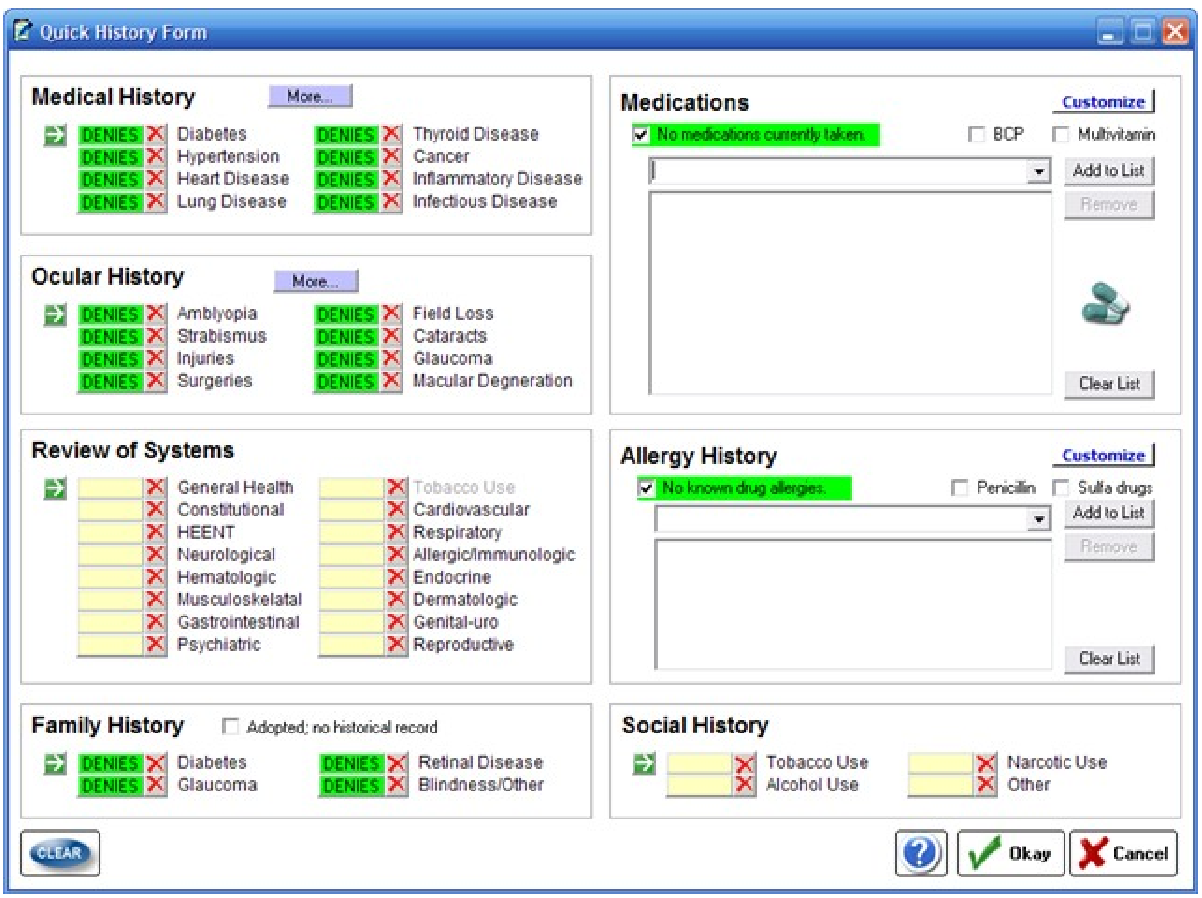
CUSTOMIZE - although not part of the actual TOOLBOX, the CUSTOMIZE button allows you to configure certain settings of the SUBJECTIVE FINDINGS tool to you own personal settings.

DETAILED HISTORY TOOL

The DETAILED HISTORY TOOL allows for complete entry of a patient's medical, ocular, social, family and medication/allergy history.

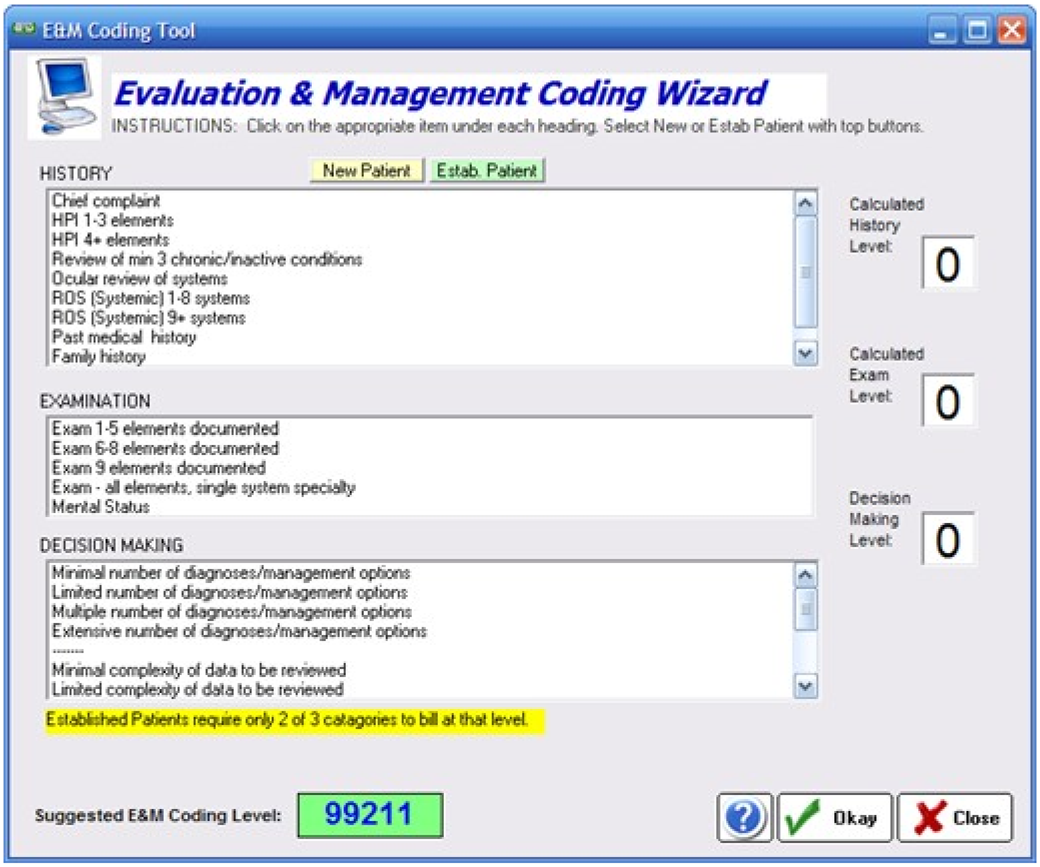


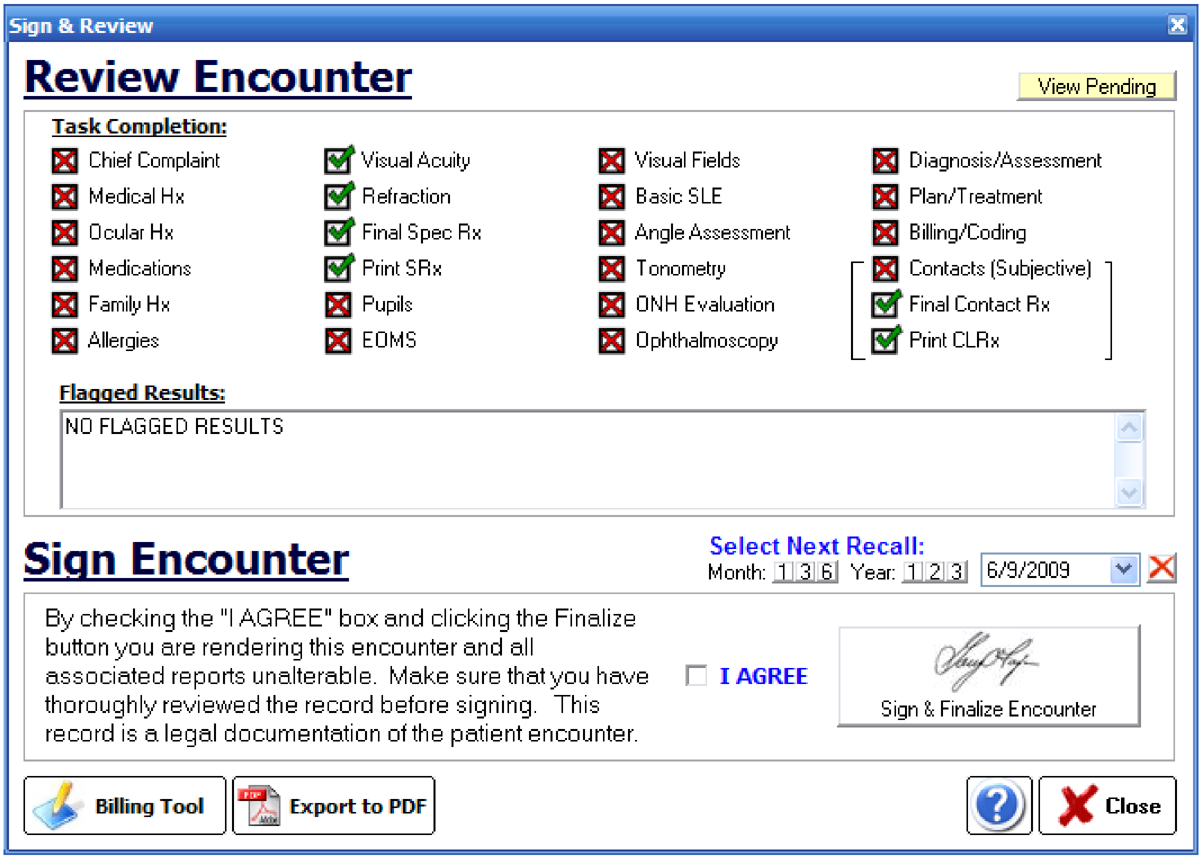
To begin using the tool, click the Green Arrow (which Quick Fills all “Normal” values). Then click the Details>> button. The screen show below is displayed:



SCREENSHOTS OF OTHER TOOLS

Below are some screenshots of the other Encounter Tools:




Sign & Review
Review Encounter
View Pending
Task Completion:
Chief Complaint
Medical Hx
Ocular Hx
Medications
Family Hx
Allergies
Visual Acuity
Refraction
Final Spec Rx
Print SRx
Pupils
EOMS
Visual Fields
Basic SLE
Angle Assessment
Tonometry
ONH Evaluation
Ophthalmoscopy
Diagnosis/Assessment
Plan/Treatment
Billing/Coding
Contacts (Subjective)
Final Contact Rx
Print CLRx
Flagged Results:
NO FLAGGED RESULTS
Sign Encounter
Select Next Recall:
Month: 1 3 6 Year: 1 2 3
6/9/2009
By checking the "I AGREE" box and clicking the Finalize button you are rendering this encounter and all associated reports unalterable. Make sure that you have thoroughly reviewed the record before signing. This record is a legal documentation of the patient encounter.
I AGREE
Sign & Finalize Encounter
Billing Tool
Export to PDF
Close

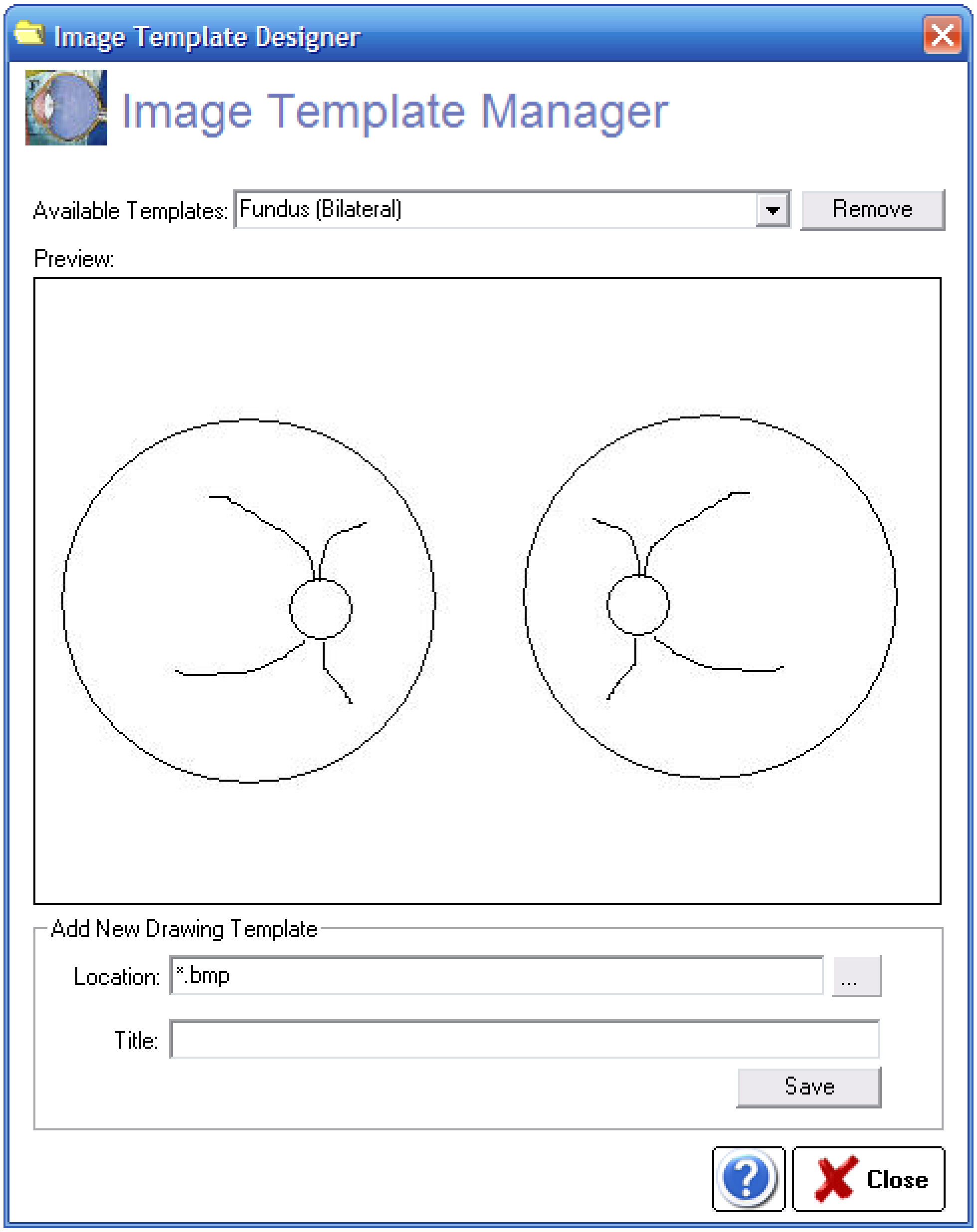
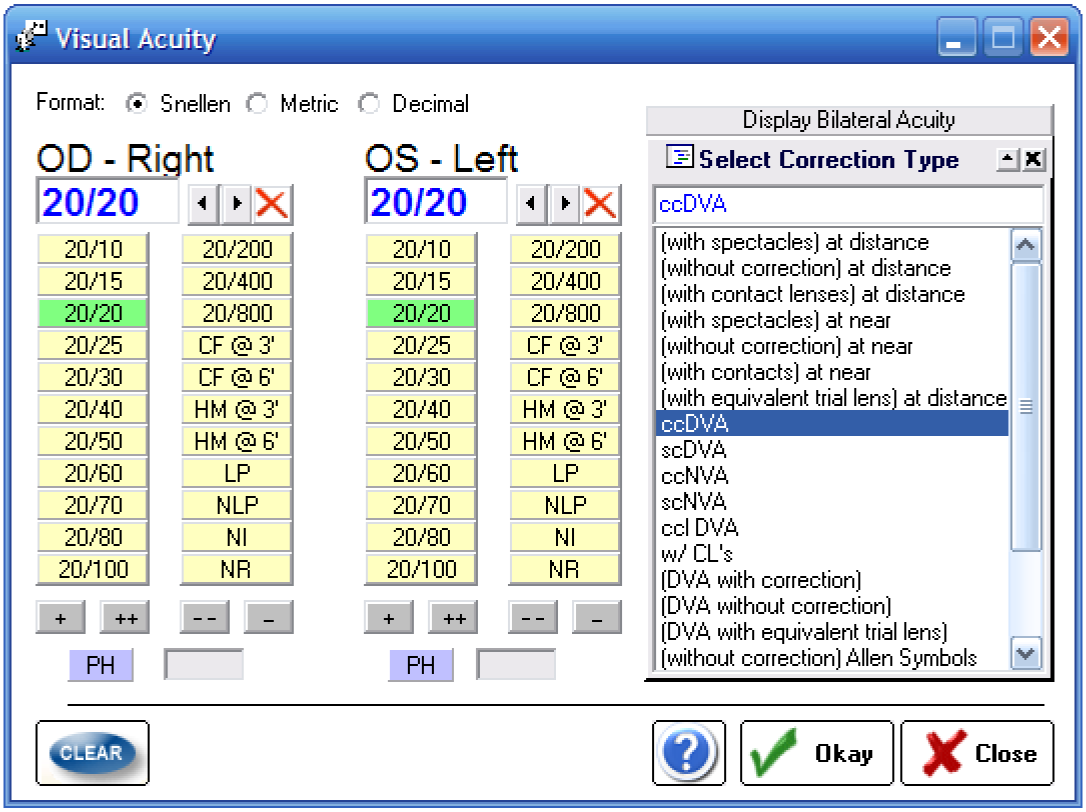
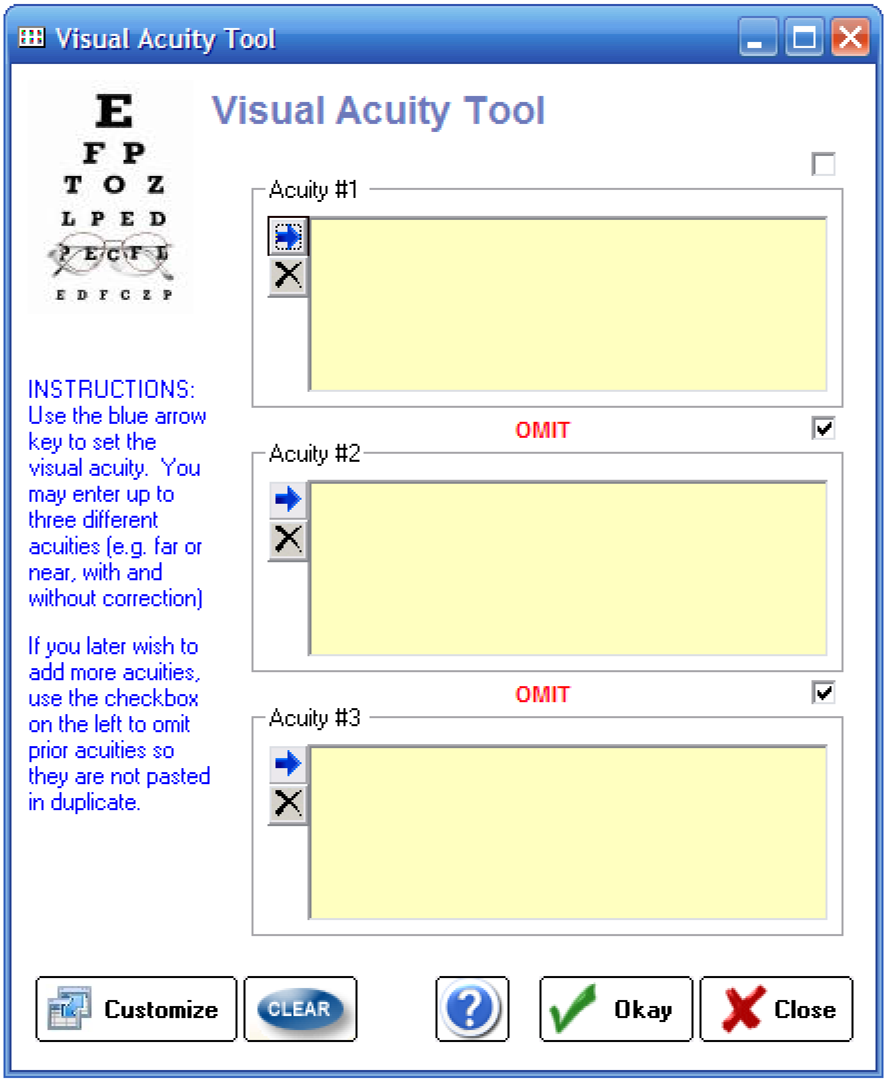
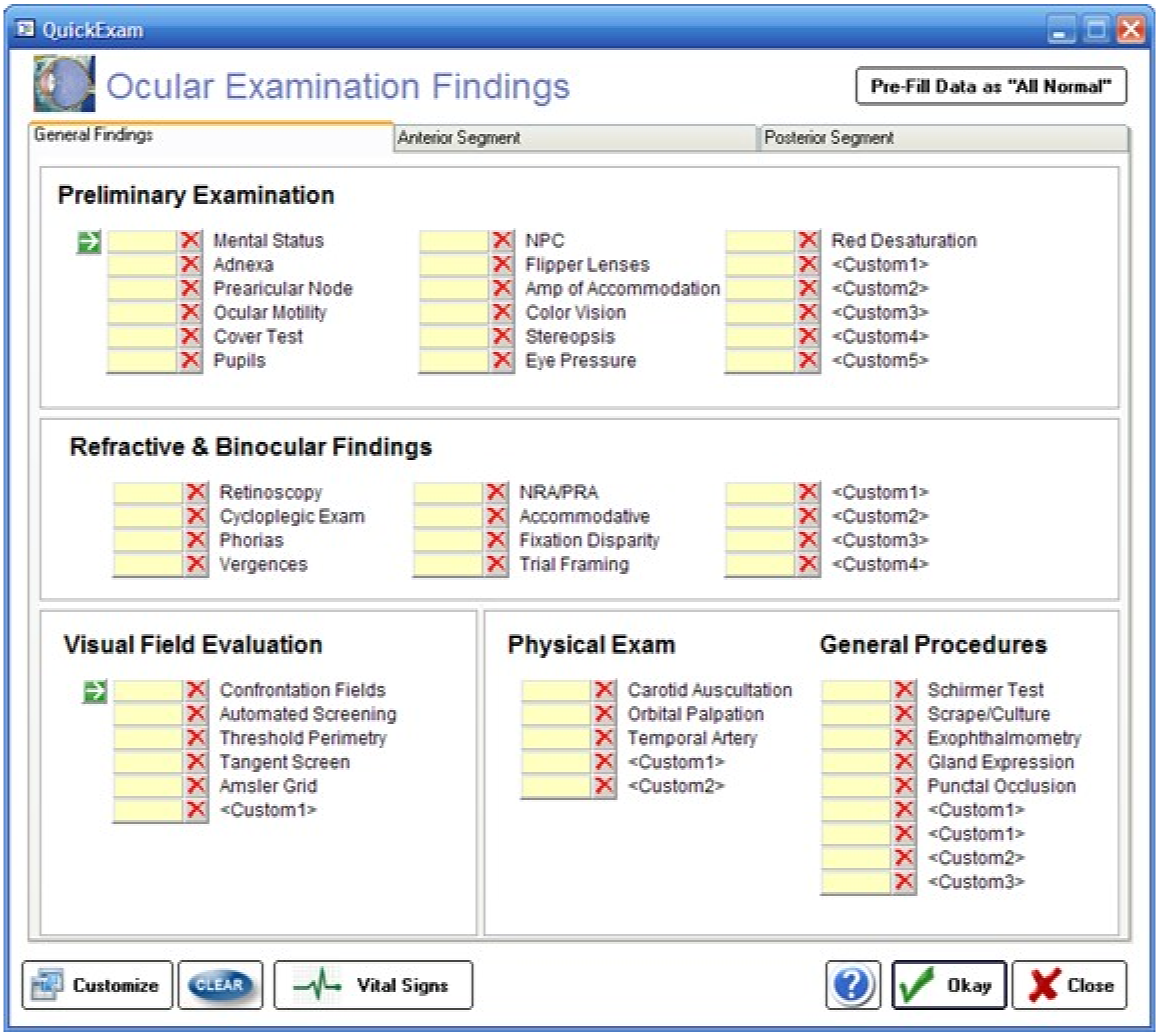


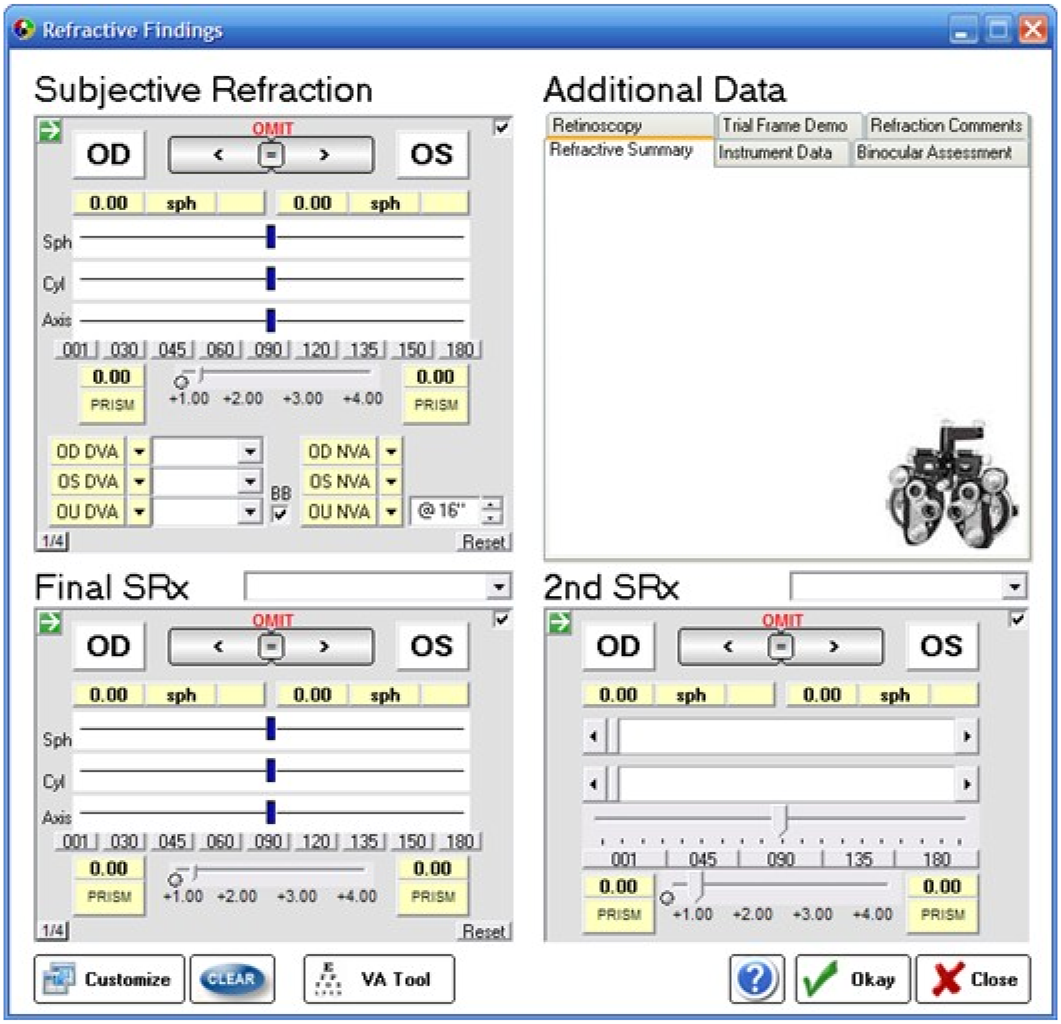
Image Template Designer
Image Template Manager
Available Templates:
Fundus (Bilateral)
Remove
Preview:
Add New Drawing Template
Location:
*.bmp
...
Title:
Save
Close



Visual Acuity
Format: Snellen Metric Decimal
OD - Right
20/20
OS - Left
20/20
Display Bilateral Acuity
Select Correction Type
ccDVA
20/10
20/15
20/20
20/25
20/30
20/40
20/50
20/60
20/70
20/80
20/100
20/200
20/400
20/800
CF @ 3'
CF @ 6'
HM @ 3'
HM @ 6'
LP
NLP
NI
NR
+
++
- -
-
PH
(with spectacles) at distance
(without correction) at distance
(with contact lenses) at distance
(with spectacles) at near
(without correction) at near
(with contacts) at near
(with equivalent trial lens) at distance
ccDVA
scDVA
ccNVA
scNVA
ccl DVA
w/ CL's
(DVA with correction)
(DVA without correction)
(DVA with equivalent trial lens)
(without correction) Allen Symbols
CLEAR
Okay
Close


Visual Acuity Tool
Visual Acuity Tool
INSTRUCTIONS: Use the blue arrow key to set the visual acuity. You may enter up to three different acuities (e.g. far or near, with and without correction)
If you later wish to add more acuities, use the checkbox on the left to omit prior acuities so they are not pasted in duplicate.
Acuity #1
OMIT
Acuity #2
OMIT
Acuity #3
Customize
CLEAR
Okay
Close


QuickExam
Ocular Examination Findings
Pre-Fill Data as "All Normal"
General Findings
Anterior Segment
Posterior Segment
Preliminary Examination
Mental Status
Adnexa
Prearicular Node
Ocular Motility
Cover Test
Pupils
NPC
Flipper Lenses
Amp of Accommodation
Color Vision
Stereopsis
Eye Pressure
Red Desaturation
<Custom1>
<Custom2>
<Custom3>
<Custom4>
<Custom5>
Refractive & Binocular Findings
Retinoscopy
Cycloplegic Exam
Phorias
Vergences
NRA/PRA
Accommodative
Fixation Disparity
Trial Framing
<Custom1>
<Custom2>
<Custom3>
<Custom4>
Visual Field Evaluation
Confrontation Fields
Automated Screening
Threshold Perimetry
Tangent Screen
Amsler Grid
<Custom1>
Physical Exam
Carotid Auscultation
Orbital Palpation
Temporal Artery
<Custom1>
<Custom2>
General Procedures
Schirmer Test
Scrape/Culture
Exophthalmometry
Gland Expression
Punctal Occlusion
<Custom1>
<Custom1>
<Custom2>
<Custom3>
Customize
CLEAR
Vital Signs
Okay
Close


Refractive Findings
Subjective Refraction
Additional Data
Retinoscopy
Trial Frame Demo
Refraction Comments
Refractive Summary
Instrument Data
Binocular Assessment
OD
OMIT
OS
0.00 sph
0.00 sph
Sph
Cyl
Axis
001 030 045 060 090 120 135 150 180
0.00 PRISM
+1.00 +2.00 +3.00 +4.00
OD DVA
OS DVA
OU DVA
BB
OD NVA
OS NVA
OU NVA
@ 16"
1/4
Reset
Final SRx
2nd SRx
Customize
CLEAR
VA Tool
Okay
Close

Report Writer

Overview

This section of the manual explains how to use various commands to make your reports more legible and attractive.

Basic Text Editing

Navigating the report

You may already be familiar with functions of the standard cursor keys for finding your way around reports, particularly if they extend over more than a single screen. These commands are similar to those used by many word processors, particularly Microsoft Word.

Highlighting text

Wherever in the **Reports** window you happen to be working is where the *focus* is. Selecting an item means to highlight it to let you know it has been selected.

Insert and overtype modes

Just as in other word processors, whether you insert text or overwrite existing text depends on whether you are in Insert or Overtype mode, as displayed on the Status bar at the bottom of Report Writer main window.

Replacing text

When you need to replace text, simply highlight the part to be replaced, then immediately type the replacement text without needing to press **Delete**.

Deleting text

Press the **Delete** key to delete a selected block of text, or use the **Delete** or **Backspace** keys to delete one character at a time.

Undo and Redo

Pressing **Ctrl+Z** immediately you change your mind or realize you made an error will undo most report edits including formatting changes, so should always be tried before other methods. Press **Ctrl+Y** to redo the changes. The Report Writer remembers all your edits from the moment you selected the current node (enabling you to press Ctrl+Z successively to backtrack through your edits), but forgets them all as soon as you close the report.

It's time to learn how to copy and move text.

Copying and Moving Text

Having selected (highlighted) the block of text, you have the choice of using the keyboard or mouse to accomplish these aims.

Drag-and-Drop Using the Mouse

Dragging the selected text block and dropping it at its new location is a quick and easy way to move text from one location to another within the same report. You can also use this to break up an report into smaller chunks by dragging and dropping each section where you wish it to be located. You can also copy text from documents in compatible applications such as Microsoft Word to the currently open report.

Cut/Copy/Paste using the keyboard

Having highlighted the block, press **Ctrl+X** to cut it or **Ctrl+C** to copy it, then **Ctrl+V** to paste it within the same or a different report, all using the Windows Clipboard. The target may be in the same report file, another report file that you open, or an open document in a compatible application such as a word processor. Although dragging and dropping is very easy to do, this method offers several advantages:

Using the keyboard to select text may feel more precise;
Text once copied to the Windows Clipboard can be pasted into multiple locations, whereas the entire drag-and-drop must be repeated.

Now that you can perform the basics, let's see what a little formatting can achieve.

Formatting Text

Although you can use the same font face, size and color throughout the report, text is much more attractive when headings are more prominent, subparagraphs are indented, etc.

Plain Text and Rich Text

You can add text colors, font faces, sizes and styles such as boldface, and the report is regarded as being in Rich Text Format (RTF). RTF reports can be converted to plain text easily, if desired:

Examples:

This paragraph uses Plain Text alone. All text is the same font face, style, size and color. Boldfacing, italics, underlining, etc. are not used; changing from lower case to UPPER CASE is the only way to make text more prominent.

This paragraph uses ***Rich Text***, which allows many more formatting attributes such as **color** to be incorporated. Adding color and images automatically changes the format from plain text to rich text, since both hide extra code in the report.

Report Writer regards its reports as being in rich text format, but you can mix these within a file. Who would want to use plain text when rich text has so much more to offer? Here are two good reasons:

Plain text reports make the ezChartWriter database much smaller, since there are no hidden formatting characters. This can make quite a difference when you have thousands of reports.
You are not faced with the extra chore of reformatting to match the format of the rest of the report text if you copy and paste in plain text.

Note also that plain text reports cannot contain images, underlined hyperlinks, tables, boldfaced or other types of formatting. Converting a rich text report to plain text removes images and table cell borders but leaves the text itself.

Basic formatting commands

Let's concentrate now on rich text. You will find the most frequently used commands (bold, italic, underline, case conversion, font face/size/color/highlight color, etc.) displayed along the **Report formatting** toolbar. Let your mouse cursor hover over each toolbutton in turn to display a tooltip (text popup message) informing you of its function and keyboard shortcut, if there is one. Try them out.

Now let's shape our text a little more by aligning and indenting it.

Aligning and Indenting Text

Report Writer offers several methods for indenting and aligning text. Toolbuttons for many of them are on the **Paragraph** toolbar.

Alignment and justification

Click the Left, Right, Justify or Center toolbuttons (or press their corresponding shortcut keys) for text aligned with the left or right margins, both margins or center of the report.

Tab key and Auto Indent

Press the **Tab** key one or more times to indent the text an appropriate distance from the left margin. This is best used for short single lines, since tabbing and auto-indenting only affect the first line of a paragraph.

Bulleted and numbered paragraphs

Text which is bulleted and numbered is automatically indented. Round bullet symbols, numbers and letters are available. Toolbuttons for this are on the Paragraph toolbar.

Enclosing text in table cells

Just as in HTML pages, you can compartmentalize text in individual cells of tables for greater control when combining text and images. These advanced methods are discussed in Tables.

Time to look at inserting items into your text.

Inserting Items into Your Text

The Insert menu

Frequently-reused text (also known as "boilerplate" text) can be copied to the Windows Clipboard (see Copying and moving text), then pasted in where needed.

Tables

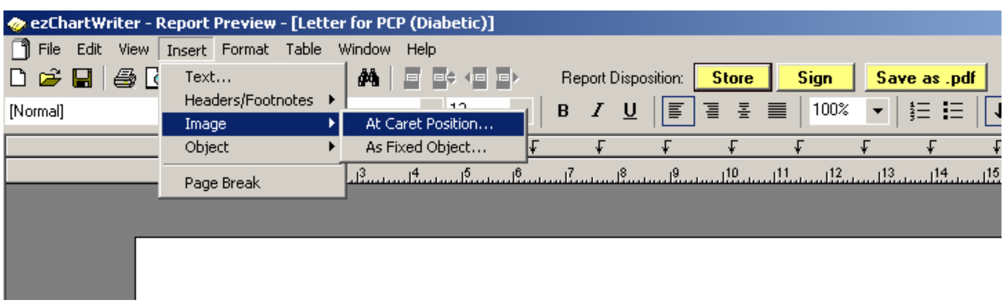
To insert a table where required, click Main menu / Table / Insert command. See Tables.

Using images

Since images may occasionally be required, ezChartWriter allows you to display images alongside text. This feature helps you create anything from simple reports to complex forms.

To Insert Images

Inserting images is very easy. You can do this by cutting and pasting them from the Windows clipboard, although we recommend that you use the **Insert command** to select the appropriate image(s) from image files already stored on your computer.



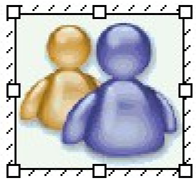
Find an image you would like to insert into your report and note its location in Windows Explorer.

Right-click in the report where you would like to insert the image and click ***Insert / At Caret Postion*** to open the **Insert image into report** window.

Navigate to the folder containing the image, click it to select it and then click **Open** to insert it at the current cursor position.

To Delete Images

To delete the image, click it (a border with small square "handles" will appear around it - see below) and press **Delete**. To undo this step, press **Ctrl+Z**.



This shows the border and handles that become visible on single-clicking an image. Reposition the image by dragging it when the border is visible, or re-size it by dragging one of its handles.

Copying, Cutting, Pasting Images

You can copy an image from one report to another, or even from a compatible document such as a Microsoft Word document, via the Windows Clipboard, simply by pressing **Ctrl+C** , **Ctrl+X** , or **Ctrl+V** to **Cut**, **Copy** or **Paste** the image respectively.

Moving, Positioning, and Resizing Images

Images can be **moved** and **repositioned** by dragging them, inserting spaces, tabs or text between them and the left margin, by indenting the left margin, or by enclosing the image in a table cell. **Resizing** can be done by dragging the handles, but it is better to do this only to get a rough idea of their ideal size, then use an image editing program to resize them accurately while maintaining their proportion and re-import them.

Tables

Overview

Using the Tables toolbar you can create and edit tables. You can also combine and split cells, color cells, color the table, set the table border-width and color, delete and insert table rows and columns.

Working with Tables

To Create a Table in Report Writer

Click ***Main menu / Table / Insert table***. A dialog box will appear allowing you to choose:
the number of **columns**
the number of **rows**

This table has 3 rows, 2 columns, center alignment and a border:

Row 1 Col 1 Row 2 Col 1	Row1 Col 2 Row2 Col 2
Row 2 Col 1	Row3 Col 2

The best way to learn about tables is to create tables in various configurations within a test report.

To Alter a Table

Click inside a table in the report, then activate ***Main menu / Table*** . There are several menu choices, enabling you to alter the following table parameters.

Other methods of altering tables

- Editing text in tables
- Adjusting column width and position
- Moving a column or row
- Inserting and deleting rows and columns
- Splitting and combining cells

The proportional width of a table (as a percentage of the report width) can be altered by using the table properties dialog or by dragging the table-handles in the horizontal report ruler.

You can adjust the width of each column by dragging the dividing partition left or right.

To enter text within a table, position the report cursor in the appropriate cell and begin typing.

If you make a mistake in table creation, deletion or typing, you can generally undo your actions by pressing **Ctrl+Z** or clicking the **Undo** toolbutton.

To delete a table, position the report cursor anywhere within it and click ***Main menu / Table / Delete***. You will be asked to confirm your action. You can also delete a table without confirmation by inserting a blank line above and below if not already present, highlighting the whole table, including the two blank lines, and pressing **Del**. Highlighting just the table and pressing **Del** removes all text within the table but not the table itself. As mentioned above, you can restore a deleted table by pressing **Ctrl+Z** or clicking the **Undo** toolbutton.

You cannot easily move, copy , or swap whole columns or rows within a table; you must move each cell individually. For this reason you should design the layout of your table carefully before creating it.

Currently, you cannot create a table within a table.

Editing Text in Tables

Here are some more hints and tips about doing this.

As mentioned previously, text (or images) in one or more cells, rows or columns can be individually aligned (left | right | center) by highlighting it then choosing one of the alignment toolbuttons on the Paragraph toolbar (or via the Edit menu or a keyboard shortcut). Centering text and right-justifying dollars and cents can be very effective.

If you choose left or right alignment, the text will be hard up against the wall of the table, as cell padding is not provided. One workaround is to create extra hidden columns to act as margins.
For example:

	Text hard up against left margin

		Add a dummy column

	Then hide its border

To hide the border, click anywhere in the cell with text, then click the Show left border toolbutton on the Table toolbar to disable it. This will be discussed more fully later. You can drag the Table toolbar off the Toolbars area, making it "float" closer to where you are working.

You can treat text in tables as you would anywhere else in an report. You can cut, copy and paste it.

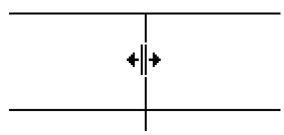
You can select (highlight) a whole row or column by performing one of the following actions:

- Click-dragging the mouse cursor over it; or
- Combining the **Shift** key with the **cursor** (arrow) keys to select multiple cells just like increasing the size of a highlighted section of text; or
- Clicking in one cell and selecting the ***Select table row*** or ***Select table column*** command from ***Main menu / Table***, or choosing the appropriate **Table toolbar** toolbutton.

Having highlighted these cells you can apply boldface, italics or color changes to the text or background.

Adjusting Column Width and Position

You can adjust the width and position of any column by dragging the internal vertical partitions left or right. When your mouse cursor passes over a partition, the cursor will change to a pair of vertical bars with arrows:



You cannot drag the horizontal partitions up or down, but you can add extra spaces to the entries in a row, or add a blank row or column.

You may need to adjust the partitions after deleting a column.

Navigating Within a Table

Think of a table as being a block of text that happens to contain vertical and horizontal lines. Use the **Tab** and arrow cursor keys if you don't want to keep reaching for the mouse all the time. To jump from cell to cell, left to right along a row and top to bottom, press the **Tab** key. To go in the reverse direction, press **Shift+Tab**.

The Right arrow key follows the same direction as the Tab key but stops at each character. Similarly, the Left arrow key follows the Shift+Tab key. The Up and Down arrow keys move up and down columns. Note that if you start from outside a table, the Down arrow key will move down the leftmost column and the Up arrow key will move up the rightmost column.

Moving Text, Columns, and Tables

To Move and Copy Text from Cell to Cell

The destination cell need not be an adjacent cell. You can move text anywhere within the table.

Alternatively, you can copy or cut a highlighted block to the Windows Clipboard and paste it in. This can be handy if you need to paste the same text into several cells.

1. Highlight the entire contents of a cell using the cursor keys or the mouse
2. Drag the highlighted block to the destination cell.

NOTE: If the destination cell is not empty you can use this method to insert the block into existing text.

To Move a Column or Row

You can only move one cell at a time using the method described in Moving and copying text from cell to cell; you cannot move a whole column or row. For this reason, you should plan your layout carefully before creating the table. However, you can achieve the same end by inserting a new row or column in the destination position, dragging the contents of each cell in the original row or column across to it, then deleting the original.

You can also copy one or more highlighted rows and paste them as separate tables, rearrange them vertically to form a new sequence and then join them. See Moving and copying tables.

To Move and Copy Tables

Whole tables, including contents, can be cut, copied and pasted, just like any other blocks of highlighted text, to and from the Windows Clipboard. They cannot be dragged. You can also copy one or more highlighted rows and paste them elsewhere (outside the table) as a separate table. However, pasting them back only replaces existing text corresponding to the number of rows you pasted in. Instead, create the same number of extra rows, then fill them with inserted text. The following example shows you how:

Example: Insert Table 2 into table 1.

aaaaa   Table 1
ddddd

bbbbb   Table 2
ccccc

Position the report cursor in the top row (aaaaa) of Table 1, then click the ***Insert table row*** toolbutton twice, to insert two rows.

aaaaa   Table 1
ddddd

bbbbb   Table 2
ccccc

Now, position the report cursor in the top row (bbbbb) of Table 2, and press **Shift+Down** to highlight both of its rows. Press **Ctrl+C** to copy them, then position the cursor on the top blank row in Table 1 and press **Ctrl+V** to paste the text contents.

aaaaa   Table 1 bbbbb   Table 2 ccccc
ddddd

bbbbb   Table 2
ccccc

Finally, delete Table 2 and tidy up. Done!

aaaaa   Table 1 bbbbb ccccc
ddddd

Inserting and Deleting Rows and Columns

To Insert a Row or Column

New rows are added below the selected row. New columns are added to the right of the selected column.

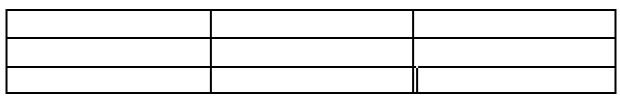
To add a row, select the existing row below which you want the new row to appear. by clicking in it.

Then:

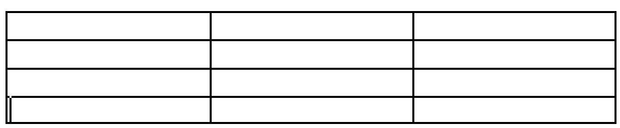
Click the **Insert table row** icon; or

Click ***Main menu / Table / Insert table row***; or

Press the **Tab** key after positioning the cursor in the rightmost cell of the selected row. This will insert a new table row and move the focus to the first cell of the new row. E.g. (the graphics below are images, not tables):



Before



After

Successive clicking will add more blank rows.

To Delete a Row or Column

If you have just inserted one (blank) row or column too many, you can reverse this by clicking **Undo** (**Ctrl+Z**).

Alternatively, to delete a row or column, select it and click the **Delete table row** toolbutton.

If you need to remove a block of consecutive rows within a table, start at the top row to be deleted and keep clicking the **Delete table row** toolbutton until the deletion is completed.

Splitting and Combining Cells

To Horizontal Split and Combine Cells

Splitting and combining cells

You can **split** a cell into two horizontally by adding a partition, or remove it to **combine** two cells into one. Use the ***Split table cell*** and ***Combine table cells*** commands in ***Main menu / Table*** or corresponding **Table toolbar** toolbuttons.

Here is a table, originally 3 rows and 2 columns, which has had **split** and **combine** operations carried out on the second and third rows respectively.

Cell 1	Cell 2	Cell 3
Cells 1 and 2 combined		

Splitting columns

To split a column of blank cells into two: highlight the whole column then click the **Split table cell** toolbutton.

To Vertical Split and Combine Cells

Vertical splitting relies on showing/hiding the top and bottom borders of adjacent cells.

Let's start with a 4-cell table:

Cell 1	Cell 2
Cell 3	Cell 4

Figure 1

Think of each cell as having four borders, like this:

Cell 1	Cell 2
Cell 3	Cell 4

Figure 2

To avoid grid thickening, either the upper cell's floor or the lower cell's ceiling may be visible, but not both. (Occasionally you may notice a double thickness grid wall but this will disappear when you return to the report after moving to another node or closing the file, so is an artefact.)

Cell 1 floor visible	Cell 2
Cell 3 ceiling hidden	Cell 4

Figure 3

Cell 1 floor hidden	Cell 2
Cell 3 ceiling visible	Cell 4

Figure 4

Cell 1 floor hidden Cell 3 ceiling hidden	Cell 2
	Cell 4

Figure 5

Note the misalignment in the floors of Cells 1 and 2 in Figure 3 compared with Figure 4, due to different show/hide selections. If you notice this when creating your own tables, ensure that these parameters match across the whole row.

We have thus "combined" cells 1 and 3, so let's add some blank lines and rename the combination Cell 5:

Cell 5	Cell 2
	Cell 4

Vertical splitting is essentially the reverse of this.

Selecting Rows and Columns

By clicking any cell and then choosing from ***Select table row*** or ***Select table column*** in the Table menu or the Table toolbar, you can select the whole row or column that includes that cell.

This command is useful if you wish to change the font attributes, colors, etc. of all cells in the row or column, or to clear the contents of the row or column. You cannot use it to copy, move, swap or delete a row or column.

You can also select a whole column, row or block of cells by click-dragging the mouse pointer or by using **Shift+cursor** keys. See Editing text in tables.

To Select an Entire Table

Clicking anywhere in a table and selecting **Main menu / Table / Select** entire table will immediately select the whole table, which can be very convenient if you wish to change the same property for all cells or to hide/unhide cell borders for the whole table.

Table and Cell Borders

The right-most eight toolbuttons of the Table toolbar determine whether the borders of the cells selected are visible or hidden. Click any cell and see which of these border toolbuttons are depressed. Clicking any of them again reverses their effect.

Fig. 1: Original

Cell 1	Cell 2
Cell 3	Cell 4

This is the original table.

Fig.2: **Hide borders**

Cell 1	Cell 2
Cell 3	Cell 4

This can be reversed by clicking **Show borders**[1].

Fig.3: **Show outer border(s)**

Cell 1	Cell 2
Cell 3	Cell 4

This can can be reversed by clicking **Show inner border(s)**

Fig.4: **Hide borders** then **Show inner border(s)**

Cell 1	Cell 2
Cell 3	Cell 4

This can be reversed by clicking **Show borders**.

Fig.5: **Show left border** and **Show right border** disabled in all cells

Cell 1	Cell 2
Cell 3	Cell 4

Fig.6: **Show top border** enabled in lower cells and **Show bottom border** enabled in upper cells.

Cell 1	Cell 2
Cell 3	Cell 4

Combining these borders results in a thicker line which makes a convenient divider.

Fig.7: **Show top border** disabled in lower cells and **Show bottom border** disabled in upper cells.

Cell 1	Cell 2
Cell 3	Cell 4

Fig.8: **Show right border** enabled in Cell 1 and **Show left border** enabled in Cell 2. **Show right border** disabled in Cell 1 and **Show left border** enabled in Cell 4.

Cell 1	Cell 2
Cell 3	Cell 4

Cells 3 and 4 display the standard configuration as seen in Fig. 1. You would expect that adding Cell 1's right border would cause a thicker partition, but its only effect is to stagger the existing one towards Cell 1. The only remedy is to disable Cell 1's right border.

If you highlight a block of text and accidentally click any of the Show ... border toolbuttons your paragraph will display a horizontal or vertical line along one of its borders like part of a table. Doing this deliberately is not recommended as such stray table cell wall lines may cause interference with text and prove difficult to remove.

Table and Cell Color

Report Writer gives you full control over table and cell colors. With the **table properties** screens you can set the global table color or individual cell colors, as well as the table border-color and border-width.

Table Hints and Tips

To Insert Images into Tables

Tables are a good way to store images, which can be inserted using the ***Main menu / Insert / Image at Caret Position*** command. Just like web-pages which owe their neatness to tables with hidden borders, you can hide the table borders once you have finished inserting images. If you wish to display the table frame (also referred to as a grid), you can space the image away from the cell wall by adding a blank line above (press **Enter**), or by adding spaces.

Additional Information

Acknowledgements

Many thanks to all ezChartWriter users who sent in their excellent suggestions. Many of these already have been incorporated in this program, and many more will be implemented in future versions.

Support and Feedback

Our support department can be contacted by e-mail via
www.ezChartWriter.com/support.htm

New ezChartWriter news and product releases are viewable via
www.ezChartWriter.com

Appendix A

Technical Support

To contact technical support or obtain assistance with software problems:

1. Make sure that your question or problem is not addressed elsewhere in the manual or in the on-line Knowledge Base & FAQ section.

2. Send technical support questions to: support@ezChartWriter.com (we generally reply within 24-48 hours)

For more in-depth training with ezChartWriter, use the video tutorials available on the ezChartWriter CD (or on your local hard-drive, if you downloaded them). Each video tutorial walks you through a specific process, such as setup, adding patients, entering day-to-day transactions, opening new encounters, and other common tasks for a typical practice.

To look at the manual in the Main Login window, choose the **User Manuals** button or press F1 at any time. You may also choose to view the manual online for the most up-to-date information.

Website: www.ezChartWriter.com

Appendix B

Software Error Report Form

Name/Clinic: ______________________________

When you submit your bug report, it will be used to isolate and fix the problem. Obviously, the bug must be reproducible to be found. Make sure to list the exact steps to reproduce the failure. Future versions of the software will incorporate fixes as necessary.

(1) Please be as specific as possible when describing the problem.

(2) What version of the software are you using (located on the "About" box)?

(3) What operating system are you using?

(4) Please provide a brief description of the problem:

(5) If the problem is reproducible, please list the steps required to cause it, leaving a blank line between steps: (***example***: "1. Create a new file. 2. Insert some text ...")

(6) Please provide any additional circumstances in which it occurred and the symptoms observed: (***note***: it is much harder to fix non-reproducible bugs)

(7) If the problem causes any error messages to appear, please write down the exact text displayed and enter it here:

Fax report to (800) 497-3587

Appendix C

ezChartWriter Software License Agreement

This ezChartWriter Software End-User License Agreement ("EULA") is a legal agreement for the ezChartWriter Software Product in which this EULA is contained, which includes computer software and may include associated media, printed materials, and "online" or electronic documentation (collectively the "Software Product"), between you and ezChartWriter Software. ("ezChartWriter Software"). By installing, copying, or otherwise using the Software Product, you agree to be bound by the terms of this EULA. You must indicate your agreement to be bound by the terms of this EULA by pressing the "I ACCEPT" button on the Software Product's installation program, or else you will not be able to install the Software Product. If you do not agree to the terms of this EULA, you may not install or use the Software Product; you may, however, within 30 days of your initial purchase of a copy of the Software Product, return the entire copy of the Software Product (including all computer media, packaging and documentation) either to ezChartWriter Software's Customer Service department or to the retailer from which you purchased the Software Product, for a refund of the amount indicated by your sales receipt for the Software Product, in which event your rights under this EULA are immediately terminated. If you are installing the Software Product on a computer that is not owned by you, you are bound to the terms of this EULA both in your individual capacity and as an agent of the owner of the computer, and your actions will bind the owner of the computer. You represent and warrant to ezChartWriter Software that you have the capacity and authority to enter into this Agreement on your own behalf as well as on behalf of the owner of the computer the Software Product is being installed upon. For purposes of this EULA, the "owner" of a computer is the individual or entity that has legal title to the computer or that has the possessory interest in the computer if it is leased or loaned by the actual title owner.

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