

MyNoteGen™ Manual

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Introduction To MyNoteGen™

MyNoteGen™ allows you to completely take charge of your medical care using a Personal Digital Assistant (PDA). *MyNoteGen*™ promotes interaction between you and your physicians and other healthcare providers. Data entry is simple and rapid and does not require using a keyboard or graffiti pad. Our goal is to create software that (1) enables patients and practitioners to efficiently take advantage of the vast resources available in the health care arena, (2) promotes better compliance and understanding of medical regimens, and (3) improves communication between patient and practitioners while still paying homage to the ancient principles of medical practice. We hope that *MyNoteGen*™ accomplishes this goal and is transparent to the user and practitioner.

MyNoteGen™ consists of five components

- **My Encounters**
- **My Treatment**
- **My Diagnosis**
- **My Questionnaires**
- **My Diary**

Together, they may used to gather and display data from your medical chart and permit you to record medical regimen data and answer questionnaires for the next visit. Data can be transmitted by beaming, synchronizing over the internet or with some other Network Server. Data can be stored in native Palm Format, Spreadsheets, or any SQL database (such as Microsoft Access™ using **NGen Network**™).

Help “Tips” for each window are available by tapping on the menu selection, “Help” and selecting “Tips”. Color coding on a PDA improves readability and speed of data entry.

Please note that NoteGen Solutions, Inc. (Note Gen) is providing only a tool to record patient and encounters quickly and efficiently. The responsibility for the veracity of the data recorded and for the clinical management of the patient belongs solely to the patient and to the medical practitioner. NoteGen assumes that all clinical decisions will be based upon careful review of the clinical data and that MyNoteGen data will be read, authenticated, and signed by the medical practitioner.

Color Coding Conventions in *MyNoteGen*TM

Color Coding is available on many PDA's and greatly enhances the ease of use for this software. Color coding conventions are listed in **Table 1**.

Table 1: Color Coding Conventions

Color	Explanation
Yellow	User entry is permitted into fields and grids that show this color
Light Green	User data entry is not permitted into fields and grids that show this color.
Bright Green	Tapping this column in a single or multiple dimension selection box adds the phrase to the Note without any modifiers.
Grey	Tapping this cell has no impact. It is unavailable for data entry.
Red	Delete this row of data.

MyNoteGen™ Main Window

You must enter a password each time you enter *MyNoteGen™* (see **Figure 1**). We strongly recommend that you also acquire a power-on security program to further enhance the security of your personal digital assistant (i.e., **PDA**). All users are provided with the same initial password: 12345. Please be sure to change this password immediately after you register and make certain that you place a copy in a secure location or you may risk losing all of your data!

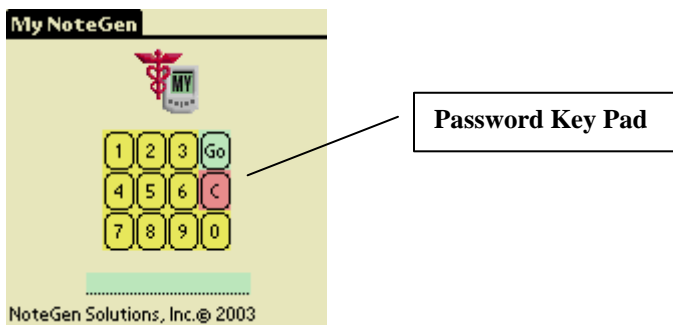


Figure 1: Main Menu and Password Key Pad

The *MyNoteGen™* Main Window provides the gateway to the main features *MyNoteGen™* and is displayed in **Figure 2** and discussed in **Table 2**.

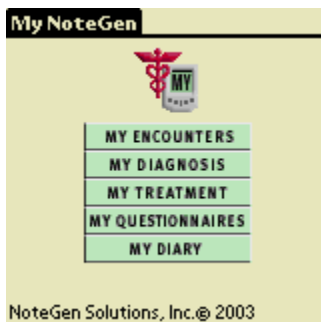


Figure 2: *MyNoteGen™* Main Window

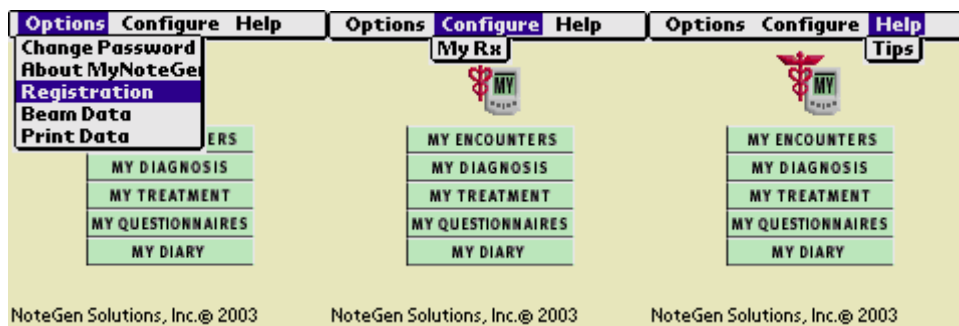
Table 2: Main Window Buttons

Button	Function
My Encounters	Purpose: Review details of the last encounter with their health care provider. Tap on the My Encounters Button to view the data from your last encounter with your health care provider.
My Diagnosis	Purpose: Review the current problem list. Tap on the My Diagnosis Button to view the current diagnosis (i.e., problem) list.
My Treatment	Purpose: Review the current treatment list. Tap on the My Treatment Button to view the current treatment program. Treatment is divided between Medications and other forms of therapy (such as exercise programs, diets, physical therapy).
My Questionnaires	Purpose: Answer a general or specific questionnaire pertaining to your health. Tap on the My Questionnaires button to begin answering a series of questions that have been posed by your health care practitioner to help manage your health care.
My Diary	Purpose: Enter historical data into a diary regarding current treatment regimen/ Tap on the My Diary Button to begin entering data into a diary.

Several options are available in the **Main Menu Window**. They may be accessed by tapping the **Menu Bar** (i.e., the Menu). Options are listed in **Table 3** and displayed in **Figure 3**.

Table 3: Main Window Menu Options

Option	Function
About:	View information about this system including NoteGen Solutions, Inc. contact information, version number, registration code, serial code, etc
Security	Change system password.
Registration	Enter a unique registration code.
Beam	Beam Diary and Questionnaire data back to your physician's computer or PDA. .
Print	Print your Diary and Questionnaire data.
Configure	Configure the Treatment data in your Diary.
Tips	Review important features regarding this window.



**Figure 3: Menu Options:
Main Menu**

Main Window Tips:

- To enter a password, tap your password's numeric characters into the keypad. You may also enter the characters directly into the password text box (the line below the keypad). As you tap, you will see a series of “#” characters form in the password text box representing your entries. When you have finished entering your password, tap on the “Go” button or if you have made an error, tap on the “Clear” button (C) and start entering again. You may also enter alpha characters but you must use either graffiti or the PDA keyboard to place these characters onto the password line.
- To change the password, tap on the Menu Options: then tap Security, and enter your old and new passwords. Confirm that you have entered the intended password before exiting. The new password will now be active.
- You may register in the Main Window. Tap on the Menu Options: select Registration and enter the NoteGen-provided registration number. A valid registration number will remove the “Demo” restrictions placed on your system (there are a maximum of 20 diary entries and no beaming or printing privileges!).
- Change your password weekly.
- Backup your system daily by synchronizing with your desktop system.
- The capacity of the Demo System Capacity is 20 Diary Entries. You must register your system, to add more Diary entries.
- To review your last Encounter with your health care provider, Tap 'My Encounters'
- To review your current diagnosis list, Tap on 'My Diagnosis'
- To review your current treatment program, Tap on 'My Treatment'
- To enter data into a questionnaire supplied by your physician or on the NoteGen Website, Tap 'My Questionnaire'

- To enter data into a diary, Tap 'My Diary'
- See 'Color Coding' to review conventions.

My Encounters Window

You may review the text from your last encounter with your physician by tapping this button. Of course some of this may seem to be 'medical hieroglyphics', but careful reading may help you to better understand your physician's concerns regarding your health. Sample data is discussed in **Table 4** and displayed in **Figures 4**.

Table 4: The Patients Window Fields

Field	Explanation
Top 1/3	Contains the Encounter Id, Date, and Time of the Visit. In most physician notes, you will see a statement of the current problem(s), symptoms, or some details of your complaints (i.e., medical symptoms)..
Middle 1/3	Contains the Physical examination findings
Bottom 1/3	Contains the Physician's assessment of your status and Plan of action in terms of further evaluation, laboratory tests, consultations, and therapeutic interventions. Will also contain a summation of your Diagnosis, Other Therapy, and Medications.

:

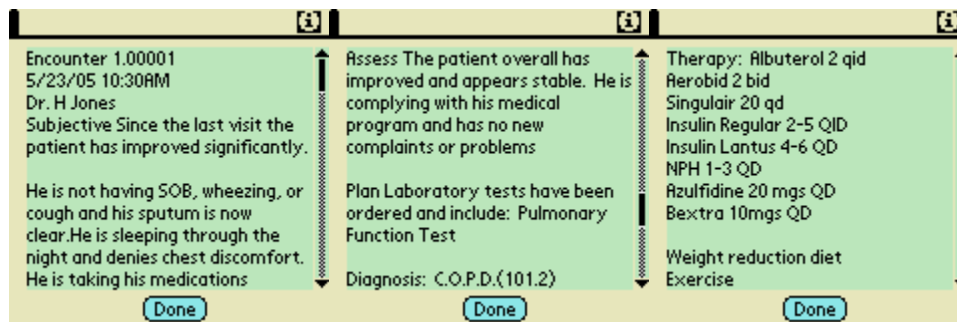


Figure 4: My Encounters Window

My Diagnosis Window

The list of your current diagnosis is displayed in the My Diagnosis window. The features of this window are listed in **Table 5** and **Figure 5**.

Table 5: My Diagnosis Window Structure

Section	Function
Top	Patient Id and Name
Diagnosis List	Patient's Diagnosis List. The format of the diagnosis is the diagnosis description followed by the Diagnosis Code in parentheses. The Diagnosis Code follows the guidelines presented in the International Classification of Disease (thus these codes are called ICD codes).

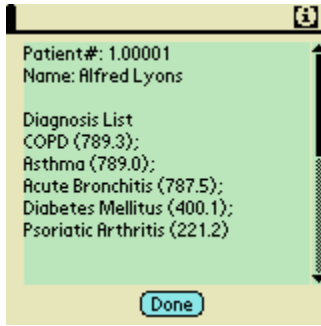


Figure 5: My Diagnosis Window

My Treatment Window

The list of your current treatment program items is displayed in the **My Treatment Window**. The features of this window are listed in **Table 6** and displayed in **Figure 6**.

Table 6: The Encounter Window

Section	Function
Top	Patient Id and Name
Treatment Program	The treatment program consists of medications and other therapies. The Latin abbreviations have been converted to English language equivalents. This schedule should be checked very carefully with the instructions provided by your physician and pharmacist and any inconsistencies should be brought to your physician's attention immediately!

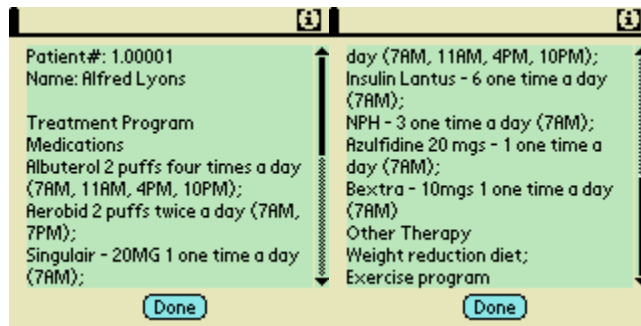


Figure 6: My Treatment Window

My Questionnaires Window

A Questionnaire is generally a type of Patient-Based Assessment (or **PBA**). You may complete one or more Questionnaires supplied by your Health Care Provider in this Window. A Questionnaire may collect data about your General Health, your treatment program, or specific areas (such as the one included in the slides, the “SF36”, a questionnaire designed by the Rand Corporation and JE Ware to collect data regarding psychological health. The features of a Questionnaire are listed in **Table 7** and displayed in **Figure 7**.

Table 7: My Questionnaires Window

Section	Function
Opening Statement	The first screen in the Questionnaire displays the purpose and instructions to complete the subsequent questions. When you have read these, Tap the Next Button.
Questions 1 - X	<p>A series of questions may be posed to you. Each question will be associated with either a list of responses or some other tool to answer the question appropriately. There are at least 10 different types of questions that may be posed.</p> <p>Each question that is posed may be dependant on your demographics, chart components (such as medications, diagnosis, and other therapies) as well as your previousl responses to questions.</p> <p>Please answer each question carefully!</p>
Ending Question or Statement	You have answered the last question when you see the “Next” replace with a “Save”. If you would like to save the Questionnaire at any time, Tap the Save button from the Menu List.

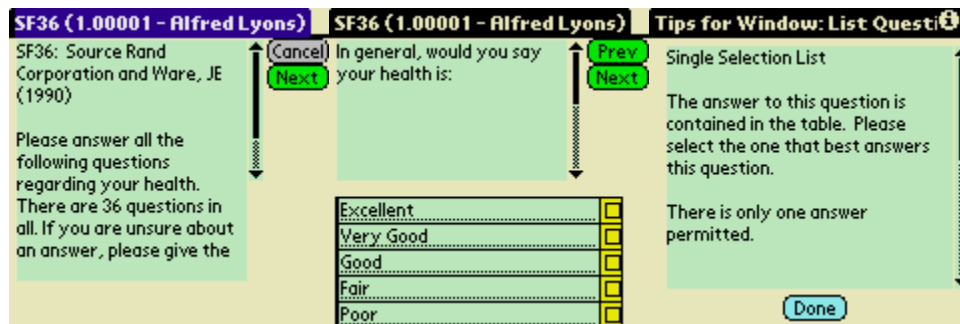


Figure 7: My Questionnaire Window

Several options are available in the **Questionnaires Window**. They may be accessed by tapping the **Menu Bar** (i.e., the Menu). Options are listed in **Table 8** and displayed in **Figure 8**. (**Note that these features are not available in the Demo System**).

Table 8: Questionnaires Window: Menu Options

Menu Option	Function
Save	You may save the PBA and your responses, even if you have not completed it by Tapping this option. You may return to it at any time and finish it.
View	You may may the responses that you have entered by Tapping this button.
Cancel.	Cancel PBA data entry. Data will NOT be saved.
View PBA Input Data	View Questions and Input Data for this Questionnaire
View PBA Components	A Questionnaire may consist of multiple component Questionnaires. For example, if you were to answer a question: Have you ever smoked, you may be forwarded to the Smoking Questionnaire which is actually a component questionnaire!
Help Tips	There are many types of Questions that might be posed in a Questionnaire. The Window Tips may provide additional information on the type of question and the type of response required.

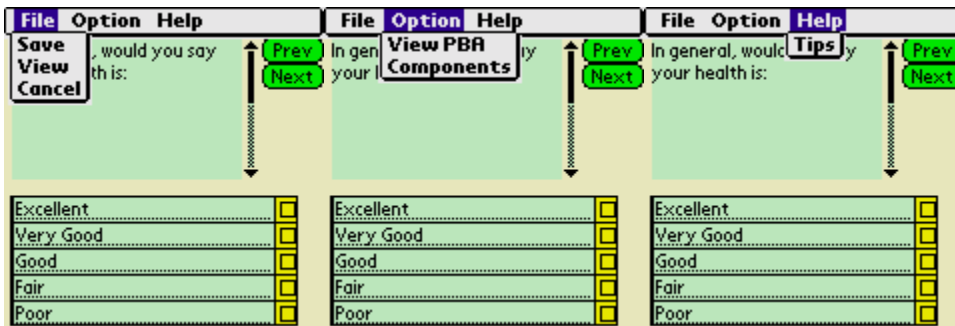


Figure 8: The Field Window displaying Subjective Field

Tips for the Questionnaires Window:

My Diaries Window

You may record compliance with and response to your Treatment program in this Window. Moreover, you may obtain detailed information on each item in your treatment program. This program may be beamed to you by your physician or you may enter it from scratch using a menu option. . The features of the My Diary Window are listed in **Table 9** and displayed in **Figure 9**.



Figure 9: The My Diary Window

Table 9: The My Diary Window

Field	Explanation
Date/Time	<p>These fields are automatically loaded and represent the current date and time for which you are entering data. If you would like to enter a custom date or time because you were unable to do so at that moment, Tap on the Date or Time Label Buttons and select the current one from the Calendar or Date tool that will be displayed.</p> <p>Note that after you after you save that date, the date will be reset to the current one.</p> <p>Please be aware that the date and time are automatically reset every 5 minutes. If you desire to customize either the date or time, you must do so quickly.</p>
Meds	<p>This is a list of the current treatment items. Note that some treatment items may represent a group of medications that are commonly taken together or are variants of each other. For example, Meter Dose Inhalers and Insulins. When these are highlighted, the component members are listed in the list box below.</p>
Med Type (Insulins)	<p>In the example displayed, Insulin represents a group of medications. These are listed in this box as Lantus, Regular, and NPH</p>

Med Units (Units of Insulin)	This is the dose amount of the current listed Medication. It is customized to each Medication Listed.
Monitor (Glucose)	Glucose is a measure that is done at the same time, insulin is administered. A monitor may be any numeric measure such as Glucose level, pain level, or Peakflow.
Last	
History	current medication. It is listed from the most recent to the most distant!
Save	When you tap the Save Button, you will save Medication data for the highlighted Item, including any dose or monitor data.

History Window

You may view the Treatment History for items listed in the window. When you enter this window, the Treatment item display is the current one that is highlighted in the My Diary Window. You may view all Treatment items by tapping the “All” button. You may delete any one of the historical entries by tapping on the red remove button in the history window. Treatment items are listed in reverse chronological order (i.e., from the most recent to the last recorded). If you have entered data out of sequence, the dates will be out of sequence. If you wish to review the Treatment History by Date, Tap on the Date Button.

The features in the History Window are discussed in **Table 10** and displayed in **Figures 10**.

Table 10: History Window

Field	Explanation
History Table	The historical list of all treatments taken. Scroll down to view previous treatments.
Sort by Date or by Sequence	Upon entry, treatments are listed by order of entry (i.e., By Sequence). Tap Date to view a date sorted list of transactions.
Delete	Delete a transaction listed in the history table.
View All	Upon entry into the history window, the Medication History is for the currently highlighted medication in the My Diary Window. You may view all medications that you entered into the My Diary Window by Tapping this button.
Done	Tap and exit window

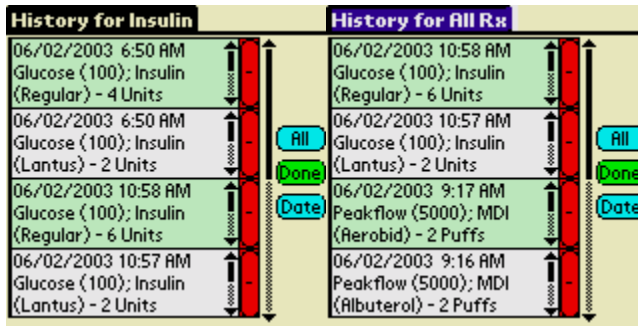


Figure 10: History for Insulin and For All Therapy

Registration

To register *MyNoteGen™* after purchasing a license, the "Palm user name", also known as the "HotSync name", of the handheld unit on which the software is installed is required to generate a registration code.

To get the user name, tap on the HotSync application. In a Palm III or later, the user name appears in the extreme upper-right of the HotSync screen as shown in **Figure 11**.

Be sure you supply the name EXACTLY as it appears, including upper or lower case letters, punctuation, and spaces as appropriate. Any difference will make the registration code invalid.

After you receive your registration code and serial number, type them into the registration form shown in **Figure 12** and tap the Register button.

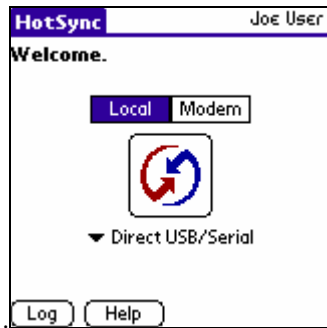


Figure 11: Hot Sync Name



Figure 12: Registration Window

Customizing MyNoteGen®

You may customize some features in MyNoteGen®. Most of the Customization in My NoteGen will occur in the Main Window

Customizing Password

Change Password:

Goal: To improve the security of your PDA and prevent accidental or conscious access by others. Note: we strongly recommend the acquisition of a power on security system that prevents access to your PDA in the event that you lose it!

Change Password

Enter old password:

Enter new password:

Figure 13: Change Password

Steps:

1. Enter the old password
2. Enter the new password (must be at least 5 characters, alpha or numeric).
3. Tap the “Done” button.

Customizing My Diaries

Goal: Permits a user to enter new medications and delete discontinued medications

Options Configure Help

My Rx

MY ENCOUNTERS
MY DIAGNOSIS
MY TREATMENT
MY QUESTIONNAIRES
MY DIARY

Treatment	Type	Monitor	
Lantus	Insulin	Glucose	<input type="checkbox"/>
Regular	Insulin	Glucose	<input type="checkbox"/>
NPH	Insulin	Glucose	<input type="checkbox"/>
Azulfidine	NA	Pain	<input type="checkbox"/>
Bextra	NA	Pain	<input type="checkbox"/>
Albuterol	MDI	Peakflow	<input type="checkbox"/>
Aerobid	MDI	Peakflow	<input type="checkbox"/>

Rx Detail for Lantus

Treatment Lantus

Type Monitor

Dose

Rx#	1
Start Value	0
Increment	1
No Values	25
Default List#	2
Label	Units

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Figure 14: Customize My Diaries Window

Features:

- Access the My Diaries Customization Window from the Main Menu as displayed in Figure 14.
- The complete treatment program is displayed in the Configure My Treatment Window.
- Delete any unwanted Treatment Items by Tapping the Red column in the correct row
- To view and modify the detail data for each item, tap that Line. You may change the type, dosing schedule, and monitor used with this Treatment Item.

Customize Monitor

You may modify or create a scale to measure any index used in monitor the response to a treatment item. This is called a “Monitor”. For example, the “Edema” Monitor is displayed in Figure 14. You may change the numerical measurements, label, and default in this window.

Monitor Detail For Glucose

Monitor ↑
 ↓

Name	Edema
Start Value	0
Increment	1
No Values	5
Default List#	0
Label	Edema

Figure 15: Customize Edema Monitor

Customize Type

A “Type” is a generic category of medications that are generally administered at the same time in the same way and are thus, logically grouped. For example you might type all Insulins or all Metered Dose Inhalers (MDI). The Type Window is displayed in Figure 16. You may delete a type by tapping on the list of current Types.

Add Rx Type

Add Type

Type
 ↓

Figure 16: The Type Window

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