ClinicTracker Conventions

Methods for Data Entry

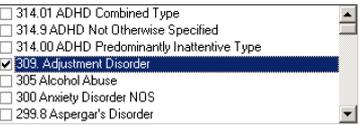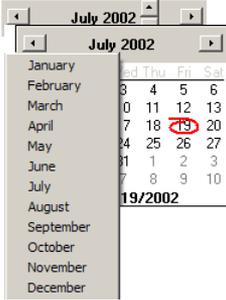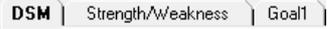| Image	Description
	Text Box: Enter text using the keyboard. You will sometimes encounter a limit on the number or type of characters you can enter.*
	Drop-Down: Click on the down arrow to display a list of options. Select from the list using the keyboard or mouse. You can navigate to an item starting with a given letter by pressing that letter on your keyboard. **
Comprehensive ⦿ Update	**Option Button:** Choose one of the options by clicking the button or the label next to it.
Sensitive Information	**Check Box:** Check or uncheck the option(s) by clicking on the box or the label next to it.
314.01 ADHD Combined Type / 314.9 ADHD Not Otherwise Specified / 314.00 ADHD Predominantly Inattentive Type / 309. Adjustment Disorder / 305 Alcohol Abuse / 300 Anxiety Disorder NOS / 299.8 Aspergar's Disorder	**Check List:** Select as many items from the list as you wish by clicking on the checkboxes. Often, you can right-click to select/deselect all.

Image	Description
7 /19/2002	**Date Picker:** If you don't want to enter a date, uncheck the box on the left. Otherwise, enter dates using the keyboard or by clicking the down arrow to display a month view.
July 2002 calendar / Today: 7/19/2002 / July 2002 month list (January–December)	**Month View:** A calendar that highlights today's date in red. Select a date by clicking on it. Clicking on the year on the top of the calendar will display an up and down arrow that changes the year in either direction. Clicking once on the month on the top of the calendar will display a list of months you can select. Clicking the red circle at the bottom will automatically select today's date.
DSM Strength/Weakness Goal1	**Tab Control:** Some forms have many tabs used to organize information. You can move freely from tab to tab within the same record.

*From nearly all text boxes throughout the system, pressing F2 will access the Common Phrases feature (details on page 3).
**Pressing F2 from any of the drop-down menus throughout the system will display the F2 Search screen (details on page 3).

Image	Description	Image	Description
	List View Control: Many forms use a List View control to display record history. Double-click a row to load the details of the previous record for viewing or editing. You can typically sort the table by a specific column by clicking on the column header.		**Efficiency Mode:** When this feature is enabled, the My Messages widget, Message Board, and Patient Contacts Treatment History will display only the most recent page of records.

The left/right arrow icon will enable/disable Efficiency Mode.

The single down arrow will display another page of data.

The double downward arrow will display all available records.

The downward arrows only appear if additional data are available. |

Icons

Note: Place your mouse over an icon in ClinicTracker to see the description

Image	Description	Image	Description	Image	Description
	Copy/Add Similar: Create a new record with the same information as the highlighted record, but with today's date		**Find:** Access the Find Form to locate a patient or staff member		**Save and New:** Save current record and then clear it
	Print: Displays print options (Preview, Print or Export to Word)		**Date Selector:** Review rating scale data collected by Testing Wizard (only displayed if Testing Wizard is enabled)		**Delete:** Delete the current record
	New: Creates a new record in the current form (clears the existing record)		**Save:** Save current record		**Medication:** Accesses the Medication listing or form

Image	Description	Image	Description	Image	Description
	Psychotherapy Notes: Preview, print, or export Psychotherapy Notes		**Strikethrough Text:** Strike through for editing text		**Paperwork Notification:** Send a Paperwork Notification to a staff associated with a record. The message will be sent using the format (ClinicTracker Message or email) the recipient has requested in his/her Staff Info Record
	Vital Tracking: Brings up a form to enter height, weight, blood pressure, and other vital signs		**Spell Check:** Spell checks the entire record. If text is highlighted, spell checks only the current selection		
	Red Text: Red text is used to edit and mark text under review (also accessible through Shift +F1)		**Bullet:** Insert a bullet at current position		

Conventions

- When you open most data entry modules, you will be prompted to select a specific patient. If you cancel out of this dialog box, the controls on the form will be 'frozen.' You will not be able to enter data until you go to File->Find (or press Ctrl + F) and select a patient.

- The system will not allow you to save records until you have entered data in all required fields (the ones with bolded red text). Once you enter the required information, the field label will turn to bold black text. You can then save by clicking the Save icon, going to File -> Save, or pressing Control + S.

- If you try to close out of a record without first saving your work, the system will display a prompt to avoid losing your unsaved changes.

- Don't go too long without saving the data you've entered. You never know when a computer might malfunction. The more often you back up your work, the better.

- When you see a button with a letter underlined, you can access that button by pressing ctrl and the underlined letter. For example, if you see a button that says 'Save,' you can save your work by pressing ctrl and S.

- A *Navigation* menu item appears on the toolbar of all the data entry forms. It offers a convenient way to switch to a different form without having to re-identify the patient. For example, if you are working on Jimmy's record in the *Compliance Module*, use the *Navigation Menu* to move to *Patient Contacts*. Jimmy's contact information will load automatically.

- From nearly all text boxes throughout the system, pressing F2 will access the Common Phrases feature. It allows you to select and input commonly used phrases from either the Global Common Phrases list or your Personal Common Phrases list. You can edit your Personal Common Phrases list directly via this interface, while an administrator can configure the Global Common Phrase list via the Maintenance Menu.

- Pressing F2 from any of the drop-down menus throughout the system will display the F2 Search screen. It lets you search through the dropdown list.