

User Guide June 1, 2008

This manual covers ezChartWriter Version 3.0

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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 $\stackrel{\textcircled{}}{\oplus}$ 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 Alternative.

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 "<u>greyed-out.</u>" 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: <u>www.ezChartWriter.com</u> Email: <u>support@ezChartWriter.com</u>

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ezChartWriter on the Internet

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

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 <u>register</u> 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.

Registration Options	
I would like to evaluate the software before purchasing	
 Five (5) day trial period, totally anonymous Thirty (30) day trial; requires filling out a short survey form * 	spam
Already purchased a software license? O No	
Activate Now via Internet Import License File www.ezchartwriter.com	

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



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 1/2")

- 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.

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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: Supplies:	ezChartWriter \$129 (single license) Annual supplies = 2ϕ 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:

🖽 Network Wizard 🔀
Welcome to ezChartWriter! Network Configuration Tool
This networking wizard will assist you in setting up your patient database properly. Please answer the following questions to continue the setup:
Will you be using ezChartWriter on a network or on a single computer?
O Network O Single Computer
NOTE: ezChartWriter is designed to work on small computer networks (up to 10 computers). More than that will result in performance and speed problems.
Network Tutorial

- 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.

🔄 ezDB Database Creation Tool
EzHealthWare First-time Installation Database Creation
First-time Database Creation Utility
We will now create an empty database to begin using the ezChartWriter software for the first time. This may take several minutes. For a network setup, make sure that you are running this wizard on the primary server (the fastest computer on your network is preferred). Please see the 'networking' section of the user manual for help on making the database visible to other computers on your network.
Where do you want the database located?
C:\ezHW_Data\
Reset to default location
Build New Database

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

🖽 Software Registration 📃 🗖 🔀
Software Registration Utility
THIS PRODUCT IS LICENSED TO:
Unregistered User
DATABASE SERIAL# 69925-644F6-FC489-19D77-BC56C
MODULES: ezClaimBiller ezApptScheduler ezRecallManager ezDataExchange
We make our software freely available and fully functional for testing in the trial version, so that you can try out all the features and see if it really works for you. If you have already purchased a software Registration Code, please enter it below.
Set Account Number
Primary Practice Telephone:
Your clinic phone number serves as your account number.
NOTE: The phone number, shown on Reports/Rx's, is locked in after registering the software.
De situation Options
Twould like to evaluate the settware before purchasing
C Eive (5) day trial period, totally approximate
Thirty (30) day trial: requires filling out a short survey form *
Already purchased a software license? No Yes
You can purchase at any time by visiting: <u>www.ezchartwriter.com</u>
*NOTE: An Internet connection is required. Your survey data is kept confidential.
Reset License Next Cancel

- 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:

Admin Setup Utility



9. Click Next. The System Administrator window displays:

🎄 First Use Start Up Wizard	×
System Administrator Setup Setting the System Admin Password	F
Enter a System Administrator ID and password. The ID can be from 3 to 5 characters long (we recommend you leave the default 'admin') and the password should be 4-20 characters long. THIS IS A VERY IMPORTANT PASSWORD. It will unlock all system functions and can reset ANY user password. Keep it secure and do not post in a conspicous place.	
System Administrator ID admin	
Admin Password	
Confirm Password	
Enter your primary email address (we will use this address to send your password if you should forget it.	
Email Aduress Imadok.di@adi.com	
Press the Next button to continue	
< <u>Back</u>	⊆ancel

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:

🖽 User Setup Utility		X
First-Time	e User's Sett	up
This form will let you setup your You may add an unlimited numbe user at this time.	first few users. It is a er of users in the Admir	advisable to set yourself up as the first user. in section. You must enter a minimum of ONE
Enter the name of the users belo	W:	
User 1: User 2: User 3: User 4: User 5: NOTE: The first time you sign on Username (first initial + last name lowest level and 10 has the higher Internation	to a new user account e). Security level will de est privileges.	User Type Security Se
	Formatting Masl	sk Formatting Preview
General date format:	MM/dd/yyyy	■ 06/11/2008
Telephone formatting:	(999) 999-9999	(912) 345-6789
Postal Code format:	99999-9999	
Measurements:	C Metric 💿 Non-M	Metric Dist: 20' Temp: 98.8 F
		🕐 Next 🔀 Cancel

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.

User Pa	ssword Information
♪	The first time you log onto a user account, the password will be your USERNAME. You will then be asked to set a real password.
	OK

Installing and Setting Up ezChartWriter 26

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

Revi Ve	iew of Informal erify that you ente	tion ered all information	accurately		
You follo reci	u have complet owing details to ords.	ted the first part o make sure the	t of the setup of ezSo y are correct, Be sur	riptWriter. Pleas e to print a copy	e review the for your
	Administrator D) etails			
	System Administrator ID		admin		
	Admin Password		chamelion		
	Email Address		halethab@yahoo.com		
	Practice Name Practice Telephone		practice lee 512-555-5555		
	Primary User D	etails			
	First name	Lee	Username	ljudkins	
	Last name	Judkins	User Password	chamelion	Print
If	the above set	tings are correct	t, press to next to co	ntinue.	

- 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:

You may er remove use provider/sta	nter up to nine ers from the pro aff member who	additior gram se will be	hal users at this t ettings menu. Ti e using THIS com	ime. You car he default use iputer primaril	n always add or er is the y (a default use	n
can be set	tor each compu he name of the de	iter in y	our network, if a	applicable).	Security	
JEIECU	First Name	MI	Last Name	User?	Setting	Hi 🕋
User 1:	Lee		Judkins			
User 2:				0 0	e e e e e e e e e e e e e e e e e e e	
User 3:	[0 0		
User 4:	í I			0 0	æ	
User 5:	[ĺ	0 0	æ	
User 6:	i i		ĺ	0	Û	
User 7:			ĺ	0 0		C ATHONNE STORE
User 8:	i i		İ	0 0	÷.	CHINE HERD
User 9:				0 0		CALIFORNIA STREET
User 10:	[1	0.0	æ	CALIFORNIA (CALIFORNIA)
			1			

Installing and Setting Up ezChartWriter 27

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:

Basic information about	the practice				
Pasic monitation about					
You will now have an wish it to appear on render on the not applicable.	opportunity to eports, prescrip	enter basic infi tions and lette	ormation about rhead. Leave f	your practice, as y ields blank if they a	'OU are
Doctor(s) Name/Title				-	
(to appear on reports)	1				
Practice/Clinic Name	practice lee				
Practice Address1				-	
Practice Address2					
Practice City					
Practice State		ZipCode			
Practice Telephone Practice Fax	512-555-5555		Group Pra	actice TIN	
Practice Email			Group NF	<u>ч</u>	
Practice Website					
Press the Next button	i to continue				

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.

🔄 My Documents			
File Edit View Favorites	Tools	Help	
0-0-0	📄 Мар	Network Drive	
Address Address My Documents	= Disc Sync	onnect Network Drive thronize	
Folders ×	lai Fold	er Options	
🞯 Desktop	my FICCO	n es	

- 3. Click the **Browse** button.
- 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.

Map Network Drive			×
	Vindows can help you conne and assign a drive letter to to access the folder using My C pecify the drive letter for the hat you want to connect to prive: S: folder: S: folder: srv1\ <yourgroup Example: \\server\ Reconnect at le Connect using a di</yourgroup 	ect to a shared net the connection so t computer. the connection and the connection and share >\$ share >\$ cogon fferent user name	work folder hat you can the folder prowse
	Sign up for online : network server, < Back	storage or connect	to a Cancel

- 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.

🔁 ezChartWriter - Chart Central		
Ele Ghart Actions Help		
ezCha	ezHealthWare Software Suite	M
	User Login	Video Tour
CPEN 	Administrator	User's Manual
	Extend to 30-Day Trial 😼 Purchase Soft	imare Nowl

Using ezChartWriter 34

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.

Se Administrator Functions	
🥵 System Administrat	or Menu
Software Account	Reset Passwords
Settings & Options	View Audit Trail
	🕜 🌌 SysInfo 🔀 Close

Manage Account

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

Manage Account Menu	E
Manage Account M	1enu
THIS PRODUCT IS LICENSED TO:	
Main Street Vision Practice Tel# 444111 TRIAL MODE - You have 5 day(s) left be	2222 sfore trial expires.
Please purchase a software license at www.ezD	harfWriter.com
Purchase Now!	View Licenses
Register Software	Clinic Telephone
	Close

Using ezChartWriter 36
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.

🛓 Settings		×
K Program	o Settings & Options - Ad	dmin Level
Clinic Details/Report Display	User Details/Security Global Security Setti	ings International Defaults
The information entered or	n this page effects the data displayed on your reports	and exam printouts.
Doctor(s) Name/Title	Ima K Doctor, OD	(as it will appear on reports)
Practice/Clinic Name	Main Street Vision	
Practice Address1	1234 Main Street	
Practice Address2		
Practice City	Smallville	
Practice State	NE ZipCode 44888	
Practice Telephone	4441112222 (ZEdit) Group Pr	ractice TIN
Practice Fax		
Practice Email	Group N	PI (if applicable)
Practice Website		
👕 Set Database	🕜 🗸 Okay	🗙 Cancel 🚺 Apply

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.

Settings					
	ram Settin	IGS & Is/Security	Options -		evel
LastName	FirstName	мі		SecurityLevel	Active
Pediigo	David	J	Provider		10 🗸
Smith	Diana	R	Staff		1 🗸
User count: 2		(Actions	W Edit Entry D	Pelete
💣 Set Databa	ise		🕐 🗸 Oka	y X Cancel	Apply

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.

🎟 User Details		×
🎎 Edit User	Details	
User Details First Name	MI Last Name Degree	
Title/Position	D Type ID Number	
State Lic#	OtherID2	
DEA#	Security Settings	
UPIN	UserName:	
NPI	Security Setting: Not Set User Type: Staff Set as the default Provider for your clinic?	
L	🕜 🖳 Save 💢 Cance	*

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 <u>User Security</u> 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).

	r ofmaking Mask	Formatting Freview
General date format:	MM/dd/yyyy 🚽	06/11/2008
Telephone formatting:	(999) 999-9999 🔍 👻	(912) 345-6789
Postal Code format:	99999-9999 💌	45678
Measurements:	O Metric 💿 Non-Metric	Dist: 20' Temp: 98.8 F

Accessing the Setup Wizard

The System Administrator can click the **Setup Wizard** button at the bottom-left of the <u>Admin Settings</u> 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 <u>Setup Wizard</u> 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.

🔗 Password Reset Tool	×
Reset Password Options	
NOTE: Resetting the password(s) sets the password equal to the user name. The user must then change it the next time a logon attempt is made. Example: for us Joe Smith, reset password will be jsmith.	er
Reset ALL user passwords Reset a specific user	
User: Idokter	
🕜 🗸 Okay 🔀 Cance	" "

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.



Select Patient Name All Module Show All	Action Show A	User JI 💽 1	ype/Object Show All	Date From 10/30 Sort by TimeStam	V2007 • To 10/30/2007 p • Descending	•
TransID Module_N	Action_N	ObjectType_N	Patient	User_N	TimeStamp	
10422 ezChartWriter	Login	Admin	n/a	Admin	6/11/2008 5:54:24 PM	
10421 ezChartWriter	Start	Application	n/a		6/11/2008 5:54:20 PM	_
10420 ezChartWriter	Open	Application	n/a	A CONTRACTOR AND A CONTRACTOR	6/11/2008 5:54:19 PM	
10419 ezChartWriter	None	None	n/a	Pedigo, David J	6/11/2008 5:53:53 PM	
10418 ezChartWriter	None	None	Tewalt, Rory	Pedigo, David J	6/11/2008 5:53:52 PM	
10417 ezChartWriter	End	Application	n/a	Pedigo, David J	6/11/2008 5:18:09 PM	

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.
- <u>Pulled Patient Charts</u>: 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.
- <u>Special Functions</u>: Provides access to special utilities and software functions, such as database backup and compact/repair, the <u>Rolodex</u>, the <u>Report Designer</u>, and various others.
- <u>Program Settings</u>: 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.

Demographics	More Info	HIPAA	Notes	NEW PATH	ENT CHART)
Guarantor	Self	X	Gender	C Male C Female	No.	
Last Name	Smith		Date of Birth	_/_/	Age	
First Name	Joe	Initial	Social Security			
Title	Suffix	•	Provider	Pedigo, David		
Address			Primary Insura	nce		
Address			Ins Company		•	
City		-	Insured Name	Self		
State/ZIP		•	Relationship	Patient G	uarantor	S.
Home Phone			Insured ID#			ith
Day Phone			Policy Group#			, H
Email			Authorization#			e
Employer			Notes		~	
Occupation					×	
Prior Exam:		HIPAA No	tification on file?	Bad Address	Inactive	-
			(6
Marint 👹				🥑 🔓 Save	Close	_ ≤

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.

Nickname Joe Marital Status Married Hobbies Image: Comparing the state of the state	Demographics 🔥 More Info HIPAA		
Alerts Legal name change: Was Test Policy Group# Authorization# Notes	Nickname Joe Marital Status Married Hobbies Image: Constant of the second seco	Race/Ethnicity Image: Constraint of the state of the stat	Test, Te
	Alerts	Policy Group# Authorization# Notes	est T

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.

Demographics M	lore Info HIPA	A Notes	VIEW PATI	ENT CHART	
Notification of F	rivacy Policy				
🖌 HIPAA 'Notic	e of Privacy Practices' read	and understood			
Acknowledge	ement on file	Nri	nt Record Rel	ease Form	
Date	Recipient of Records	Reason for Disclosure	Recorded By	Auth Ber	
					н
		Add	New Print Dis	closure List	est
Patient-Specifi	c Privacy Notes/Reque	ests			
					Tes
					÷
, Original Deficient A				_	
Uriginal Patient A	cquistion Date	Recall Date	01/27/2004		
🍋 Print 🛛	Encounters) 📙 Save	e 🛛 🌋 Close 🛛	

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.

Demographics More Info HIPAA 🔎 Notes VIEW PATIENT CHART	
Image: Second system Image: Second system Image: Second system Image: Add Time/Date Stamp	
Patient called to provide secondary insurance information. She reports that her Aetna plan was terminated and she no longer has coverage. Sending bill to patient today.	
[The above was entered on 03/19/2006 04:15 pm, by user Staffmember, Ima]	
	Test
	E E
	est
Print Encounters]] •••

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.

ezChartWriter - Chart Central				
jle Chart Actions Help				
EzC	har	thWare So		
	13 0		Demographics	orts/Rx
0	BICIDIE	FIGH	J K L M N O P Q R S T U V W X Y	Z
	Last Name	First Name	MI Pat D# DOB Insurance Last Evam Physician Nam	-
	Cost Hallo	Ball	00513 05/22/1931 05/35/2008 Pedias David J	
	in Action	Bret	60109 10/29/1969 63/04/2008 Perios Cevit J	
NEW	A A CUINE	Sheley	00600 0200/1979 06/03/2008 Pedigs Cavid J	
	18 Adama	Brittiney	W 00618 05/26/1990 06/06/2008 Pedigs Cavid J	
	Aebersold	Karti	00316 0512/1973 04/05/2006 Pedigs Cavid J	
	IR Alatome	Juana	00567 10/00/1968 05/27/2008 Pedigs. Cavid J	
	Alan	JLoma	00102 04/27/1933 03/04/2008 Pedigs Cavid J	
	IR Allen	Stephen	G 00231 02/08/1958 03/24/2008 Pedigs Cavid J	
	Alunbaugh	Michael	D 00156 1105/1982 03/12/2005 Pedigs Cavid J	
0	IR Anderson	Ashiey	L 00641 05/25/1982 06/10/2008 Pedige, Cavid J	
	Andes	Rery	E 00483 06/29/1976 05/25/2008 Pedigs Cavid J	
PT/	(ii) Arambula	Gabriela	00619 12/19/1982 06/06/2008 Pedigs. Cavid J	
Concret I	(a) Armenta	Anthony	L 00616 07/11/1959 06/06/2008 Pedigs Cavid J	
OPEN	IR Assirk	Robert	00575 01/13/1909 05/25/2008 Pedigs. Cavid J	
	Aumilier	Rita	00069 01/16/1937 02/27/2006 Pedign Cavid J	
and the second se	IR Aven	Ruth	A 00346 05/22/1946 04/14/2008 Pedige Cavid J	
	Aver8	Kima	00135 0910/1995 03/10/2008 Pedigs Cavid J	
	E Aules	Guadalupe	00516 06/05/1985 05/16/2028 Pedge, Cavid J	
	ment All Physicia wsician:	ans	💌 🇊 Delete Chart 📔 New Chart 🎒 Show All	Okay

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.

+ A:	Pull Chart
	View Demographics
Η At	Utan Dana MiDula
+ Ał	view Report/RX's
+ A⊧	Write a Note
⊞ Ał	On an New Description
- AI	Open New Report/RX
+ A	
+ Ał	Bad Address
+ A⊧	Mark as Inactive
+ Ał	Delete Patient
⊡ Ał	Merge Duplicates
	merge pupilcates
H At	
	Exit

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.

Pulled Patient Charts	(2)	
diaberroom, Baad		~
Williammigg, Jiammican		
Wincondin, JAnney		1 () () () () () () () () () (
Scarryphan, Johan		
Sholl, Hanya		
Trassvall, ITrass		
THANK, CARNER		
Writing, Rawelling		
		- E
		5.
Chart Options Close All Signed Charts		
	Main 🕐 🔐	ogOut. 🗶 Q

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.

Chart Options || Close All Signed Charts

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**.

8		4
---	--	---

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.

E xams	St, To All Pa	est ages	F R×	s R	eports	Notes		Name: Chart#: D0B: Provider:	Test, Tesl <mark>02955</mark> 12/30/19(: 5 6
1	уре	Dat	е	Status			Description	ı		Provider
<adc< td=""><td>New></td><td></td><td></td><td></td><td>Double</td><td>click to add ne</td><td>w Rx, Report</td><td>t or Note</td><td></td><td></td></adc<>	New>				Double	click to add ne	w Rx, Report	t or Note		
RΧ		03/19/	2007	PENDING	Med Rx	(Alphagan P)			Pe	edigo, David
	_									
	View	LogBoo	k [🗾 Sign]		۵ 👷)emographics		Pulled Charts
Juick	Heln: D	ouble clic	sk an it	em in the list	to open or	view Biaht cli	ck for more o	hoices		

Edit Demographics

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

Guarantor Self Gender Male C Female No. Last Name Smith Date of Bith _/_/Age First Name Joe Initial Social Security Title Image: Suffix Provider Pedigo, David Address Image: Suffix Primary Insurance Address Image: Self Image: Self City Image: Self Relationship Patient State/ZIP Image: Self Image: Self Day Phone Image: Self Image: Self Day Phone Policy Group# Authorization# Email Notes Image: Self Occupation Image: Self Image: Self	Demographics	More Info HIPAA	Notes NEW PATIENT CHART
Last Name Smith Date of Bith / Age First Name Joe Initial Social Security Title Suffix Provider Pedigo, David Address	Guarantor	Self 🗙	Gender O Male O Female No.
First Name Joe Initial Social Security Title Suffix Provider Pedigo, David Address Primay Insurance Address Ins Company Insured Name City State/ZIP Poly Home Phone Policy Group# Policy Group# Day Phone Authorization# Notes Email Notes Image: Second	Last Name	Smith	Date of Birth _/_/ Age
Title Suffix Provider Pedigo, David Address Primary Insurance Address Ins Company City Insured Name Self State/ZIP Patient Guarantor Home Phone Insured ID# Day Phone Policy Group# Email Authorization# Dccupation Notes	First Name	Joe Initial	Social Security
Address Address Address City State/ZIP Joge Phone Day Phone Email Email Dccupation Primary Insurance Ins Company Insured Name Self Relationship Patient C Guarantor Insured ID# Policy Group# Notes	Title	Suffix S	Provider Pedigo, David
Address City State/ZIP Home Phone Day Phone Email Employer Occupation	Address		Primary Insurance
City Insured Name Self State/ZIP Insured Name Self Home Phone Insured ID# Insured ID# Day Phone Policy Group# Authorization# Email Authorization# Insured ID# Dccupation Insured ID# Insured ID#	Address		Ins Company
State/ZIP Image: Constraint of the state	City		Insured Name Self
Home Phone Insured ID# Day Phone Policy Group# Email Authorization# Employer Notes Occupation Image: Comparison of the second seco	State/ZIP		Relationship Patient Guarantor
Day Phone Policy Group# Email Authorization# Employer Notes Occupation Image: Constraint of the second of the secon	Home Phone		Insured ID#
Email Authorization# Employer Notes Occupation Image: Constraint of the second	Day Phone		Policy Group#
Employer Notes A	Email		Authorization#
Occupation	Employer		Notes
	Occupation		
Prior Exam: HIPAA Notification on file? Bad Address Inactive	Prior Exam:	HIPAA No	otification on file? 🔲 Bad Address 🔲 Inactive
		1	
Print Save X Close	Print		Save Close

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.

🐂 Modify Patient Name	
🥡 Modify Patient Name in Database	
Current Last Name: Test Current First Name: Test	
WARNING: You are about to change the patient's name as stored primary database. Note that altering the patient's name will not chan then name listed on previously FINALIZED reports and/or encounte	l in the nge ers.
- Update Patient Name	
New Last Name: Test New First Name: Test	
Reason for name change: Misspelled	
🕜 🗸 Okay 🔀 C	ancel

Message Manager

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

- Sticky NoteBilling Note
- e-Reminder
- Clinical Note

🛢, Message Manager - Test, Test	
📄 Message Manage	er Menu
Sticky Note	Billing Note
eReminder	Clinical Note
	Close

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.

📕 Inbox				
📝 eReminder Ma	nager			
🔌 New effeninder 🕮 User Gro	🕫 🔀 Delete Mig			
🐥 Message Manager	Patient Name	Subject	Action Date Se	nt By
🖻 🎒 eReninder	Gatter, Nina	VF's and IOP	3/14/2007 dp	edigo
- 🖹 Inboi	Richter, Marie M	needo VF	3/8/2007 dp	oglo
Conpleted & Aldrived	Schlack, David	F/u on ON	3/8/2007 dp	edigo
Deleted literat	Aardona, Elizabeth A		3/8/2007 dp	ogile
- Casenian				
	From :	Be: Ar	tion Due Date :	
	Subject :			
			?	K Close

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.

🔀 New Me	ssage	×
	eReminder Message Editor	
To:	Action Date : 📓 /12/2007 💌	
Re:	Click to Select Patient Patient ID :	
Subject :		
Urgency :	Normal Mark as confidential (will require password to open)	
🖻 🖻	et Font 🖪 🗾 🗓 🗅 🐰 🗈 🛍 🗠 😁	_
	🕐 Okay 🗶 Clos	se

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.

Create Group		2
🕵 Us	er Group I	Lists
Name of Group :	T New	Delete Modify
Available Users:	0	unent Members of Group:
dpedigo ipedigo ihealey abaiban idokter kglenn	>> < <<	
		🕐 🗶 Close

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:

Action Taken : 📑 Mark as Completed 🗙 Discard	🛛 🧈 Assign to Another User 📝 Reset Due Date 🗸
--	---

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:

Special Functions Menu	\mathbf{X}
<i>Special Functions</i>	Menu
Database Maintenance	Miscellaneous Functions
Backup Database	Report Designer
Compact/Repair	Rolodex Utility
Software Maintenance	Data Management
Report a Bug	Reports/Statistics
Auto Update	Archive Charts
	Close

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).

岁 ezHealth\	Ware Backup 📃 🗖 🔀
	Backup your ezHealthWare databases to compressed (.zip) file and/or CD-ROM
	NOTE: All users must be logged off (on all computers) during the entire time that the backup is in progress. Failure to do so may result in loss of data!
	The backup process may take from several seconds to many minutes, depending on the size of the main database. Please be patient until the process completes. Once the ZIP file has been built, you will have the option of burning it to a CD-ROM disc (only available on newer versions of Windows XP).
Location to sa	ve ZIP file (defaults to local directory):
C:\ezHW_Ba	ckup\ 🔁
Progress	
Backup log:	
Waiting to be	gin backup
	×
<	
V Start I	Backup 🕑 Burn CD Disc 🕜 🔀 Close

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

Report a Bug
Report a bug using the form below: Please upload your bug report to our website or print form, fill out completely and FAX or MAIL to the address at the bottom of the form. Your help is greatly appreciated!
Bug Report Form
Name/Clinic: practice lee
Jser: Judkins, Lee
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.
Please be as specific as possible when describing the problem!
What version of ezHealthWare software are you using?: ezScriptWriter 2.50
What operating system are you using:
Please provide a brief description of the problem:
Please list the steps required to cause the problem:
Please write down the exact error message displayed and enter it here:
🕜 Upload 🍓 Print 😧 🗶 Cle

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:

🖪 Report Template Editor		
Choose the Report to Edit:	Sort by: 💿 Name 🔿	Туре
Report Description	Туре	
Cataracts	HANDPAT	
Collections Letter	CORPAT	
Color Deficency	HANDPAT	
Consent - Surgical Comanagement	MISCFORM	
Consent - Surgical Procedure	MISCFORM	
Consent Form - Dilation	MISCFORM	
Consultation Request Form	REFERRAL	
Contact Lens FAQ	HANDPAT	
Contact Lens Follow-Up Agreement	CLFORM	
Contact Lens Order Form	CLFORM	-
New Remove Rename	Edit	Close

Step A: Select an appropriate category for the report. If the report does not easily fit one of the predefined 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.

Report Design Mode	Insert Field	
B Z U E E E	DESCRIPTION	CODE 🔼
	Date - Today's date	[[Today Date]]
- T T T	Date - Today's date + 1 year	[[Today Date+
1 10 9 7 10	Date - Today's date + 2 years	[[Today Date+
	Date - Last exam	[[Last Exam]]
	Date - Last exam + 1 year	[[Last Exam+1
	Date - Last exam + 2 years	[[Last Exam+2
	Date - Request date from user	[[Request Dat
	🖌 Patient - Name (Full, First Last)	[[FirstLastNam
	Patient - Name (Full, Last,First)	[[LastFirstMI]]
	Patient - Name (First only)	[[FirstName]]
stl	Patient - Name (Last or 1	[[LastName]]
	Patient - Salut	.[[NameTitle]]

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.

Rolodex	×
All Consultant PCP Specialitet Other New Entry Edit Delete Deve Eherges LastName FirstName Clric Hamiton Steven MD <neuro-ophthalmic consult.<="" td=""> LastVairs Steven MD<abre &="" centrel="" laser="" més.<="" td=""> Taley-Rostov Audrey MD<noithwest associates<="" eye="" td=""></noithwest></abre></neuro-ophthalmic>	Type of Robdex Enty (multiple selections okay) Consultant: POP Last Name Last/ads Filet Name Steven Initial Itil Title Degree Diffic Aldure Laser Center & Med Spa Address 1223 Madison Address Ste 615 City Kirkland State W/A ZIP JOEI 386-2700 Fax Email UPIN Specially Bispheroplasty Notes Cosmetic Lid/Face
I	🕐 Okay 💢 Close

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:

Detions - General Setting Progra	m Settings & Options - User Level
Questions : Ceneral Settings User Details Folder Paths Custom Lists Report Settings Tool Settings	General Settings Date Format for Logbook Entries C mm/dd/yy @ mm/dd/yyyy C dd/mm/yy mm/dd/yyyy ■ Date Format for Reports C mm/dd/yy @ mm/dd/yyyy C dd/mm/yy mm/dd/yyyy ■ Disable file file cabinet sounds ✓ Auto-select provider for reports/Rx's as currently logged user ✓ Auto-select HIPAA notification for each new patient Default report to use for Record Release:
Help	Record Release Request
	Cancel Apply

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

🖇 Subjective Findings				
Subjective Find	lings Tool			
Preliminary Findings	Complaints	SDAPwriter		Preview
Quick Fill Template			Race/Ethnicity:	▼ 24 yo M
Patient Type	Patient Status		Last Eye Exa	m
 New Patient Estab. Patient Prior Patient (>5 years ago) Previous Patient of prior Dr. 	EMR exists Records scann Records lost/us Previous paper	ed navailable record	Time since last at Location of	exam 💌
Encounter Type				
Comprehensive eye exam. Intermediate eye exam. Contact lens follow-up. Pr Contact lens follow-up. Pr Cocular Review of Symptoms	efraction. Pediatri edical eye exam. Adolesc ogress check. SRx Re Subjective History	c exam. Cont. cent exam. Cont. ccheck. Othe	act lens fit only. act lens evaluation. r: Post-Op Evaluation	VA check.
No ocular symptoms noted.	Ocular Hx Socia Medical Hx RC	al Hx Family Hx IS Medications	Allergies Details >>	6 /11/2008 ▼ □ Outside records.
Patient Hx Preview (move mouse pointer	over button to review and/or e	dit text)		
HPI Wizard Coul	ar Sx's Somputer Lensomet	ry 🔏 Occupat	tion button to revis	iew (move mouse pointer over ew and/or edit text)
Customize				V Okay X Close

Encounters 69

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 sentances. 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.

ToolBox

🎾 HPI Wizard	💿 Ocular Sx's	Computer Use	8 Occupation
Prior History	Contact Tool	Contraction Lensometry	🔏 Hobbies

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.

🔳 HPI Wizard	
📋 HPI	Wizard
Use the dropdov Remember, to m HPI criteria.	wn boxes below to select the closest match (or enter free-text), eet Medicare guidelines you must select at least FOUR of the
Location:	
Onset:	
Severity:	
Duration/Status:	
Modifying Factors:	
	🕜 🗸 Okay 💢 Close

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.

ASTE TO	C Doular Symptoms C Divid Comp	laint	
-	Flashes	×	Distorted/warped vision
đ	× Floaters	×	Glare/light sensitivity
	X Double vision	×	Dryness/burning
	× Pain	×	Itching eyes/eyelids
	× Fluctuating vision	×	Foreign body sensation
-	Blackout of vision	×	Tired eyes/asthenopia
	× Discharge	×	Eye turn
	X Excessive tearing	×	Film over eyes
	X Redness/infection	×	Halos around lights
	X Loss of side vision	×	Crusting eyelashes
	X Drooping eyelid	×	Bump on eye/eyelid
	X Test Custom	×	<custom6></custom6>
	Custom2>	×	<custom7></custom7>
	Custom3>	×	<custom8></custom8>
	× <custom4></custom4>	×	<custom9></custom9>
1	 Custom5> 	×	<custom10></custom10>
	Customos		-ousion to-

Encounters 72
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.

🖻 Search for Histori	cal Data						
Prior Exams:	Patient: Tewalt, Rory	Include Pending					
Date Stat 06/09/2008 FIN	us Description AL 940.30 Corneal And Conjunctival Chemical Burn						
Selected Encounter D	ate: 06/09/2008 Set 'Review Date' to match the	select prior Hx.					
Current and past h history of ocular st	Ocular History Check the History sections that you wish to import to current record. Current and past history is unremarkable for ocular diseases, injuries and amblyopia. In addition there is no history of ocular surgery.						
Medical History Unremarkable for past major illnesses, past surgeries or injuries. Patient denies diabetes, hypertension, heart disease and lung disease. Denies thyroid problems, cancer, inflammatory and infections disease.							
Review of Sys	tems						
Family History Patient denies pertinent family history including blindness, glaucoma, macular degeneration and retinal detachment. In addition, pertinent systemic family history is unremarkable.							
Social History		~					
Select/Unselect A	I Select	t X Close					

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.

	uiai nx	SOCIAL HIX	Family HX	Allergies
🔍 Me	dical Hx	ROS	Medications	Details >>

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:

Quick H	listory Form			- 🛃
Medica DE DE DE	Al History More NIES Diabetes DEI NIES Hypertension DEI NIES Heart Disease DEI NIES Lung Disease DEI	ILES X Thyroid Disease ILES X Cancer ILES X Inflammatory Disease ILES X Infectious Disease	Medications Customize	e nin t
Ocular DE DE	History More NIES X Amblyopia DE NIES X Strabismus DE NIES X Injuries DE NIES X Surgeries DE	IES X Field Loss IES X Cataracts IES X Glaucoma IES X Macular Degneration	2 Clear List	
Review	v of Systems		Alleray History Customize	e
Ð	General Health Constitutional HEENT Neurological Hematologic Musculoskelatal Gastrointestinal Psychiatric	Tobacco Use Cardiovascular Respiratory Allergic/Immunologic Endocrine Dermatologic Genital-uro Reproductive	No known drug allergies: Pericilin Sulfa drug Add to Lis Remove Clear List	gs k
Family	History Adopted; no hi	storical record	Social History Tobacco Use Alcohol Use Other	
CLEAR			🕜 🗸 Okay 🔀 Car	ncel

SCREENSHOTS OF OTHER TOOLS

Below are some screenshots of the other Encounter Tools:

	NS: Click on the appropriate item under each heading. :	Select New or Estab Patient with to	p buttons.
Chief complaint HPI 1-3 elements HPI 4+ elements Review of min 3 chron Ocular review of syste RDS (Systemic) 1-8 sy RDS (Systemic) 9+ sys Past medical history Family history	ic/inactive conditions ms stems tems		Calculated listory Levet: 0
XAMINATION Exam 1-5 elements do Exam 6-8 elements doc Exam 9 elements docu Exam - all elements, sin	cumented cumented mented ngle system specialty		evel: 0
ECISION MAKING		1	laking evet
Minimal number of diag Limited number of diag Multiple number of diag Extensive number of d 	noses/management options noses/management options gnoses/management options agnoses/management options lata to be reviewed ata to be reviewed		
stablished Patients rev	suite only 2 of 3 catagories to bill at that level.		

Sign & Review			×
Review Er	<u>ncounter</u>		View Pending
Task Completion:			
🔀 Chief Complaint	💽 Visual Acuity	🔀 Visual Fields	🔀 Diagnosis/Assessment
🔀 Medical Hx	💽 Refraction	🔀 Basic SLE	🔀 Plan/Treatment
🔀 Ocular Hx	💽 Final Spec Rx	🔀 Angle Assessment	🔀 Billing/Coding
🔀 Medications	💽 Print SBx	🔀 Tonometry	ך 🔀 Contacts (Subjective)
🔀 Family Hx	🔀 Pupils	🔀 ONH Evaluation	💽 Final Contact Rx
🔀 Allergies	🔀 EOMS	🔀 Ophthalmoscopy	Print CLRx
Flagged Results: NO FLAGGED RES	ULTS		×
Sign Enco	<u>unter</u>	Select Nex Month: 136	t Recall: Year: <u>1 2 3</u> 6/9/2009 ❤ Ⅹ
By checking the "I button you are ren associated report thoroughly review record is a legal c	AGREE" box and clicking the dering this encounter and all s unalterable. Make sure that ed the record before signing. ocumentation of the patient en	Finalize you have □ I AGREE This iccounter.	Sign & Finalize Encounter
🤞 Billing Tool	Export to PDF		Close

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

🚰 Visual A	cuity			_ 🗆 🔀
Format: 💿	Snellen 🔿 Me	etric 🔿 Decimal		Display Bilataral Acuity
OD - Ri	iaht	OS-Le	ft	Select Correction Type
20/20	4 H 🗙	20/20		ccDVA
20/10 20/15 20/20 20/25 20/30 20/40 20/50 20/60 20/70 20/70 20/80	20/200 20/400 20/800 CF @ 3' CF @ 6' HM @ 3' HM @ 6' LP NLP NLP	20/10 20/15 20/20 20/25 20/30 20/40 20/50 20/60 20/70 20/80	20/200 20/400 20/800 CF @ 3' CF @ 6' HM @ 3' HM @ 6' LP NLP NLP	(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 ccNVA ccl DVA
20/100	<u>NR</u>	<u>20/100</u> + ++	<u>NR</u>	W/ CL's (DVA with correction) (DVA without correction) (D) (A with conviction trial lens)
PH		PH		(without correction) Allen Symbols
CLEAR				🕜 🗸 Okay 💢 Close

🖽 Visual Acuity T	ool		_ 🗆 🔀
E Vi FP TOZ LPED EDFCZP	Acuity #1	iity 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)	Acuity #2	OMIT	
add more acuities, use the checkbox on the left to omit prior acuities so they are not pasted in duplicate.	Acuity #3	OMIT	
Customize	CLEAR	🕜 🗸 Okay 🕽	Close



🚱 Refractive Findings	
Subjective Refraction	Additional Data
D OMIT	Retinoscopy Trial Frame Demo Refraction Comments
[™] OD (< 🖹 →) OS	Refractive Summary Instrument Data Binocular Assessment
dos 00.0 dos 00.0	
Sph	
Cyl	
Asis	
001 030 045 060 090 120 135 150 180	
U.UU Q J U.UU DDICM +1.00 +2.00 +3.00 +4.00 DDICM	
Prior	in the second seco
OD DVA - OD NVA -	
OS DVA V BB OS NVA V	10502
	1380.
1/4 Reset	
Final SRx 🔹	2nd SRx 🔹
OD () OS	OD () OS
0.00 sph 0.00 sph	0.00 sph 0.00 sph
Cab	
spn	
Су	()
	001 045 090 135 180
PRISM +1.00 +2.00 +3.00 +4.00 PRISM	0.00 0- 0.00
1/4 Beset 1	PRISM +1.00 +2.00 +3.00 +4.00 PRISM
Customize CLEAR	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 <u>remembers</u> all your edits from the moment you selected the current node (enabling you to press Ctrl+Z successively to backtrack through your edits), but <u>forgets</u> 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 <u>move</u> text from one location to another within the same report. You can also use this to <u>break up</u> an report into smaller chunks by dragging and dropping each section where you wish it to be located. You can also <u>copy</u> 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 <u>many more</u> formatting attributes such as <u>color</u> to be incorporated. Adding <u>color</u> 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 <u>smaller</u>, 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 <u>reformatting</u> 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 <u>Copying and moving text</u>), 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.

🧽 ezChartWriter - I	Report Preview - [Leti	tei	for PCP (Diabetic)]								
📑 File Edit View	Insert Format Table	N	Vindow Help								
🗅 🚄 🖬 🏻 🎒 🖸	Text			Report	Dispo	osition:	Store	Sign	Sa	ve as .pdf	
[Normal]	Headers/Footnotes	×	12	в I	U		돌돌	100%	-	12 1 2	Ī
	Image		At Caret Position						-		
	Object	٢.	As Fixed Object	 +		+	+	¥	¥	+	+
	Page Break			 	⁸	l ⁹					.1 <u>15</u>

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	Row1 Col 2
Row 2 Col 1	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 <u>restore</u> 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 <u>previously</u>, 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 <u>Moving and copying text from</u> <u>cell to cell</u>; 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 <u>inserting a new row or</u> <u>column</u> 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 <u>or more</u> highlighted rows and paste them as separate tables, rearrange them vertically to form a new sequence and then join them. See <u>Moving and copying tables</u>.

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 <u>copy</u> <u>one or more highlighted rows</u> 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 bbbbb	Table 1		
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 <u>top</u> 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	
— • •		



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

Cell 1	
Cell 3	

Cell 2	
00112	

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
Figu	ire 3
·	
Cell 1 floor hidden	Cell 2
Cell 3 ceiling visible	Cell 4
Figu	re 4
-	
Cell 1 floor hidden	Cell 2
Cell 3 ceiling hidden	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 <u>Editing text in tables</u>.

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 b	order(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 di	sabled 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 whether whether the second se	nich 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

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