

## Personal Health Record Management System for U3 USB Smart Drive

# CALPHR[USB]<sup>TM</sup>

User Guide

Personal Health Record Management System for U3 USB Smart Drive

## CALPHR[USB]<sup>TM</sup> User Guide (1.0)



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## 2. Introduction

I hank you, for your interest in our U3 USB Smart Drive based personal health record management system. CALPHR[USB]™ is a product for U3 devices that will enable the user to keep track of self and their family member's complete personal health record.

The purpose of this software / tool is to act as a complete day to day personal health information manager. This tool will alert the user of any medications, appointments and prescription refills and assist the user in monitoring their day to day health issues for chronic diseases or any healthcare issues.

CALPHR[USB]™ is seen as an useful tool to monitor personal healthy living lifestyle allowing access to information anywhere and anytime. It also manages contact details and appointment alerts for GPs, Pharmacy, Hospitals, clinics or or any other preferred contact reminding you of any appointments or repeat prescription ordering from a preferred Pharmacy.

**CALPHR[USB]™** – a personal health record system – in U3 USB Smart Drive.

#### Modules include:

- ➤ Monitoring of healthy living BP, Blood sugar, Calorie Intake, BMI, at risk scores
- Vision
- Prescription,
- > Allergies,
- Chronic disease monitoring
- ➤ Notification & Alerts- medication collection, doctors' appointments to more complicated issues like exceeding limits in input values of BP or blood sugar level values are taken from the medical standards body.
- ➤ User friendly and intuitive modules to record different health aspects.
- ➤ Easy Navigation to different modules and data input.
- Software was developed from the electronic clinical records management expertise which is currently used in the Child Health



project, Public Health project, and currently promoting here in the UK in hospitals and NHS Trusts.

- ➤ Record of Demographic information Personal, Clinicians (GPs/Consultant/Optician), Chemists etc.
- > Allows single or multiple records keeping.



## 3. OVERVIEW of Data Collection and Management

Please Read This Section before Using the **CALPHR[USB]™** application

The Chapter intends to give you an overall view of the Modules available on this beta version of personal health record management application and guides you through some general rule and tips for easier navigation. We hope this guide to be enjoyable and informative for your use.

This PHR version features the basic Modules to help you maintain a healthy lifestyle and to record essential health data for several chronic disease monitoring. You could securely store health records of a number of individuals/family members as desired.

#### This Chapter covers:

- Brief overview of the individual Modules,
- Some general information and instructions and

#### Modules Overview:

- 1. <u>Health Module</u>: records and monitors the health issues such as : Heart rate, Respiratory rate, Temperature, Blood Pressure, Blood Sugar, Cholesterol, Triglyceride and other Lab Values. Several repeated records have graphical views to assist monitoring the trend.
- 2. <u>Notification Module</u>: assists in setting medication reminders or appointments. Multiple contacts of healthcare professionals or chemists could be stored for individual member.
- 3. <u>Allergy Module</u>: details of allergy suffered by the individual member.
- 4. <u>Vision Module:</u> detailed Optician's script record.



- 5. <u>Fitness Module:</u> automated information on BMI & Calorie requirements for diet plan of target dates and standard clinical advice on personal weight loss programme.
- 6. <u>Administration</u>: controls all administrative and basic data collection for the individual member. You **Must** navigate the Administration Module first to enter the Members' name details you wish to add to your PHR. Further details could be added as convenient OR when dealing with the respective Modules.

Please visit <a href="www.cal2cal.com">www.cal2cal.com</a> to check for updates and enhanced version of this tool.

Please use our FEEDBACK screen to send us your feedback of this novel tool.

#### Some Basic Instructions

Your PHR application is flexible enough to add or alter information including user name and password as desired. You have the capability of confidential data management and backup the information for further security.

Follow the Registration and Log-In from the Guide chapters and carry on inputting the various data at will.

### 3.1 How to navigate between Screens:

Navigation between the screens is allowed at any time. However, remember to SAVE the data before you go to another screen.

From some Modules/Sub Modules you are allowed to add new items (contacts, medication, allergy type etc). These items are saved for future use.



#### 3.2 How to Select a Member

- 1. From the Home page click on the member you wish to Select from the drop down list.
- 2. From the TODAY page Members names with alerts if any are listed. One TAP on the Alert opens the Alert details and TAP & HOLD on a Member name opens a drop down of Modules allocated for this member when added in the Administrative Section.
- 3. The selected Member's name is shown on the header of all the Modules navigated until you select another member OR EXIT from the application.

#### 3.3 How to Select a Module / Sub Module

1. From the Home page click on the member you wish to EDIT and then TAP on the required MODULE.



## 4. How to use this Manual

This manual aims to provide a step by step guidance for the use of  $CALPHR[USB]^{TM}$ .

Print the manual and keep it as a ready reference if you need to refer to it during your initial interaction with the application.

The Manual guides you through the Modules and Sub-Modules explaining how to get the best out of your PHR tool.



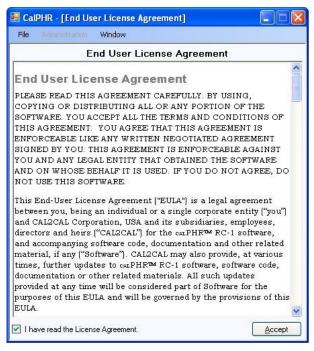
## 5. User Registration

When you execute the application for the first time, Welcome Screen opens.



Enter into the application.

Disclaimer of this application will be shown to you. Accept the disclaimer. The application will generate a message to set the log in details to execute the



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application for the first time.

Choose "Yes" to set the user id and password or choose "No" to ignore.

If "Yes" option is chosen, the Registration form will be opened.

Set user id and password in User Id and Password fields'. Confirm the password. Also put the additional security question and answer field. Click



"Ok" button. User id and Password is set.



## 6. Log In Screen

Log In screen opens only if you have set user id and password at the time of registration or by visiting preference settings section explained later in this user guide.



The description of the input fields is given below:

User Id: Enter the user id.

Password: Enter the password.

Remember User Id: To remember user id, check the check box and click ["Ok"] button. Next time when the user id needs to be provided, the application retrieves the whole user id and populate into the User Id field if the first character of the entered string matches with the user id.

Remember User Id and Password: To remember user id and password you can check the check box and enter the ["Ok"] button. Next time when you enter the user id, the application will retrieve the whole user id, password and populate into the User Id, Password fields respectively if the first character of the entered string matches with the user id.



## 7. Home

The HOME page features a List with the members details saved in the system and shows all the Modules available in the present PHR application.

It provides member specific modules representation, Edit and deletes member details facilities

## 8. Administration

This module provides the options to control the application. TAP on any one of the sub modules to navigate.



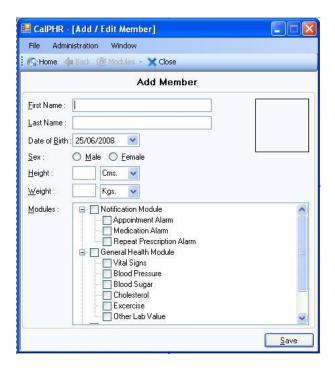
#### 8.1 Add New Member

Go to [Administration->Add New Member] in the menu item.

First Name: Enter the first name of the member.

Last Name: Enter the last name of the member.

Date of Birth: Select the exact date of birth of the member from the date time picker.



Age: It is an auto calculated field with respect to the date of birth field.

Sex: Select the sex of the member.

Height: Enter the height of the member.

Weight: Enter the weight of the member.

To add a picture, right click on the picture box on the right most corner of the form. Click on the "Add" menu item and brows the picture against the member.

Check the modules and sub modules for which you want to give the access permissions to that member.

Click ["Save"] button and the member are enlisted into the application.



#### 8.2 Edit/Delete Member

TAP ["Edit/Delete Member"] menu item in "Administration" Page to open the Member Information page.

All the members saved in the system are listed with appropriate icons and



short details.

Click on button with [ icon against any member to view his/her details.

A form with the detailed information of the member opens up. Edit the fields.

Click on ["Save"] button to save the changes.

To Delete the member click on the button with  $[\stackrel{\blacktriangleright}{\blacktriangleright}]$  icon. The Application generates a confirmation message to ensure the deletion of the member.

TAP "Yes" to delete the member. The member will be deleted from the application along with all records.

If done in error TAP 'NO' button.



#### 8.3 Demographics

To open the Demographics module, go to [Administration→ Demographics] menu item of the main menu.

Demographics module holds the address information of the enlisted members.



Street Address: Enter the details of the street address of the record.

City: Enter the name of the City of the address record.

Country: Enter the name of the country.

Ph(R): Enter the phone number of the residence of the address record.

Ph(W): Enter the Work phone number.

Fax: Enter the Fax number.

Zip: Enter the Zip code.

Email: Enter the email address with valid format.



#### 8.4 Application Management

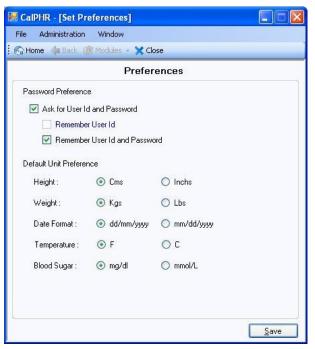
To enter into the Application Management module, go to [Administration  $\rightarrow$  Application Management] from the main menu. The Application Management module consists of two sub menus. They are

- 1. Set Preference
- 2. Change User ID and Password

#### 8.4.1 Setting the Preferences

In this sub module you can set your preferred settings to control the application.

Password Preference: You can set the password protection settings by



choosing the options.

Default Unit Preference: You can set the default preferred units that will be used throughout the application by choosing the different radio button options.

Save button: By clicking this button you can save the desired preferences into the database.



#### 8.4.2 Change Password

To open this sub module, go to [Administration  $\rightarrow$  Application Management  $\rightarrow$  Change User ID/Password].

Enter the correct old password in the old password field.

Enter the new User Id and password.

Confirm the new password.

Click Ok button to set the new user id and password.

Click Cancel button to ignore the changes.





#### 8.5 Contacts

To record different contact information, go to [Administration → Contacts] menu.

It provides 3 sub menus.

- > General Contact Details
- Pharmacy Details
- Hospital Details

#### 8.5.1 General Contact Details

Demographic details of different contacts can be stored in this sub module -



Doctor/Nurse/Optician/Healthcare Trainer/Physiotherapist etc.



Click on the ["New"] button to add a new record.

Complete the appropriate fields and click on ["Save"] to save the record.

To delete a record from this module, select a record from the data grid and click on the ["Delete"] button. The record will be deleted.

#### 8.5.2 Pharmacy Information

Multiple Pharmacy or Clinic details could be stored in your PHR system.



TAP on ["New"] button to add a new contact details.

Complete the appropriate fields and click on ["Save"] to save the new record. The new record will be reflected on the data grid.

To delete record, select the record from the list and click on the ["Delete"] button. The record will be deleted.



#### 8.5.3 Hospital Information

Multiple Hospital details could be stored in this sub module.

Click on ["New"] button to add a new contact details.



Complete the appropriate fields and save it.



### 9 Modules

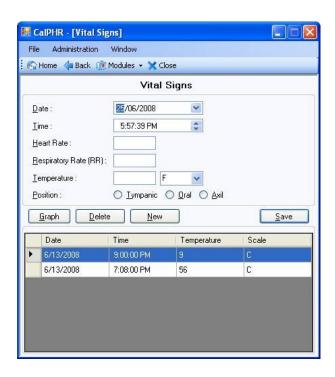
#### 9.1 Health Module

Health module is divided into six sub modules.

- Vital Signs
- Blood Pressure
- Blood Sugar
- Cholesterol
- Exercise
- Other Lab Values

#### 9.1.1 Vital Signs

This sub module holds the different vital signs information for the selected member.





Date: Select the date of the record.

Time: Select the time of the record.

Heart Rate: Enter the reading of the heart rate of the member.

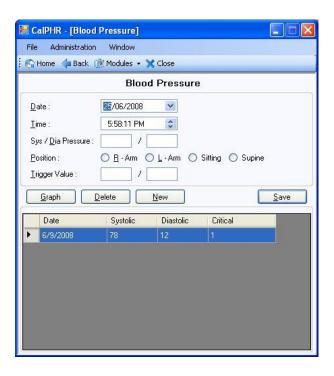
Respiratory Rate: Enter the reading of the respiratory rate of the member.

Temperature: Enter the body temperature of the member with respect to the selected scale of the combo box properly.

Position: Select the position of the body where the temperature has been taken.

#### 9.1.2 Blood Pressure

This sub module holds the record of blood pressure readings taken with respect to different date and time.



Date of Blood Pressure: Select the date of the blood pressure reading.

Time of Blood Pressure: Select the time of the blood pressure reading.



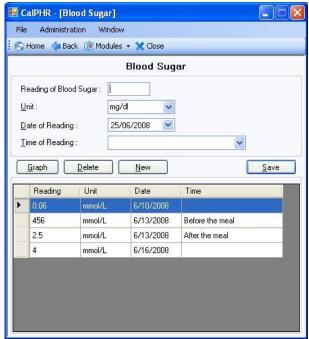
Sys/Dia Pressure: Enter the reading of the systolic and diastolic pressure of the selected member.

Position: Select the position of the body where BP reading is taken.

Trigger Value: Set the trigger values. By default the trigger values for systolic and diastolic pressure are 120 and 80 respectively.

#### 9.1.3 Blood Sugar

This sub module holds the record of the blood sugar reading of the selected member.



Reading of the Blood Sugar: Enter the blood sugar reading in this field.

Unit: Select the unit of the reading. The application will follow the default unit settings set at the preferences area.

Date of Reading: Select the date of reading.

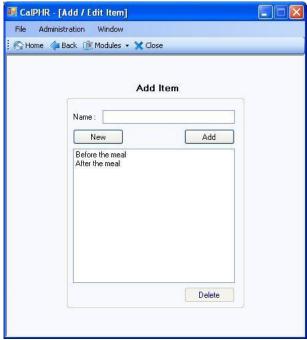
Time of Reading: Select the specific time or event when the reading has been taken.

To enter new "Time of Reading" type or edit the existing "Time of Reading" types select "...New" item from the "Time of Reading" combo box.

A new form, named "Items" will open.



To enter a new Item, click on the ["New"] button. Specify the new item into



the text box. Click on the ["Save"] button to save the item in the list.

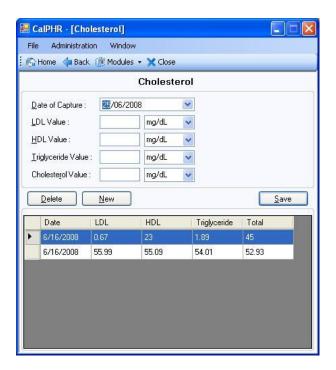
To edit an item, select the item from the list box. The textbox will be populated with selected item. Edit the item and click on the ["Save"] button to save the item.

To delete an item, select the item from the list box. Click on the ["Delete"] button. The application will search whether there is any reference on this item or not. If the selected item doesn't have any reference, the item will be deleted from the list.



#### 9.1.4 Cholesterol

By default a summary page opens showing the past saved records for this



member.

To add a new record, click on ["New"] button.

Complete the respective fields.

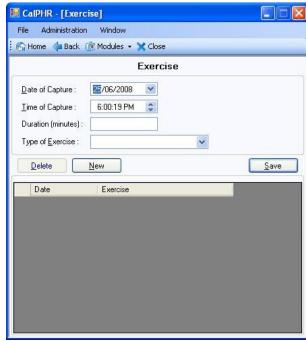
Click on ["Save"].

By default the preference unit settings will be shown. The application will internally convert the values into the preferred unit and save it if other unit values are used.



#### 9.1.5 Exercise

This sub module holds the record of different exercises of the member with respect to date and time.



Click on ["New"] to enter a new event.

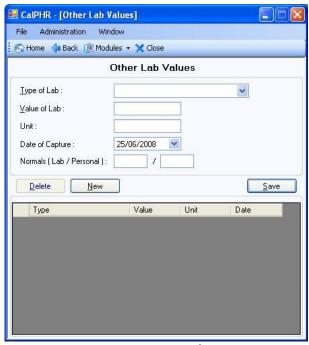
Complete the appropriate fields and click on the ["Save"] button.

To enter new exercise type or edit the existing exercise types select "...New" item from the "Type of Exercise" combo box.



#### 9.1.6 Other Lab Values

This sub module holds the different lab test values of the selected member. At the first page, it will show the summery of the past records.



Click on ["New"] button to enter a new record.

Complete the appropriate fields and Click on the ["Save"] button.

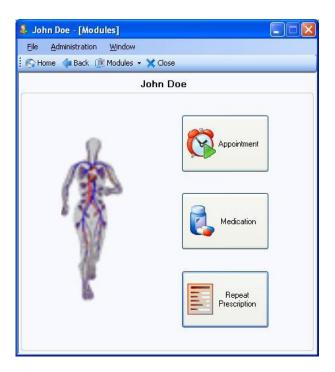
To enter new exercise type or edit the existing Lab types select "...New" item from the "Type of Lab" combo box.



#### 9.2 Notification Module

Notification module is sub divided into three sub modules.

- > Appointment Module
- Medication Module
- Prescription Re-fill Module

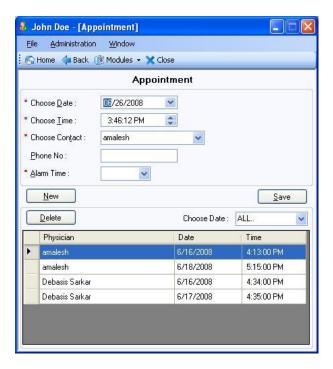


#### 9.2.1 Appointment

This sub module holds the different appointment information with physicians or any other contacts. You can set alarms against each appointment record to remind you the appointment.



Select date from the "Choose Date" list to view the list of appointments on that selected date.



To set a new appointment record, click the ["New"] button. Fill the mandatory fields and click on the ["Save"] button. The record will be saved.

To edit an appointment record, select the appointment in the grid view. The details of that record will be populated on the controls. Edit the fields and click on the ["Save"] button. The record will be saved.

To delete an appointment record, select the appointment in the grid view and click on the ["Delete"] button.

#### 9.2.1.1 Creation of a new record in Appointment sub module

- 1. TAP on ["New"] button.
- 2. Complete the appropriate fields. All saved contacts from the Administration Module will be available.
- 3. If you want to create a new contact record select the "...New" option of the "Choose Contacts" combo box.
- 4. Follow the instructions and Save the data.



- 5. If you want set user defined alarm time, select the "...NEW" option of the "Alarm Time" combo box.
- 6. Click on the ["Save"] button to save the record along with its reminder.
- 7. The record will be saved and the u3 device will evolve notification alert against the appointment according to the settings of the appointment.

#### 9.2.1.2 Edit records in Appointment sub module

- 1. Select a record in the grid, which you want to edit.
- 2. Edit the values on the fields.
- 3. Click on the ["Save"] button to save the data and the record will be modified.

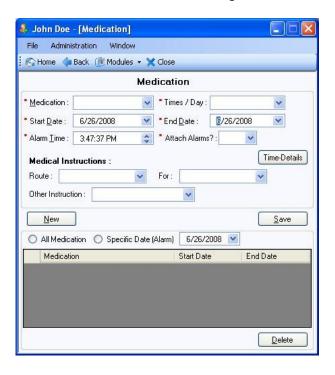
### 9.2.1.3 Delete records from Appointment sub module

- 1. TAP on the desired row of the appointment grid and
- 2. TAP the ["Delete"] button.
- 3. A confirmtion message box comes up.
- 4. TAP "Yes" to delete or "No" to cancel the action. All the attributes along with the reminder record will be deleted from the system when you choose to delete.



#### 9.2.2 Medication

In this module, you can set notification against each medication record to remind you about the different time of taking medication of that member.



Select "All Medication" radio button, to view all the medication record into the tabular view.

You have the option of viewing the medication records of a particular date. Select the "Specific Date" radio button and select the date from the date time picker.

#### 9.2.2.1 Creation of a new record in Medication sub module

- 1. Click on ["New"] button.
- 2. Complete the fields in the new "Medication" page.
- 3. Select a medication from the "Medication" combo box.
- 4. If you want to create a new medication name, select the "...NEW" option of the "Medication" combo box.
- 5. Complete the desired fields.
- 6. Select the additional instruction in the "Other Instruction" combo box.



- 7. Click on the ["Save"] button to save the new medication record.
- 8. If you add a new medication record, the system will find that whether this member is presently having the selected medication or not. If it is not found, the entry will be a new entry. Otherwise the existing record will be modified.

#### 9.2.2.2 Edit records in Medication sub module

- 1. Select a record in the grid, which you want to edit.
- 2. "Medication Edit" page will open with the details of the selected medication.
- 3. If you change the medication field, that will be a new medication entry into the sub module as medication name is the prime factor of every record. To edit an existing record, edit the values of the fields other than medication field.
- 4. Click on the ["Save"] button to save the changes of the record along with its Alerts.

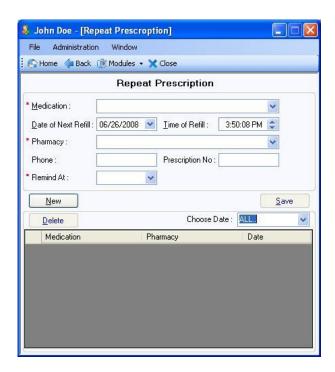
#### 9.2.2.3 Delete records from Medication sub module

- 1. Select the desired row from the appointment grid.
- 2. TAP the ["Delete"] button.
- 3. A message box will pop up to confirm the action.
- 4. TAP the "Yes" button to delete the record or "No" to cancel the action. All the attributes along with the reminder record will be deleted from the system if deleted.



## 9.2.3 Prescription

This sub module holds the different prescription information with different pharmacies.



Select date from the "Choose Date" list to view the list of appointments on that selected date.

To set a new prescription record, click the ["New"] button.

To edit a prescription record, select the prescription in the grid view and click the ["Edit"] button.

To delete a prescription record, select the prescription in the grid view and click the ["Delete"] button.



## 9.3 Allergy Module

This module holds all the allergy related records (Name, Type, Reactivity etc)



of the selected member.

The summery screen shows the short overview of previously taken record.

Click on the ["New"] button to add a new record.

Fill up the fields

Select a record of the list of the summery screen to edit the record.

The Allergy module will open

Type of Allergy: Select the allergy type from the combo box.

Enter the specific name of the allergy into the "Name/Type of" filed.

Date: Select the date of that record.

Reactivity: Enter the reactivity or specific side effect of the allergy.

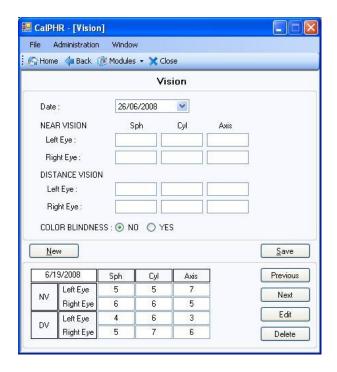


#### 9.4 Vision Module

This module holds all the vision related records of the selected member.

If the selected member has the access permission of "Vision Module", the icon will be in the activated mood.

Click the icon to enter into the "Vision Module" with respect to the selected member.



The Vision module will open. It will show a short view of the last taken record. By clicking the ["Previous"] and ["Next"] icons, you can view the records of that selected member according to the index of the records.

Date: Select the date of taking the record.

#### Near Vision:

Left Eye Spherical Power: Enter the Spherical Power of the right eye in this field.

Left Eye Cylindrical power: Enter the left eye cylindrical power in this field.

Left Eye Axis: Enter the Left eye Axis value in this field.



Right Eye Spherical Power: Enter the Spherical Power of the right eye in this field.

Right Eye Cylindrical power: Enter the left eye cylindrical power in this field.

Right Eye Axis: Enter the Left eye Axis value in this field.

#### Distance Vision:

Left Eye Spherical Power: Enter the Spherical Power of the right eye in this field.

Left Eye Cylindrical power: Enter the left eye cylindrical power in this field.

Left Eye Axis: Enter the Left eye Axis value in this field.

Right Eye Spherical Power: Enter the Spherical Power of the right eye in this field.

Right Eye Cylindrical power: Enter the left eye cylindrical power in this field.

Right Eye Axis: Enter the Left eye Axis value in this field.

Color Blindness: Select the option according to the status of the color blindness.



#### 9.5 Fitness Module

This module holds the fitness related information of the selected member.

Select a member from "Home" module and click on the ["Module"] button.

If the selected member has the access permission of "Fitness Module", the Fitness module will be in the activated mood.

Click the ["Fitness"] button to enter into the "Fitness Module" with respect to the member.



The home page of the Fitness module will open.

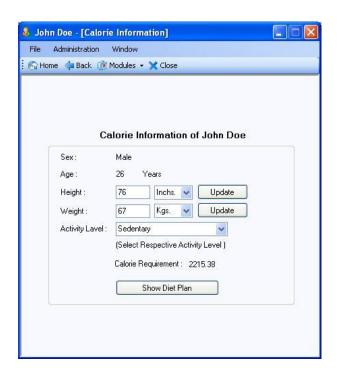
#### 9.5.1 Calorie Information

This sub module retrieves the particulars of the selected member. It calculates the calorie requirement considering the height, weight and sex and activity level. You can view the calculated calorie requirement. Also it provides the diet plan to maintain the ideal weight of the selected member.

Sex: This field holds the sex of the selected member.

Age: This field holds the age of the selected member.





Height: By default this field holds the height of the selected member. But this field is editable. You can enter different value in this field to view the calorie requirement and respective diet plan. By clicking the Update link label, you can modify the Height of the selected member.

Weight: By default this field holds the weight of the selected member. But this field is editable. You can enter different value in this field to view the calorie requirement and respective diet plan. By clicking the Update link label, you can modify the Weight of the selected member.

Activity Level: You can select different activity level to view the respective calorie requirement. By clicking the Update link label, you can modify the Weight of the selected member.

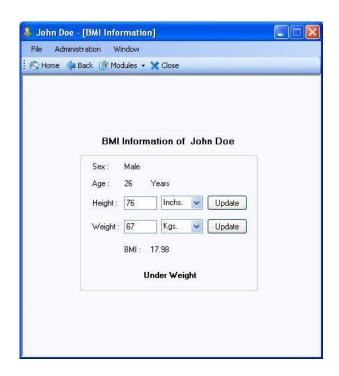
Show Diet Plan: Click the button to view the diet plan for the member.

This application will calculate the ideal weight of the member considering the present status of the selected member's particulars.



#### 9.5.2 BMI Information

This sub module retrieves the particulars of the selected member. Calculates the BMI.



Sex: This field holds the sex of the selected member.

Age: This field holds the age of the selected member.

Height: By default this field holds the height of the selected member. But this field is editable. You can enter different value in this field to view the BMI. By clicking the Update link label, you can modify the Height of the selected member.

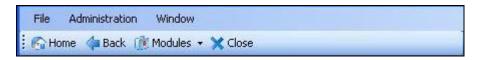
Weight: By default this field holds the weight of the selected member. But this field is editable. You can enter different value in this field to view the BMI. By clicking the Update link label, you can modify the Weight of the selected member.

You can see the calculated BMI of the selected member along with his/her weight status.



#### 9.6 Generic Menu Items

Every module provides a generic tool bar at the bottom.



Click on ["Administration"] to navigate Home, Add New member, Demographics, Contact Details, Application Management, and View Disclaimer

Click the button with [i] icon to navigate the home module directly.

Click the tool bar button with [ icon to navigate the home page of the modules or sub modules.

By clicking the tool bar drop down button with [ Modules ] icon, you can directly navigate different module and sub module.



## 10 Support

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