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GETTING STARTED

INTRODUCTION

Welcome to PatientKeeper Personal. This section contains the basic requirements necessary for running this software, how to install it onto your Palm device, how to navigate your way around the program, and how to register your copy of PatientKeeper Personal.

SYSTEM REQUIREMENTS

DEVICE REQUIREMENTS

PatientKeeper Personal will run on any device that uses the Palm Computing Platform, Palm OS version 3.0 or higher. Examples of these devices include:

- The Palm III, IIIe, IIIx
- The Palm V, Vx
- The Palm VII
- The Visor
- The Visor Deluxe
- The TRG Pro

MEMORY REQUIREMENTS

PatientKeeper Personal requires approximately 350k of free memory to be installed. Approximately 10k of memory are needed for each patient record. Popup lists and your personal medications database require additional memory.

INSTALLATION

If you have never installed software onto your Palm device before, read the excellent primer on how to download and install software, available at PDAMD.com. The installation instructions below will assume you have read this primer and understand the basics of installing software onto Palm devices.

First time users and users of PatientKeeper Personal v.2.20 and higher should follow the instructions below. Users of PatientKeeper Personal 2.12b and earlier should skip to Installation — 2.12b and Earlier, below.
Installation — First Time and 2.20 or Higher

To install PatientKeeper Personal for the first time onto your Palm-compatible device:

1. Locate the file you downloaded from the web. It is called pk_vXXX.yyy or pkXXX.yyy.

   XXXX is the version number and yyy is the type of file (for example: pk_v2214.zip, pk233.zip, or pk_v2214.sit).

2. Decompress the file

3. Activate the Install Tool on your desktop

4. If there are more than one Palm™ device users that use your desktop, you will be asked to choose which Palm™ device to install to. Choose your name, and click OK.

5. Click Add. A utility that will help you browse through your computer's files will appear.

6. Find the file, PK22.prc or PK233C.prc, that was just decompressed.

7. Click it. Then click Open.

8. The file you just chose, PK22.prc or PK233C.prc, will appear in the Install Tool window.

   PatientKeeper Personal has been installed. First time users should install the pre-written popup-lists and medications database which will make it easier to customize the application so that it meets your needs.

First Time Users and 2.21 or Later Users — Installing Pre-written popup Lists and Medications Database

To install PatientKeeper Personal's pre-written popup-lists, click Add. Look for the file called PK-ImpExpLists.pdb, and click OK.

If you are already using a PatientKeeper Personal version 2.21 or better, this will simply allow you to import lists to your personal popup-list collection. If you are a first time user of PatientKeeper Personal, this list will automatically populate your personal popup-list collection.

To install PatientKeeper Personal's pre-written personal medications database, click Add. Look for the file called PK22-AllMedsDB.pdb, and click OK.
New users should install this file. **If you are using a PatientKeeper Personal v. 2.21 or better, installing this file will replace your previous personal medications database.**

Click **Done**. The install tool will confirm that the file(s) will be uploaded to your Palm™ connected organizer the next time you perform a HotSync® operation.

Click **OK**.

Perform a HotSync operation. This will transfer PatientKeeper Personal to your Palm device.

**Installation — 2.12b and Earlier**

1. **Do not delete the current version of PatientKeeper Personal from your Palm.**
2. Install PK22.prc using the Palm Install Tool (as above).
3. Install PKConvert.prc using the PalmInstall Tool (also as above).
4. Perform a HotSync operation.
5. Three PatientKeeper Personal-related programs will be on your handheld device: **PtKeeper, PK22, and PKConvert**
6. Prior to converting your data, extract **all** patient data that you have placed in archives.

PatientKeeper Personal 2.2x **cannot** be used to extract archives created with earlier versions of PatientKeeper Personal. Extract them with the version in which they were created, and then perform this conversion. Once the conversion is complete, you can create new archives for your old patients with PatientKeeper Personal 2.2x.

7. Start **PKConvert**.
8. Tap **Convert PK 2.1x to PK 2.2x**.

Please note that **Plans** cannot be converted from the old format to the new format.

A message indicating a successful conversion will appear.

9. Start **PK22** and confirm that all your patients are now visible in the new version.
10. Delete **PKConvert** and **PtKeeper** from your handheld device.
REGISTRATION

PatientKeeper Personal is available for 21-days as a free trial. **After that time, the program must be registered to continue using it.**

To register, go to the Register section of the PatientKeeper Personal web site. Click either button at the bottom of the screen, and enter your credit card payment of USD $35.

After payment is confirmed, you will receive a confirmation e-mail.

You will be able to install the commercial version of PatientKeeper on your handheld. This version will not expire, however, you should check the website for updates.

If you have trouble registering, please email us at register@patientkeeper.com.
The navigation bar is visible at the bottom of most pages in PatientKeeper Personal. It allows you to jump from one page to another quickly. Each of the pages that can be accessed via the navigation bar are explained in more detail elsewhere in this manual.
**THE MAIN PAGE**

The PatientKeeper Personal Main Page appears the first time you activate PatientKeeper Personal. To return to it, tap the Main button at the lower right of the navigation bar.

**THE PATIENT LIST**

The most important feature of the Main Page is the Patient List. It contains basic information about each patient you have stored in PatientKeeper Personal. By tapping on the name of the patient in the list, you select that patient. After selecting a patient, you can choose to see any piece of information regarding that patient.

Place your stylus on a patient in the Patient List and hold it there. The **Information Window**, containing a more detailed description of the patient, will appear at the bottom of the screen. Lifting the stylus will close the Information Window.

**Each patient has a small checkbox before his/her name.**

Use this box in any way you choose. For example, you may want to check patients off that you have seen on a given day, or after you have written their notes.
Patients with an x before their names have been marked as Cross on the Edit Page screen so that you can distinguish between your own patients and those for whom you are cross-covering.

Patients with a line through them have been marked as DC (Discharged) on the Edit Patient screen.

Other options found on the Main Preferences Panel may be used to customize the look of this screen so it meets your needs.

NEW/EDIT RECORD

To create a new patient record, tap New at the lower right of the screen to open Edit Patient, where you initialize your patient’s information.

Select a patient.

Tap Edit at the bottom right of the screen.

CATEGORIES

Patients can be assigned to categories. Use this button to choose which category of patients is displayed in the Patient List.

TITLE BAR

On the Main page, tapping the Title Bar displays the number of patients in your Patient List.

STICKY NOTE

The sticky note is a graphical note that allows you to jot down quick notes in freehand (no Graffiti required) or jot down pictures.

Access this note from any screen by tapping the small icon just below and to the right of the navigation bar.

PatientKeeper Personal has one sticky note for the entire application; each patient does not have his/her own sticky note.
PULLDOWN MENUS

Each page in PatientKeeper Personal has many more functions than can fit on a page. Functions such as record manipulation, output, and preferences can be found tapping on the Pulldown Menus icon.

The advanced features found in the Main page pulldown menus greatly enhance PatientKeeper Personal’s utility. They can be used to customize the appearance of many pages, customize the default behavior of the program, manipulate large numbers of patient records, and generate many forms of useful output. Each of these features is described below.

The following three menus become visible once you tap the Pulldown menus icon on the Main page.

THE FILE MENU

The following functions are accessible from the File menu.

1. New Patient — identical to tapping the New button on the Main page.

2. Delete Patient — when a patient has been selected from the Patient List, this option may be used to delete his/ her record and all information associated with him/ her.

   The action is not reversible. It will not be possible to access a patient after he/ she has been deleted.

3. Purge Category — function deletes all the patients in your current category.

   The action is not reversible. If the current category is all, all of the patient’s records will be deleted from the handheld device permanently.
4. Purge CrossCover Patients — deletes all the patients that are marked as Cross. This also not reversible.

5. Add to Archive — adds a patient to your patient archive. See Archiving for more details.

6. View Archive — see your currently installed archive. See Archiving for more details.

7. Beam — opens the Beam Dialog. See Beaming for more details.

THE REPORTS MENU

The Reports menu can be used to create reports about the: (1) Checkout List; (2) SOAP (Progress) Note; and (3) History and Physical. In addition, custom Headers and Footers that will be appended to each report can be created and edited. For more detail, see the section titled Reports.

THE OPTIONS MENU

The Options menu contains Preferences, About and Register. About and Register are discussed before Preferences.

ABOUT

About tells you what version of PatientKeeper Personal you are running and where to find help.

REGISTER

To register, first go to the Register section of the PatientKeeper Personal web site. Click on either button at the bottom of the screen, and enter your credit card payment of USD $35.

If you are prompted, provide your Palm User Name. This is the same as your HotSync Name. This information must be exact, including all punctuation and capitalization.

After payment is confirmed, we will receive a confirmation e-mail. (This may take up to 12 hours). We will then send you your Registration Key. If you are paying by check, be sure to include your Palm User Name and e-mail address so that we may promptly process your order and send you your Registration Key.
Enter your registration key on the line provided. If the entry is successful, a page will appear indicating so. If not, you will be told that the registration code was not correct.

If you are unsure of whether or not your software is already registered, this information is printed across the middle of the screen in bold letters, as indicated in the diagram above.

The most common reason for an incorrect registration code is an incorrect Palm User Name. Please check to be sure the Palm User Name you provided us (listed in the email confirmation of registration you receive) is exactly the same as the one on your Register! screen. Note that the name should be flush with the left side of the screen. If it is not, then you have a leading space in your user name and we must know this! (For example, your Palm User Name may look like John but really it may be John with a leading space).

If you have trouble registering, please email us at register@patientkeeper.com.
THE MAIN PREFERENCES PANEL

Throughout PatientKeeper Personal there are many Preferences Panels. Each is titled according to the page from which it was opened. Therefore, the Preferences Panel on the Main Page is the Main Preferences Panel. The options are discussed in detail below.

<table>
<thead>
<tr>
<th>Preferences</th>
<th>Sort By: Bed Name</th>
<th>Order: Up Down</th>
</tr>
</thead>
<tbody>
<tr>
<td>ID: ME DOB</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Show Age</td>
<td>first day: 1</td>
<td></td>
</tr>
<tr>
<td>Show Race</td>
<td>Print New Records</td>
<td></td>
</tr>
<tr>
<td>Show Sex</td>
<td>Show DC Patients</td>
<td></td>
</tr>
<tr>
<td>Show Dx</td>
<td>Always Show Bed</td>
<td></td>
</tr>
<tr>
<td>Always Show ID</td>
<td></td>
<td></td>
</tr>
<tr>
<td>New Labs default to 7AM</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Mark New Patients as cross</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Always start on Main</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Always start on list used page</td>
<td></td>
<td></td>
</tr>
<tr>
<td>OK Print</td>
<td>Palette</td>
<td></td>
</tr>
</tbody>
</table>

Sort By: The Main Patient List can be sorted alphabetically by bed or by patient name.

**ID**: The hospital ID is visible in many place in PatientKeeper Personal. It is listed on the Patient List, on the Summary page, and on all reports, including SOAP notes, H&P's, and Checkout Lists.

By default, the text is entered on the Edit Patient page in the **ID** field.

Many hospitals use the date of birth (DOB) as a unique identifier for a patient. To display the DOB in all the places where the ID is displayed, choose **DOB**.

**Order**: This is the order in which the alphabetical sorting is done. **Up** means A->Z. **Down** means Z->A.

**Show Age**: Check this box to show the age on the main patient list.

**Show Race**: Check this box to show race on the main patient list.

**Show Sex**: Check this box to show sex on the main patient list.

**Show Dx**: Check this box to show the diagnosis on the main patient list.

**Always Show ID**: Check this box to always show the patient's ID on the patient list.

This makes less room available for the patient description, but it allows you to see the entire patient ID at a quick glance.
By default, if this box is not checked, PatientKeeper Personal will try to show as much of the ID number as possible. However, but screen space is limited, and things like the age, race, and diagnosis usually take up the majority of the room on the screen.

**first day is 1**: Some physicians consider the date of admission as hospital day number zero. Others, consider the date of admission as day 1. If you would like hospital day calculation to be based upon the admission date being day 1, check this option.

**Print New Records**: Check this option to have the print icon selected by default each time a new record is created. For more details on printing and the use of the printer icon, see the section titled Reports.

**Show DC Patients**: Check this option if you would prefer your discharged patients to be visible in your main Patient List, with a line marked through them.

**Always Show Bed**: Check this option if you would always like the patient's bed number visible on the main Patient List. Keep in mind that when this box is *not* checked, the bed is still visible if there is room enough on the screen. When this box *is* checked, the bed number will always be visible, but there will be less room for the age, race, sex, and diagnosis.

**Sticky Categ.**: If a patient’s category is changed when entries are being edited and the Sticky Categ. box *is* checked, when OK is tapped, your patient will still be visible, and your patient list will have changed to the new category. If this option is *not* checked, when OK is tapped, your patient will *not* be visible, and you will still be in your original category.

**Example**

Suppose you have two categories of patients, **Primary** and **Consult**. Suppose you were initially consulted on Mr. X, and he was therefore in your Consult category.

Now, M. X’s primary problem becomes the reason you were consulted, and he is transferred to your service. You are now his primary physician and you need to move him to the Primary category.

Mr. X’s name appears in the Patient List under **Consult**. To place him in the Primary category, tap the record. Then tap **Edit**. The Edit Patient page will be displayed. Change the category to **Primary**.

Tap **OK** to return to the Main page. If the **Sticky Categ.** option was not checked, Consult will appear but Mr. X’s name will no longer be on the list since he is now listed under Primary. If the **Sticky Categ.** option was checked, Primary will appear and Mr. X will be listed there.
**New rec times default:** This feature is used to choose the time at which to a new record will be created.

If 7AM is selected, then each new lab is marked as 7AM of that day. If *Now* is selected, then each new lab is set to the current time.

If **Last** is chosen, each new record is set to the time of the previously set lab. (Thus, if the last record you created was listed as **11/ 31/ 99 09:54**, then the next lab you create will be set to the same time).

**Mark beamed-in patients as cross:** When patients are beamed to you, identify them as your personal patients or cross-covered patients.

If this option **is** checked, all patient records you are beamed will be marked as **Cross** and will appear with an **x** before their names on the Patient List.

If it is **not** checked, then each beamed-in patient will be added to your database **without** the Cross indication.

**Always Start on Main/ Always Start On Last**

Highlight **Always Start On Main** to always start PatientKeeper Personal on the Main Page.

Highlight **Always Start On Last** to start PatientKeeper Personal on the last page you were viewing.

**IrPrint/ PalmPrint:** Older versions of PatientKeeper Personal supported either IrPrint or PalmPrint for the printer driver.

It is recommended that you only use PalmPrint to print PatientKeeper Personal pages so that IrPrint will work optimally. However, use this option to choose the printer driver software that will be used to print reports from PatientKeeper Personal. For more details on printing, go to the section titled Reports.
EDIT PATIENT

To open Edit Patient, go to the Main page. Tap **New** or **Edit**. The page should be used to enter a patient's basic demographic information. It contains several features that will minimize the time it takes to enter this information.

**NAME**

When a patient is first created, his/her last name **must** be entered in the first field visible on this page. All other items are optional.

*If you do not enter a last name for the patient, PatientKeeper Personal will assume that you did not want to create a patient, and will delete the patient when OK is tapped.*

**ID**

The Hospital ID is the second field on this page. Most hospital ID’s are numeric. Use the **keypad** provided to enter these numbers.

If your hospital does not use a hospital ID, or uses the Date of Birth instead, simply leave this field blank.

**DATE OF BIRTH**

Below the hospital ID there is a button labeled "DOB"(date of birth), and along side it, a selector trigger (a box with a dotted line around it) with the word **-Enter-** in it.

Tap **Enter** to open the Palm device's calendar and select the patient’s date of birth. To select the decade in which a patient was born quickly, tap DOB adjacent to the selector trigger. A popup list that allows you to choose the decade in which your patient was born will be opened.
For example, if your patient’s date of birth is February 12, 1941, you would choose 1940’s from this list of decades. A calendar centered at 1945 will appear. Scroll down four years and to find the date.

AGE

Once a date of birth has been selected, the age of the patient automatically appears next to the word Age just to the right of the DOB selector trigger. If the patient is 0-1 month old, the age is in days. If the patient is 1-6 months, the age is in weeks. If he/she is 7-24 months, it is in months. After 24 months, age always appears in years.

If you do not have the date of birth, or you are not interested in the patient’s exact date of birth fill in the patient’s age on the line beside Age. Age may be entered with Graffiti or with the keypad. We suggest you use the date of birth feature, as this will automatically update the patient’s current age.

RACE AND BED

Below the date-of-birth selector is a field for race and a field for bed. Text may be entered directly or by tapping the word Race or the word Bed to select text from a popup list. A popup list is a list of short terms that you commonly use.

DATE OF ARRIVAL

Below the Bed field is another selector trigger. This selector trigger, labeled DOA, for date-of-admission, which appears below Bed. Tapping it opens the Palm calendar. DOA is used to calculate the hospital day. It is set by default to the present date.

CATEGORIES

Categories appears below the date-of-admission selector trigger. It is a pop-trigger (a small inverted triangle) used to displays and select the Patient Category into which this patient falls. When you return to the Main Page this patient will be listed under the category All as well as in the category chosen here.

The categories are completely of your own choosing, and can be things like In-House and Out-Patients, or Primary and Consults, or even Intern 1 and Intern 2. You may have up to thirteen Patient Categories.
**Discharge and Cross-Cover**

Lastly, Edit Patient has two check-boxes. The first, just below the keypad, and labeled **Cross** places an x before the patient's name on the Main page. This is intended to be a way for you to mark the patients for whom you are cross covering so that they can be differentiated from your personal patients. To mark the patient as cross, opening the Main page, then going to file and selecting the delete all cross-covered patients option.

The second of these check-boxes is labeled **DC** for discharge. Mark this box when a patient has been discharged. The patient will either disappear from your list, or appear with a line through his/her name. The option to choose between the two is discussed in the Advanced Features section.

**Where to go from here...**

A number of options are available.

1. Tap **OK** to save the information and go back to the Main page. If no name has been filled out, you will be asked to **Delete** the patient record.

2. Tap **Delete** to delete the patient. **All records associated with your patient will be removed from your Palm device and will no longer be accessible; this can not be undone.**

3. Tap **Go to H&P**, to go directly to this patient's History and Physical. or

4. Tap the **left** or **right** arrows at the top of the screen to go to the Edit Patient page for the next or the previous patient in your patient list.
**Popup Lists**

A popup list is a list of text items that may be added to any text field to decrease the time it takes to fill out patient data. A simple example is illustrated in the above screen shot where a user is filling out the *Edit Patient* for a patient. To display a list of possible races from which to choose instead of using Graffiti®, tap *Race*.

**Popup List Types**

Popup lists are available for almost every field in PatientKeeper Personal. To make one appear, tap the field label. Three lists have variations: (1) the Categorical Popup List; (2) Quick Text Buttons; and (3) the ROS or Review of Systems.

The Categorical Popup List is visible for the CC, HPI, PMH, PSH, and Problems fields in PatientKeeper Personal. Tapping the field label for these items will produce categories of terms such as Constitutional, Cardiovascular, and Renal. Choose the category of terms you would like to see and a standard popup list will appear.

Quick-Text Button include the buttons in the PMH, PSH, FH, SH, and Physical Exam portions of the program. When these buttons are tapped once a commonly used phrase will be entered into the corresponding field. Items may be edited. See Creating and Editing Popup Lists for further information.

The ROS, the Review of Systems is a categorical popup list restricted to 12 items per list. (While it is possible to enter more than 12 items, they will not be visible in the ROS). Each item corresponds to a question on the ROS page. Creating and editing the ROS is discussed in the History and Physical section of this manual.
CREATING AND EDITING POPUP LISTS

The items that appear in the Popup Lists are completely customizable. If you have not entered any items into a list, you will be prompted to Create List when you tap on the label next to the field.

To create a new list, tap OK.

To quit without making a new list, tap Cancel.

If a list already exists under for a particular field, it may be changed by tapping Edit.

Once you choose to edit or create a popup list, Edit Popup List will be displayed.

To enter a new item, use Graffiti® and write in the item text in the field.

When you are done with that item, tap the <END> button at the top of the screen, or manually write a < and the text <END> will be filled in.

The <END> tag tells PatientKeeper Personal that it is at the end of the text for one item on the list. While not all of the text you write will necessarily appear in the popup list (only one line of text will appear), all the text you enter up until the <END> tag will be placed into the corresponding field if you choose that option.

There are two checkboxes at the bottom of Edit Popup Lists.

Choose the alphabetize checkbox to automatically alphabetize your list choices when you have finished.

Choose the Always expand this field checkbox to create an expanded field when tapping the label of this field. There is more information about expanding a field below.
**STREAMLINING MANAGEMENT PLAN ENTRY**

Once the popup list has been set up, two taps—one to bring up the popup list, and one to choose the text item desired—will enter an entire management plan. An example, using Chest Pain is described below

**Edit Popup Lists** may contain a list for the Plan field of the History and Physical that looks like this:

- **GI Bleed:**
  1. Scope in AM
  2. NPO
  3. TxC 2 units PRBCs
  4. check CBC

- **Chest Pain:**
  1. Give aspirin
  2. Give O2
  3. Check EKG
  4. Rule out MI

After the text has been entered, **alphabetize**. Tap **OK**. Now, when you tap the label for the Plan field, the entries will have been alphabetized as follows:

- **Chest Pain:**
  - **GI Bleed:**

Tap **Chest Pain**. The following entries will be placed in the Plan field:

- **Chest Pain:**
  1. Give aspirin
  2. Give O2
  3. Check EKG
  4. Rule out MI
IMPORTING AND EXPORTING POPUP LISTS

While entering all the list choices yourself would save you a great deal of time in the long run, PatientKeeper Personal is set up to allow you to share the list items you have entered with others and vice versa. The Import/Export feature of the Edit Popup Lists Page, you be used to import pre-written popup list items that can be downloaded from the PatientKeeper website.

To import a popup list, such as the one for Race, install the file **PK-ImpExpLists.pdb**, file is included in the files you originally downloaded with PatientKeeper Personal. If you no longer have the file it may be obtained from the PatientKeeper website.

When the file has been installed, go to a list you would like to import.

Choose to edit or create this list, as described above, to open Edit Popup List.

Tap the **Imp/Exp** button at the lower right of the screen. A box will appear.

To see the list prior to importing it from the PK-ImpExpLists database, choose **View Importable List**. The list in the ImpExpLists database for this field will appear.

To import the list, choose **Import List**. Then tap **OK**. The imported list items will be added to your existing list items.

To create your own PK-ImpExpLists to distribute to others, go to the list you would like to add to your exported lists.

Open **Edit Popup Lists** by choosing **Edit**.

Select the **Imp/Exp** button on the bottom right of the screen.

Choose Export List for Distribution in the box that appears.
To automatically import all the lists from the PK-ImpExpLists database, go to the Edit Popup List page for any list. Choose **Import ALL Lists** from the pulldown menus.

To export all your lists for distribution, choose **Export All Lists** from the pulldown menus.

**THE QUICK-TEXT BUTTONS**

Quick-text buttons can be used to enter data even more quickly than can be done with popup lists. They are available for the PMH, PSH, FH, SH, and physical exam. Each field has a fixed (unchangeable) number of buttons.

Quick-text buttons labels may be changed to anything you choose. Though only the first few letters of the label will appear in the button, once it is tapped, the entire text will appear.

When a Quick-text button is edited, the default label will be deleted.

To edit the quick-text buttons, choose **Edit Quick-Text** from the pull-down menus on the pages that have quick-text buttons.

Choose the appropriate group of quick-text buttons to edit. **Edit Popup Lists** will appear.

Enter text just as you would for a popup list, with the <END> tag after each item.

Although you can enter as many items as you wish, only the items for the number of quick-text buttons in the group you are editing will be usable.

**EXPANDING FIELDS**

Because of the small screen size of handheld devices, it is often difficult to see all the text you have entered in a small field. For example, four lines of text may have been entered in the PMH, but only two will be visible at any given time, and you must scroll to see the rest. In addition, often times it is easier for you to choose multiple items from a popup list before it closes.

To accommodate both of these situations, use Expand Field. When the Expand Field is chosen for a particular field and the label next to it is tapped, a new page appears that is the full-width of the screen and 9-10 lines long but is the field you wish to edit. This allows you to see much more of your text at one time without scrolling. The popup list for Expand Field
is at the bottom of this page. It will remain open so you can choose as many options from the list as you desire without having to re-open it.

Choose the popup list for a field by tapping the associated label.

If a list does not exist, create one.

Go to the Edit Popup Lists page and mark Always Expand Field. Then tap OK. The next time you choose this popup list, the field will be expanded.

Fields which have a categorical popup list require the Expand Field option to be chosen on the first list category.

For example, in the CC, the Common Phrases list must have the Always Expand checkbox marked.

To return to the popup list, remove the check from the Always Expand checkbox.
**VITALS**

The Vitals Signs for the patient include $T_{\text{max}}$, $T_{\text{current}}$, $T_{\text{minimum}}$, $P_{\text{current}}$, $P_{\text{range}}$, $R_{\text{current}}$, $R_{\text{range}}$, $BP_{\text{current}}$, $BP_{\text{range}}$, $O_2$ Sats, I/O, Net, and Weight. To scroll through this information, use the right and left arrow keys which are located on the bottom right of the screen.

Tap **New** in the bottom right corner of the screen to enter a new vital. Tap an existing vital will open **Edit Vitals**.

As on all pages, the patient's name is in the top right corner of the page, and the navigation bar is visible at the bottom of the page.

Switch between patients by tapping on the patient's name at the top right and choosing from the list of patients that appears.

Jump to any other part of PatientKeeper Personal with the navigation bar at the bottom of the screen.

<table>
<thead>
<tr>
<th>Date</th>
<th>Tm</th>
<th>Tc</th>
<th>Tmi</th>
<th>Pc</th>
<th>P</th>
</tr>
</thead>
<tbody>
<tr>
<td>4/23</td>
<td>38.9</td>
<td>38.0</td>
<td>37.5</td>
<td>85</td>
<td>85-95</td>
</tr>
<tr>
<td>4/22</td>
<td>38.8</td>
<td>37.0</td>
<td>36.9</td>
<td>85</td>
<td>80-100</td>
</tr>
<tr>
<td>4/21</td>
<td>41.2</td>
<td>39.0</td>
<td>37.8</td>
<td>70</td>
<td>65-75</td>
</tr>
</tbody>
</table>
**EDIT VITALS**

Edit Vitals is used to enter new vitals or modify existing vital signs.

**DATE AND TIME FIELDS**

Tap the **Date** box to open an area where the date on which the procedure took place can be entered.

Tap the **Time** box to display an area where the time at which the procedure took place can be entered.

**VITAL ENTRY FIELDS**

The rest of Edit Vitals is devoted to entering information related to vital signs. The item field can be filled in three ways: (1) writing in the vitals directly with Graffiti; (2) using the keypad in the lower right corner; and (3) selecting vitals from pop-up lists. Tap on the desired vital. A list of vitals will appear. Choose one that is appropriate.

Any of the pop-up lists may be changed to reflect your preferences by selecting **Edit...**
**ABBREVIATION KEY**

<table>
<thead>
<tr>
<th>Abbreviation</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Tc</td>
<td>Current Temperature</td>
</tr>
<tr>
<td>Tm</td>
<td>Maximum Temperature</td>
</tr>
<tr>
<td>Tmin</td>
<td>Minimum Temperature</td>
</tr>
<tr>
<td>Pc</td>
<td>Current Pulse</td>
</tr>
<tr>
<td>Prange</td>
<td>Range of Pulse</td>
</tr>
<tr>
<td>Rc</td>
<td>Current Respiratory Rate</td>
</tr>
<tr>
<td>Rrange</td>
<td>Range of Respiratory Rate</td>
</tr>
<tr>
<td>BPe</td>
<td>Current Blood Pressure</td>
</tr>
<tr>
<td>BPrange</td>
<td>Range of Blood Pressure</td>
</tr>
<tr>
<td>Sat</td>
<td>O$_2$ Saturation</td>
</tr>
<tr>
<td>I</td>
<td>Ins</td>
</tr>
<tr>
<td>O</td>
<td>Outs</td>
</tr>
<tr>
<td>Net</td>
<td>Net Difference</td>
</tr>
<tr>
<td>Wt</td>
<td>Weight</td>
</tr>
<tr>
<td>BG</td>
<td>Blood Glucose</td>
</tr>
</tbody>
</table>
CBC/Hematology contains the complete blood count for the patient including the Hct, Hgb, WBC, Platelets, Seg, Bands, Lymphs, Monos, Basos, Eos, MCV, MCH, MCHC, RBC, RDW, Retic and Smear. Scroll through all this information by using the right and left arrow keys which are located in the bottom right of the screen.

Tap New in the bottom right corner of the screen to enter a new CBC/Hematology. Alternatively, tap any of the existing labs to open Edit Hematology.

Tapping New and not entering any data in Edit Hematology means that a lab is pending. Check labs: hematology will be placed on your To Do List.

As on all pages, the patient's name is in the top right corner of the page, and the navigation bar is visible at the bottom of the page. Switch between patients by tapping on the patient's name at the top right and choosing from the list of patients that appears. Use the navigation bar at the bottom of the screen to jump to any other part of PatientKeeper Personal with the navigation bar at the bottom of the screen.
EDIT HEMATOLOGY

Edit Hematology is used to enter new hematology labs or to modify existing hematology labs.

DATE AND TIME FIELDS

Tap the Date box to open an area where the date on which the procedure took place can be entered.

Tap the Time box to display an area where the time at which the procedure took place can be entered.

VITAL ENTRY FIELDS

The remaining fields on the Edit Vitals Page are where the vitals information is entered. The item field can be filled in three ways: (1) writing in the vitals directly with Graffiti; (2) using the keypad in the lower right corner; and (3) selecting vitals from pop-up lists. Tap on the desired vital. A list of vitals will appear. Choose one that is appropriate.

Any of the pop-up lists may be changed to reflect your preferences by selecting Edit...
ABBREVIATION KEY

CBC Shorthand
  Hgb-Hemoglobin
  Hct-Hematocrit
  WBC-White Blood Cell Count
  Platelet Count
S  Neutrophils, Segmented
B  Neutrophils, Band
L  Lymphocytes, Total
M  Monocytes
B  Basophils
E  Eosinophils
MCV  Mean Corpuscular Volume
MCH  Mean Corpuscular Hemoglobin
MCHC  Mean Corpuscular Hemoglobin Concentration
RBC  Red Blood Cell Count
RDW  Red Cell Distribution Width
Retic  Reticulocyte Count
Smear  Blood Smear

PREFERENCES

PatientKeeper Personal may be configured to meet your needs.

  Tap the Menu button located to the lower left of the Graffiti box.

  Choose Options.

  Select Preferences.

  Place the WBC on the right or left side of the CBC shorthand.
The chemistry page contains blood chemistry for the patient. This includes the sodium, potassium, chloride, bicarbonate, blood urea nitrogen, creatinine, glucose, serum osmolality, calcium, magnesium, phosphorus, total protein, albumin, total bilirubin, direct bilirubin, aspartate aminotransferase, alanine aminotransferase, alkaline phosphorus, lactate dehydrogenase amylase, lipase, ammonia, and uric acid. Scroll through the information by using the right and left arrow keys which are located in the bottom right of the screen.

Tap **New** in the bottom right corner of the screen to enter a new chemistry. Alternatively, tap any of the existing labs to open **Edit Chemistry**.

Tapping **New** and not entering any data in Edit Chemistry means that a lab is pending. Check labs: chemistry will be placed on your To Do List.

As on all pages, the patient's name is in the top right corner of the page, and the navigation bar is visible at the bottom of the page. Switch between patients by tapping on the patient's name at the top right and choosing from the list of patients that appears. Use the navigation bar at the bottom of the screen to jump to any other part of PatientKeeper Personal with the navigation bar at the bottom of the screen.
EDIT CHEMISTRY

The Edit Chemistry Page is used to enter new chemistry labs or to modify existing chemistry labs.

DATE AND TIME FIELDS

Tap the Date box to open an area where the date on which the procedure took place can be entered.

Tap the Time box to display an area where the time at which the procedure took place can be entered.

THE VITAL ENTRY FIELDS

The remaining fields on the Edit Vitals Page are where the vitals information is entered. The item field can be filled in three ways: (1) writing in the vitals directly with Graffiti; (2) using the keypad in the lower right corner; and (3) selecting vitals from pop-up lists. Tap on the desired vital. A list of vitals will appear. Choose one that is appropriate.

Any of the pop-up lists may be changed to reflect your preferences by selecting Edit...
**ABBREVIATION KEY**

Chem 7 Shorthand
- Na - Sodium
- K - Potassium
- Cl - Chloride
- HCO - Bicarbonate
- BUN - Blood Urea Nitrogen
- Cr - Creatinine
- Glu - Glucose

- Osm - Osmolality
- Ca - Calcium
- Mg - Magnesium
- Ph - Phosphorus
- TP - Total Protein
- Alb - Albumin
- Tbili - Total Bilirubin
- Dbili - Direct Bilirubin
- AST - Aspartate Aminotransferase
- ALT - Alanine Aminotransferase
- AlkP - Alkaline Phosphorus
- LDH - Lactate Dehydrogenase
- Amy - Amylase
- Lip - Lipase
- NH4 - Ammonia
- UA - Uric Acid
The coags page contains coagulation tests including the prothrombin time, the partial thromboplastin time, INR, fibrinogen, fibrin split products, D-dimer, bleeding time, and thrombin time. Scroll through the information by using the right and left arrow keys located on the bottom right of the screen.

Tap New in the bottom right corner of the screen to enter a new coagulation lab. Alternatively, tap any of the existing labs to open Edit Coagulation.

Tapping New and not entering any data in Edit Coagulation means that a lab is pending. Check labs: coagulation will be placed on your To Do List.

As on all pages, the patient’s name is in the top right corner of the page, and the navigation bar is visible at the bottom of the page. Switch between patients by tapping on the patient’s name at the top right and choosing from the list of patients that appears. Use the navigation bar at the bottom of the screen to jump to any other part of PatientKeeper Personal with the navigation bar at the bottom of the screen.
EDIT COAGULATION

Edit Coagulation is used to enter new coagulation labs or to modify existing coagulation labs.

DATE AND TIME FIELDS

Tap the Date box to open an area where the date on which the procedure took place can be entered.

Tap the Time box to display an area where the time at which the procedure took place can be entered.

VITAL ENTRY FIELDS

The remaining fields on the Edit Coagulation Page are where the lab values are entered. The item field can be filled in three ways: (1) writing in the vitals directly with Graffiti; (2) using the keypad in the lower right corner; and (3) selecting vitals from pop-up lists. Tap on the desired vital. A list of vitals will appear. Choose one that is appropriate.

Any of the pop-up lists may be changed to reflect your preferences by selecting Edit...
<table>
<thead>
<tr>
<th>Abbreviation</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>PT</td>
<td>Prothrombin Time</td>
</tr>
<tr>
<td>PT</td>
<td>Partial Thromboplastin Time</td>
</tr>
<tr>
<td>INR</td>
<td></td>
</tr>
<tr>
<td>Fib</td>
<td>Fibrinogen</td>
</tr>
<tr>
<td>FSP</td>
<td>Fibrin Split Products</td>
</tr>
<tr>
<td>D dim</td>
<td>D-Dimer</td>
</tr>
</tbody>
</table>
CARDIAC

The cardiac page contains cardiac labs for the patient. Scroll through this information using the right and left arrow keys, located in the bottom right of the screen.

Tap **New** in the bottom right corner of the screen to enter a new chemistry. Alternatively, tap any of the existing labs to open **Edit Cardiac**.

Tapping **New** and **not** entering any data in Edit Cardiac means that a lab is pending. Check labs: cardiac will be placed on your **To Do List**.

As on all pages, the patient's name is in the top right corner of the page, and the navigation bar is visible at the bottom of the page. Switch between patients by tapping on the patient's name at the top right and choosing from the list of patients that appears. Use the navigation bar at the bottom of the screen to jump to any other part of PatientKeeper Personal with the navigation bar at the bottom of the screen.
EDIT CARDIAC

The Edit Cardiac Page is used to enter new cardiac labs or to modify existing cardiac labs. You can also scroll among the various cardiac labs using the right and left arrow keys at the top of the screen.

DATE AND TIME FIELDS

Tap the Date box to open an area where the date on which the procedure took place can be entered.

Tap the Time box to display an area where the time at which the procedure took place can be entered.

LAB ENTRY FIELDS

The remaining fields on the Edit Cardiac Page are where the lab values are entered. The item field can be filled in three ways: (1) writing entries directly with Graffiti; (2) using the keypad in the lower right corner; and (3) selecting entries from pop-up lists. Tap on the desired lab. A list of values will appear. Choose one that is appropriate.

Any of the pop-up lists may be changed to reflect your preferences by selecting Edit...
**Blood Gas**

The blood gas page contains the blood gas values for the patient. Scroll through the information by using the right and left arrow keys located at the bottom right of the screen.

Tap **New** in the bottom right corner of the screen to enter new blood gas values. Alternatively, tap any of the existing labs to open **Edit Blood Gas**.

Tapping **New** and **not** entering any data in **Edit Cardiac** means that a lab is pending. Check labs: blood gas will be placed on your To Do List.

As on all pages, the patient’s name is in the top right corner of the page, and the navigation bar is visible at the bottom of the page. Switch between patients by tapping on the patient’s name at the top right and choosing from the list of patients that appears. Use the navigation bar at the bottom of the screen to jump to any other part of PatientKeeper Personal with the navigation bar at the bottom of the screen.
EDIT ABG

Edit ABG is used to enter new blood gas values or to modify existing values. You can also scroll among the various blood gases using the right and left arrow keys at the top of the screen.

DATE AND TIME FIELDS

Tap the **Date** box to open an area where the date on which the procedure took place can be entered.

Tap the **Time** box to display an area where the time at which the procedure took place can be entered.

THE TYPE FIELD

Tap on the arrow to choose between arterial or venous.
LAB ENTRY FIELDS
The remaining fields on the Edit ABG Page are where the lab values are entered. The item field can be filled in three ways: (1) writing the entries directly with Graffiti; (2) using the keypad in the lower right corner; and (3) selecting entries from pop-up lists. Tap on the desired vital. A list of vitals will appear. Choose the desired one.

Any of the pop-up lists may be changed to reflect your preferences by selecting Edit...

RESPIRATORY SUPPORT FIELDS
These fields are used to indicate respiratory support.

Use On to show how the oxygen is being delivered.

The O₂ field is indicates the amount of oxygen being delivered.

The field can be filled in three ways: (1) writing entries directly with Graffiti; (2) using the keypad in the lower right corner; and (3) selecting entries from pop-up lists. Tap the desired entry. A list will appear. Choose one that is appropriate. Any of these lists may be edited to your preferences by selecting Edit...

NOTE FIELD
This field can be used to write any notes about the ABG. The item field can be filled in two ways: (1) writing the entries directly with Graffiti; and (2) selecting entries from pop-up lists. Tap the desired lab. A list will appear. Choose the desired one.

Any of the pop-up lists may be changed to reflect your preferences by selecting Edit...
The micro page contains information about microbiology for the patient. Scroll through this information by using the right and left arrow keys located in the bottom right of the screen.

Tap **New** in the bottom right corner of the screen to create a new microbiology entry. Alternatively, tap any of the existing labs to open **Edit Microbiology**.

Tapping **New** and **not** entering any data in Edit Cardiac means that a lab is pending. Check labs: blood gas will be placed on your To Do List.

As on all pages, the patient's name is in the top right corner of the page, and the navigation bar is visible at the bottom of the page. Switch between patients by tapping on the patient's name at the top right and choosing from the list of patients that appears. Use the navigation bar at the bottom of the screen to jump to any other part of PatientKeeper Personal with the navigation bar at the bottom of the screen.
EDIT MICROBIOLOGY

Edit Microbiology is used to enter a new microbiology entry or to modify an existing one. Scroll among the various entries by using the right and left arrow keys at the top of the screen.

THE DATE AND TIME FIELDS

Tap the Date box to open an area where the date on which the procedure took place can be entered.

Tap the Time box to display an area where the time at which the procedure took place can be entered.

THE TYPE FIELD

The type field on the Edit Microbiology Page is where the type of micro lab is entered. The item field can be filled in two ways: (1) writing the entries directly with Graffiti; and (2) selecting entries from pop-up lists. Tap the desired lab. A list will appear. Choose the desired one.

Any of the pop-up lists may be changed to reflect your preferences by selecting Edit...
THE SITE FIELD

The Edit Microbiology site field is where the site of the culture is entered. The item field can be filled in two ways: (1) writing the entries directly with Graffiti; and (2) selecting entries from pop-up lists. Tap the desired lab. A list will appear. Choose the desired one.

Any of the pop-up lists may be changed to reflect your preferences by selecting Edit...

THE RESULTS FIELD

The Edit Microbiology Results field is where the culture result is entered. The item field can be filled in two ways: (1) writing the entries directly with Graffiti; and (2) selecting entries from pop-up lists. Tap the desired lab. A list will appear. Make an appropriate choice.

Any of the pop-up lists may be changed to reflect your preferences by selecting Edit...

NOTE FIELD

This field can be used to write any notes about the culture. The item field can be filled in two ways: (1) writing the entries directly with Graffiti; and (2) selecting entries from pop-up lists. Tap the desired lab. A list will appear. Make an appropriate choice. Any of these lists may be edited to your preferences by selecting Edit...

SENSITIVITIES AND RESISTANCE FIELD

These fields can be used to indicate the sensitivity and resistance of the microorganism. The item field can be filled in two ways: (1) writing the entries directly with Graffiti; and (2) selecting entries from pop-up lists. Tap the desired lab. A list will appear. Make an appropriate choice.

Any of the pop-up lists may be changed to reflect your preferences by selecting Edit...
**Urine**

The urine page contains information about urinalysis and urine chemistries for the patient.

- Tap **New UA**, located at the bottom of the screen, to enter a new urinalysis.
- Tap or **New U Chem**, at the bottom of screen, to a new urine chemistry.
- Tap any of the **existing entries** to open the edit page.

As on all pages, the patient’s name is in the top right corner of the page, and the navigation bar is visible at the bottom of the page. Switch between patients by tapping on the patient's name at the top right and choosing from the list of patients that appears. Use the navigation bar at the bottom of the screen to jump to any other part of PatientKeeper Personal with the navigation bar at the bottom of the screen.
**EDIT UA**

Edit UA is used to enter a new UA entry or to modify an existing one. You can also scroll among the various entries using the right and left arrow keys at the top of the screen.

**DATE AND TIME FIELDS**

Tap the **Date** box to open an area where the date on which the procedure took place can be entered.

Tap the **Time** box to display an area where the time at which the procedure took place can be entered.

**LAB ENTRY FIELDS**

The remaining fields on the Edit UA Page are where the lab values are entered. The item field can be filled in three ways: (1) writing it in directly with Graffiti; (2) tapping on -, +, ++, +++ if available; and (3) selecting values from pop-up lists. Tap the desired lab. A list will appear. Make an appropriate choice.

Any of the pop-up lists may be changed to reflect your preferences by selecting **Edit...**
EDIT URINE CHEM

Edit Urine Chem is used to enter a new Urine Chem entry or to modify an existing one. Scroll among the various entries by using the right and left arrow keys at the top of the screen.

THE DATE FIELD

Tap the Date box to open an area where the date on which the procedure took place can be entered.

THE TYPE FIELD

Tap the Type picker to choose whether the urine chemistries are based on a spot urine collection or a 24 hour urine collection.

LAB ENTRY FIELDS

The remaining fields on the Edit Urine Chem Page are where the lab values are entered. The item field can be filled in two ways: (1) writing the entries directly with Graffiti; and (2)
selecting entries from pop-up lists. Tap the desired lab. A list will appear. Make an appropriate choice.

Any of the pop-up lists may be changed to reflect your preferences by selecting **Edit...**
**Tests**

The test page contains results for any tests undergone by the patient.

Tap **New** on the bottom right corner of the screen to enter a new test.

Tap any existing test to open **Edit Test**.

As on all pages, the patient's name is in the top right corner of the page, and the navigation bar is visible at the bottom of the page. Switch between patients by tapping on the patient's name at the top right and choosing from the list of patients that appears. Use the navigation bar at the bottom of the screen to jump to any other part of PatientKeeper Personal with the navigation bar at the bottom of the screen.
EDIT TEST

Edit Test is used to enter new tests or to modify existing tests. Scroll among the various tests using the right and left arrow keys at the top of the screen.

DATE AND TIME FIELDS

Tap the Date box to open an area where the date on which the procedure took place can be entered.

Tap the Time box to display an area where the time at which the procedure took place can be entered.

TEST FIELDS

The test field on the Edit Test Page is where the test is indicated. The item field can be filled in two ways: (1) writing the entries directly with Graffiti; and (2) selecting entries from pop-up lists. Tap the desired lab. A list will appear. Make an appropriate choice.

Any of the pop-up lists may be changed to reflect your preferences by selecting Edit...
**The Results Field**

The Edit Test Results field is used to enter test results. The field can be filled in three ways: (1) writing entries directly with Graffiti; (2) using the keypad in the lower right corner; and (3) selecting entries from pop-up lists. Tap the desired entry. A list will appear. Choose one that is appropriate.

Any of these lists may be edited to your preferences by selecting *Edit...*
**OTHER LABS**

Other Labs contains lab results that are not put anywhere else.

Tap **New** in the bottom right corner of the screen to enter a new Other Labs.

Tap any of the **existing labs** to open **Edit Other**.

Tapping **New** and **not** entering any data in **Edit Other** means that a lab is pending.

Check labs: LLD will be placed on your To Do List.

As on all pages, the patient's name is in the top right corner of the page, and the navigation bar is visible at the bottom of the page. Switch between patients by tapping on the patient's name at the top right and choosing from the list of patients that appears. Use the navigation bar at the bottom of the screen to jump to any other part of PatientKeeper Personal with the navigation bar at the bottom of the screen.
EDIT OTHER LABS

Edit Other Labs is used to enter new other labs or to modify existing Other Labs. Use the left and right arrow keys at the top of the screen to see other labs.

DATE AND TIME FIELDS

Tap the Date box to open an area where the date on which the procedure took place can be entered.

Tap the Time box to display an area where the time at which the procedure took place can be entered.

THE TEST FIELD

The Edit Other Labs test field is where the test is indicated. The test field can be filled in two ways. The item field can be filled in two ways: (1) writing the entries directly with Graffiti; and (2) selecting entries from pop-up lists. Tap Test. A list will appear. Make an appropriate choice.

Any of the pop-up lists may be changed to reflect your preferences by selecting Edit...
THE RESULTS FIELD

Edit Test Results is where the test results are entered. The field can be filled in three ways: (1) writing entries directly with Graffiti; (2) using the keypad in the lower right corner; and (3) selecting entries from pop-up lists. Tap the desired entry. A list will appear. Choose one that is appropriate.

Any of the pop-up lists may be changed to reflect your preferences by selecting Edit...
IMAGING

The imaging page contains information about a patient’s imaging studies.

Tap **New** in the bottom right corner of the screen to enter a new imaging study.

Tap any of the **existing studies** to open **Edit Imaging**.

Tapping **New** and not entering any data in **Edit Imaging** means that a lab is pending. Check imaging: X-Ray will be placed on your To Do List.

As on all pages, the patient’s name is in the top right corner of the page, and the navigation bar is visible at the bottom of the page. You can switch between patients by tapping on the patient's name at the top right and choosing from the list of patients that appears. You can jump to any other part of PatientKeeper Personal with the navigation bar at the bottom of the screen.
EDIT IMAGING

Edit Imaging is used to enter imaging or to modify existing imaging. Scroll among the various imaging studies using the right and left arrow keys at the top of the screen.

DATE AND TIME FIELDS

Tap the Date box to open an area where the date on which the procedure took place can be entered.

Tap the Time box to display an area where the time at which the procedure took place can be entered.

TYPE

Edit Imaging Type is where the type of imaging is indicated. The item field can be filled in two ways: (1) writing the entries directly with Graffiti; and (2) selecting entries from pop-up lists. Tap Type. A list will appear. Make an appropriate choice.

Any of the pop-up lists may be changed to reflect your preferences by selecting Edit...
THE LOCATION FIELD

The Edit Imaging Location field is where the location of imaging is indicated. The item field can be filled in two ways: (1) writing the entries directly with Graffiti; and (2) selecting entries from pop-up lists. Tap Location. A list will appear. Make an appropriate choice.

Any of the pop-up lists may be changed to reflect your preferences by selecting Edit...

THE RESULTS FIELD

The Edit Imaging Results field is used to enter results. The item field can be filled in two ways: (1) writing the entries directly with Graffiti; and (2) selecting entries from pop-up lists. Tap the Result. A list will appear. Make an appropriate choice.

Any of the pop-up lists may be changed to reflect your preferences by selecting Edit...

THE DRAW BOX

The box at the bottom of the screen may be used to make a sketch of the imaging.

Select Draw. Use the stylus to make a sketch.

To turn the stylus into an erase, choose the Erase box.

Tap Clear to remove the entire image.
Medications

A patient's Meds (Medications List) are displayed on the Medications page. The list contains medications the patient is taking, the number of days each drug has been taken, the dose, route, and schedule of each medication, and whether or not they have held or discontinued.

Tap New at the bottom right of the screen to create a new medication entry for the patient.

Tap a medication to select it. Edit Medication (for that particular medication) will be displayed.

As on all pages, the patient's name is in the top right corner of the page, and the navigation bar is visible at the bottom of the page. Switch between patients by tapping on the patient's name at the top right and choosing from the list of patients that appears. Use the navigation bar at the bottom of the screen to jump to any other part of PatientKeeper Personal with the navigation bar at the bottom of the screen.

PULLDOWN MENUS

The following menus are available via the pull-down menus on the medications page.

- File - used to create a new medication record, to delete a medication record, or delete all the medications listed for current patient.

- Reports - used to create a report of the patient's medications. Choose Print Record or Print All Records to display a standard print dialog from which you can export to a memo, export to email, or print your report.
- **Options** – the Medication Preferences Panel is listed under the *Preferences* option in this menu.

- **About** – opens the About PatientKeeper Personal box.

- **Register** should be used to register with PatientKeeper Personal.

### The Medication Preferences Panel

Open the Medication Preferences Panel by accessing the pull-down menus on the medications page, and then choosing **Options** and **Preferences**. Medications has the following preferences.

- **Default Units**: Tap **New** to create a new medication record. Choose whether the units should be set to **mg** (milligrams) – the default - or whether they should be left blank and completed later.

- **Default Route**: Tap **New** to create a new medication record. Select **PO** (*Per Os*) – the default - or whether the route should be left as blank and completed later.

- **Sort By**: Medications on the Medications Page can be sorted alphabetically or by the **Start Date** that was entered in Edit Medications.

- **Include Day in Med Printouts**: Check this option to include the number of days the patient has been on a medication in all forms of medications output.

- **Automatically update meds DB**: Choose this option to update your medications database automatically each time you create a new medication. Your medications database is the list of medications that PatientKeeper Personal searches when using the Edit Medications auto-complete and auto-fill features.

  If these features are checked, any medication that is not in the database is added to it if you write it for a patient.

Changes to existing medications' dose/route/schedule will be saved automatically; thus, the most recent configuration will always be is saved and displayed the next time it is needed.
EDIT MEDICATIONS

Edit Medications is used to create and modify an existing patient's medication list, as well as to update your personal medications database.

THE MED FIELD

The Edit Medications Med field is used to enter the name of the medication that will be added to a patient's Medication List.

The Med field may be completed by using Graffiti or by tapping abc, on the left hand side of the Graffiti area to open an alphabetical keyboard.

Alternatively, go to the Medication field. Tap Med. A list of medications will be displayed. Tap one to choose it.

In general using Auto-Complete, described immediately below, is a more efficient way to enter a new medication.

AUTO-COMPLETE

As you begin to use Graffiti or the alphabetical keyboard to enter the first few letters of the medication you wish to add, PatientKeeper Personal will attempt to fill in the rest of the medication name based on your personal Medications Database.

For example, if you intend to add AZITHROMYCIN, use Graffiti to write A; ZITHROMYCIN will be filled in automatically.

If the medication that is filled in automatically is not the medication for which you are searching, use Graffiti or the keyboard to write more letters. PatientKeeper Personal will
narrow your search. For example, to add ALBUTEROL, write A; ZITHROMYCIN would appear. Write an L. Now BUTEROL will appear.

AUTO-FILL

When the medication has been identified, tap the Auto-Fill arrow to the right side of the Med field. The dose, route, schedule, and whether the drug is scheduled or PRN will be completed based on the information in your personal Medications Database.

THE PERSONAL MEDICATIONS DATABASE

Your personal medications database is a set of medications and the dose/route/schedule that you use most frequently; it is searched when Auto-Complete and Auto-Fill are used. PatientKeeper Personal is distributed with a basic version of this database that should be used as a place to start. It is important to update and modify the database so that it fits your prescribing practices.

ADDING A MEDICATION

Go to Edit Medications. Create a medication, as you would if you were adding a medication to a patient’s medication list.

Tap Update DB at the bottom right of the page.

MODIFYING A MEDICATION

To modify the dose, route, schedule, and whether the drug is scheduled or PRN, go to the Med field. Select the Med that is to be modified. Change the information. Tap Update DB at the bottom right of the screen to store the new information. 

**Only one dose, route, schedule, and Schedule/PRN choice may be stored per medication.**

It is not possible to change the way a medication is spelled. To change the spelling, create a new medication with the new spelling, and add it to the database. Then delete the old medication from the database as described immediately below.

DELETING A MEDICATION

The more closely your Personal Medications Database reflects the medications you prescribe, the easier it will be use Auto-complete. Any medication that you do not use should
be removed from your Personal Medications Database. Should you decide to use it, it can always be added.

For example, if you never prescribe AZITHROMYCIN, it should not be on then when you write an a you don’t want ZITHROMYCIN to be filled in.

To delete medications from your personal medication database, open **Edit Medication**.

Open the pull-down menus and choose **Modify Medication DB**. The page that appears contains a list of all the medications in your personal database.

Choose a **Med** to remove.

Select **Delete Med**. Repeat the process until you have removed all the medications you wish.

Once you are satisfied with the medications in the database, tap **OK**.

**AUTOMATICALLY UPDATING THE MEDICATIONS DATABASE**

Updating the Medications Database automatically each time a medication that PatientKeeper Personal does not recognize is entered ensures that the most recently used dose/ route/ schedule information for any medications will be recorded and that the Medications Database will be updated and customized effortlessly.

Go to **Medications** (not Edit Medications).

Choose the **Medication Preferences Panel**

Check **Automatically update Meds DB** to active it. An asterisk (*) will appear next to the Update DB button on the Edit Medications page.

**THE DOSE AND UNITS FIELDS**

The dose and units fields can be filled in three ways: (1) with the auto-fill feature described above; (2) with Graffiti; or (3) from a standard popup list that appears when **Dose** or **Units** are tapped. To have mg automatically placed in the units field, go to the **Medications Preferences Panel** and choose it.
THE MEDICATION ROUTE

Push-buttons are used to provide the most common routes of medication administration. Tap the push-button that contains the route that will be used for a new medication.

To have PO or blank appear by default for all new medications open the Medications Preferences Panel and make the appropriate selections.

If the route of medication is not available with these push-buttons, choose the blank push-button located at the far right of the medication route push-buttons.

Enter the route as the first part of the Schedule. When this medication is printed, the route will appear just before the schedule.

SCHEDULED OR PRN

If a medication is scheduled, tap the Scheduled Medication push-button. Nothing will appear at the end of the medication listing.

Use Graffiti to place Scheduled at the end of the listing. (This may be necessary if a medicine that is ordinarily used on a PRN basis is going to be scheduled.)

Tap the PRN push-button if it is to be given as needed. PRN will follow the medication listing.

THE SCHEDULE FIELD

There are four ways to enter a Medication Schedule: (1) use Graffiti; (2) choose from the standard popup list that appears Schedule is tapped; (3) use the auto-fill feature described above; and (4) use the Schedule Quick-Text buttons. For further information, see The Quick Text Buttons, earlier in this manual.

In addition to the standard Quick-Text buttons, the schedule has a special quick-text button, the Q-hour Selector used to designate a schedule rapidly.

Use the left or right arrows adjacent to the quick-text button q1 to choose the exact number of hours that are required between doses.

Tap the button. The text will appear in the Schedule field.
**The Medication Class**

Tap the **Class picker** to choose a category in which to place a medication.

PatientKeeper Personal allows up to 13 categories. These may be chosen from the group that comes with the application or they may be created.

**The Start and Stop Date**

Medications may be given **Start and Stop Dates** or they may be Chronic.

**Start and Stop Dates**

Medications assigned to a patient on the Medications page are given **today** as a start date automatically.

To choose a Stop Date, use the handheld calendar.

Alternatively, tap the **Stop Date Selector picker**. A list of options will be displayed.

Tap one to have PatientKeeper Personal calculate the number of days that a patient has been taking the medication automatically.

**Chronic**

Medications assigned to a patient from H&P (History and Physical) will be categorized as Chronic automatically.

To make a medication chronic, tap the **Start Date picker**. Tap **Chronic**.

**Holding or Discontinuing a Medication**

Check the **Held checkbox** to mark a medication **Held**. The medication will have a dashed line through it when Medications is opened.

Check the **DC checkbox** to mark a medication **Discontinued**. The medication will have a solid line through it when Medications is opened.

Discontinued meds are not included in reports unless the record is marked for printing with the printer icon. See **Standard Edit Functions, The Printer Icon**, below, for further information.
HOME AND/OR HOSPITAL

Medications may be marked as Home, Hospital or both. Reports may be set up to include all for all active meds (home or hospital) for medications taken at home only.

Medications that are created with H&P (History & Physical) default to Home.

Medications that are created on the Medications Page default to Hospital.

STANDARD EDIT FUNCTIONS

THE PRINTER ICON

The printer icon is used to include or exclude medications in a printed report. It may be turned on to include a medication that has been discontinued in a report or turned off to exclude a medication.

Go to Print Options.

Choose None.

Select Also Include All Tagged Records. Only records that are tagged because the printer icon has been highlighted will be printed.

ADD TO EVENT LOG

Tap the Add to Log Icon to add a medication to the Event Log automatically.

For example, a significant event in a stroke patient’s stay may be when he/she is given a thrombolytic. Tap the icon to add the thrombolytic to the event log as a reminder when you dictate or summarize the significant events of this patient’s stay.

THE SCROLL ARROWS

Scroll between medications for a patient using the scroll arrows at the top of the screen.
The Procedure List is used to see the procedures a patient has undergone, the date on which it was performed and the post procedure day number.

Tap New at the bottom right of the screen to create a procedure.

Tap a procedure to select it. Edit Procedure will be displayed.

As on all pages, the patient’s name is in the top right corner of the page, and the navigation bar is visible at the bottom of the page. Switch between patients by tapping on the patient’s name at the top right and choosing from the list of patients that appears. Use the navigation bar at the bottom of the screen to jump to any other part of PatientKeeper Personal with the navigation bar at the bottom of the screen.
**EDIT PROCEDURE**

Edit Procedure is used to create and modify existing patient's procedure list.

**DATE AND TIME FIELDS**

Tap the **Date** box to open an area where the date on which the procedure took place can be entered.

Tap the **Time** box to display an area where the time at which the procedure took place can be entered.

**THE PROCEDURE FIELD**

Procedure can be filled out in two ways: (1) writing the procedure with Graffiti; (2) selecting the procedure from pop-up lists.

To select a procedure from a pop-up list, tap **Procedure**. A pop-up window with major medical systems will appear.

Tap an area, such as cardiology, to display a list of procedures appropriate to it. Select the procedure that was performed.

Select **Edit** to modify any of the lists so they meet your needs.
PERFORM BY

Perform By can be filled out in two ways: (1) writing the person’s name with Graffiti or the alphabetical keyboard; or (2) selecting the name from pop-up lists.

To select a procedure from a pop-up list, tap Perform By. A pop-up window with names will appear. Select the appropriate name.

Select Edit to modify any of the lists so they meet your needs.

ROLE

Role can be filled out in two ways: (1) writing the person’s name with Graffiti; (2) selecting the role from pop-up lists.

To select a procedure from a pop-up list, tap Role. A pop-up window with roles will appear. Select the appropriate role.

Select Edit to modify any of the lists so they meet your needs.

COMPLICATION

Complication can be filled out in two ways: (1) writing the complication with Graffiti; (2) selecting the complication from pop-up lists.

To select a procedure from a pop-up list, tap Complication. A pop-up window with complications will appear. Select the appropriate complication.

Select Edit to modify any of the lists so they meet your needs.

THE NOTE FIELD

Complication can be filled out in two ways: (1) writing the note with Graffiti; (2) selecting phrases for the note from pop-up lists.

To select a procedure from a pop-up list, tap Note. A pop-up window with phrases will appear. Select the appropriate phrase.

Select Edit to modify any of the lists so they meet your needs.
PROCEDURE FOR POD CALC

Fill out the **Use This Procedure for POD calc checkbox** so that the procedure will appear in a report as a POD calculation.
**PROBLEMS**

Problems consists of a list of all a patient’s problems listed from one to five. One is the most serious and five is the least serious. Zero, discussed below, means that the item is no longer a problem.

Tap **New** at the bottom right of the screen to enter a new problem.

Tap a **problem** to select it. **Edit Problem** will be displayed.

To change a priority level, tap on the **number** to the left of a problem. A pop-up list will be displayed. Choose a number between one (the most serious) and five (the least serious).

As on all pages, the patient’s name is in the top right corner of the page, and the navigation bar is visible at the bottom of the page. Switch between patients by tapping on the patient’s name at the top right and choosing from the list of patients that appears. Use the navigation bar at the bottom of the screen to jump to any other part of PatientKeeper Personal with the navigation bar at the bottom of the screen.
THE PROBLEM PREFERENCES PANEL

Open the pull down menus. Tap **Options**. Then tap **Preferences**.

**Creating A Default Priority**

One, two and three may be used as default priorities. If a default priority has been designated, it will appear whenever a new problem is added.

To change a priority level, tap on the **number** to the left of a problem. A pop-up list will be displayed. Choose a number between one (the most serious) and five (the least serious).

**Giving A Zero Priority**

Using Zero for the priority indicates that the problem no longer exists.
EDIT PROBLEM

Edit Problem is used to create and modify existing patient's problem list.

THE PROBLEM FIELD

Information may be recorded in two ways: (1) using Graffiti to enter the problem; and (2) selecting it for a pop-up list.

- Tap Problem. A pop-up window containing major medical systems will be displayed.
- Tap a complaint category, as for example, cardiopulmonary. A list of complaints will appear. Choose the appropriate complaint.
- Select Edit to modify any of the lists so they meet your needs.

THE PRIORITY FIELD

Tap the Priority picker to choose a priority level. Priority Levels may range from zero to five.

- Zero means that the problem no longer exists.
- One is the most serious.
- Five is the least serious.

THE TYPE FIELD

Tap the Type picker. Select Chronic or Acute.
THE PLAN FIELD

To add a new plan for the Problem, tap **New Plan** in the bottom right corner of the screen. Graffiti may be used to write a plan.

Alternatively, tap abc to open an alphabetical keyboard and type the plan.

Tap the **date** to open Edit Plan.

Tap **To Do** to place the plan on your To Do List.
To open H&P (History & Physical) by going to the Main Page and tap H&P. H&P is used to enter a patient’s history and physical. This page is divided into three main parts: Hx, PE and A/P, seen at the top of the page.

**Hx**

Hx (History) contains the following tabs: CC, HPI, PMH, PSH, Med, All, FH, SH and ROS. All of these are used to add information pertaining to the History.

**CC**

CC is used to record a patient’s major complaint. It may be entered in three ways: (1) by tapping Dx to place the diagnosis on the Edit Patient page; (2) using Graffiti or the keyboard to enter the CC directly; and (3) selecting the CC from pop-up lists.

To select a CC from pop-up lists, tap CC. A pop-up containing major medical systems will be displayed.
Tap a **complaint category**, as for example, cardiopulmonary. A list of complaints will appear. Choose the appropriate complaint.

Select **Edit** to modify any of the lists so they meet your needs.

**HPI**

The HPI is recorded here. To place a default phrase such as "Mr. Doe is a 25 year old white male who presents with..." on the Edit Patient Page, tap Auto. Complete the sentence by: (1) using Graffiti; (2) using the alphabetical keyboard; or (3) choosing common phrases and terms from the HPI pop-up list.

To open the HPI pop-up list, tap **HPI**.

Select **Edit** to modify any of the lists so they meet your needs.

**PMH**

PMH information may be entered by: (1) tapping plus or minus on the left side and then tapping one of the seven icons for various diseases; (2) writing it directly with Graffiti or the alphabetical keyboard; or (3) selecting it from pop-up lists.

Tap **PMH** to open a pop-up window containing a list of major medical systems.

Tap a **category** such as cardiopulmonary. A list of cardiopulmonary diseases will appear. Choose the appropriate disease.

Select **Edit** to modify any of the lists so they meet your needs.

**PSH**

PSH information may be inserted by: (1) tapping plus or minus on the left side and then tapping one of the seven icons for various diseases; (2) writing it directly with Graffiti or the alphabetical keyboard; or (3) selecting it from pop-up lists.

Tap **PSH** to open a pop-up window containing a list of major medical systems.

Tap a **category** such as cardiopulmonary. A list of cardiopulmonary diseases will appear. Choose the appropriate disease.

Select **Edit** to modify any of the lists so they meet your needs.
**Med**

Tap Med to open the Medications page. Consult Medication, earlier in this manual for detailed information.

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**All (Allergies)**

All (Allergies) FH (Family History) and SH (Social History) are entered on the same screen.

Enter the allergy by: (1) writing it in with Graffiti or the alphabetical keyboard; or (2) by selecting it from a pop-up list.

- Tap the **All picker** to open a pop-up list. Select an allergy.
- Tap the **NKDA box** if the patient has no known allergies.
- Select **Edit** to modify any of the lists so they meet your needs.

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**FH**

All (Allergies) FH (Family History) and SH (Social History) are entered on the same screen. Enter the patient’s family history by: (1) tapping plus or minus on the left side and then tapping one of the five history icons; (2) writing it directly with Graffiti or the alphabetical keyboard; or (3) selecting it from pop-up lists.

- To open a pop-up window, tap **FH**. A pop-up window with a list of common family history will be displayed. Choose the desired history.
- Select **Edit** to modify any of the lists so they meet your needs.

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**SH**

All (Allergies) FH (Family History) and SH (Social History) are entered on the same screen. Enter the patient’s social history by: (1) tapping plus or minus on the left side and then tapping one of the five history icons; (2) writing it directly with Graffiti or the alphabetical keyboard; or (3) selecting it from pop-up lists.

- To open a pop-up window, tap **SH**. A pop-up window with a list of common social histories will be displayed. Choose the desired history.
- Select **Edit** to modify any of the lists so they meet your needs.
**ROS**

Tap Notes to open Notes and enter information. To see a ROS list, tap the down arrow. A pop-up list with various groups will be displayed. Choose ROS. Tap any of the symptoms.

Choose **Y** for Yes, **N** for No or **?** for unknown.

Select **Edit** to modify any of the lists so they meet your needs. **The ROS list may contain a total of 12 symptoms.**

**PE**

Tap the second tab on the H&P main page to open the PE (Physical Exam) page. It is divided into three sub-pages by either using the left or right arrows at the bottom of the screen or by tapping one, two or three. To this: (1) tap one of the three icons for common phrases next to each heading; (2) use Graffiti to write the PE; or (3) tap any of the system heading to select common PE phrases from pop-up lists.

If any PE is more than two lines long, a scroll bar will appear on the right hand side of the screen.
Select **Edit** to modify any of the lists so they meet your needs.

**Vitals**

To open Vitals, tap the **Vitals Icon**.

- Tap **Most Recent** to see the latest entry.
- Tap **New** to create a new entry.

**A/P**

**A/ P**, the third tab on the main H & P page, opens the assessment/ plan page.

![A/P example image]

**A (Assessment)**

The Patient Assessment may be entered by: (1) writing it directly; or (2) selecting phrases from a pop-up window.

- Tap the letter **A**. A pop-up window with a list of common phrases will appear. Choose the desired phrase.

Select **Edit** to modify any of the list so they meet your needs.
**P (Plan)**

The Patient Plan may be entered by: (1) writing it directly; or (2) selecting phrases from a pop-up window.

Tap the letter **P**. A pop-up window with a list of common phrases will appear. Choose the desired phrase.

Select **Edit** to modify any of the lists so they meet your needs.
SOAP NOTE

To display a list of SOAP Notes tap the SOAP Note header at the top of the screen. Tap a Note to select it.

Tap **New**, at the bottom right of the screen to create a new note.

If a SOAP Note has been entered already, you will be asked if you wish to use it as a template. Tap **Yes** to select it. Tap **No** to create an note that is not based upon a template.

Tap **Delete**, at the bottom right of the screen to delete the SOAP Note which appears on the screen.

To scroll between lines for each field, use the **scroll bar** at the right hand side of the screen.

As on all pages, the patient's name is in the top right corner of the page, and the navigation bar is visible at the bottom of the page. Switch between patients by tapping on the patient's name at the top right and choosing from the list of patients that appears. Use the navigation bar at the bottom of the screen to jump to any other part of PatientKeeper Personal with the navigation bar at the bottom of the screen.
DATE AND TIME FIELDS

Tap the **Date** box to open an area where the date on which the procedure took place can be entered.

Tap the **Time** box to display an area where the time at which the procedure took place can be entered.

THE S (SUBJECTIVE) FIELD

The subjective portion of the SOAP note may be entered by: (1) writing it directly with Graffiti or the alphabetical keyboard; or (2) selecting assessment phrases from pop-up lists.

To open a pop-up list, tap **S**. A pop-up window with a list of common phrases will be displayed. Choose one.

Select **Edit** to modify any of the lists so they meet your needs.

THE O (OBJECTIVE) FIELD

Enter information for the Objective portion of the SOAP analysis by: (1) writing it directly using Graffiti or the alphabetical keyboard; or (2) selecting from pop-up lists.

To open a pop-up list, tap **O**. A pop-up window with a list of common phrases will be displayed. Choose one.

Select **Edit** to modify any of the lists so they meet your needs.

PE

Tap **PE** to open the physical exam page that is part of H&P (History & Physical).

THE A (ASSESSMENT) FIELD

Assessments may be created by: (1) writing them with Graffiti or the alphabetical keyboard; or (2) selecting assessment phrases from pop-up lists.

To open a pop-up list, tap **A**. A pop-up window with a list of common phrases will be displayed. Choose one.

Select **Edit** to modify any of the lists so they meet your needs.
THE P (PLAN) FIELD

The Plan may be created by: (1) writing it with Graffiti or the alphabetical keyboard; or (2) selecting phrases from pop-up lists.

To open a pop-up list, tap P. A pop-up window with a list of common phrases will be displayed. Choose one.

Select Edit to modify any of the lists so they meet your needs.
**Other Info**

Other Info contains material that is not covered elsewhere by PatientKeeper Personal. It includes data about the primary physician, the consulting physician, medical team taking care of the patient, cross cover team, the patient’s code status, check-boxes for dictations and fever work-up instructions for cross-cover.

As on all pages, the patient’s name is in the top right corner of the page, and the navigation bar is visible at the bottom of the page. Switch between patients by tapping on the patient’s name at the top right and choosing from the list of patients that appears. Use the navigation bar at the bottom of the screen to jump to any other part of PatientKeeper Personal with the navigation bar at the bottom of the screen.

**The Primary Field**

Use the Primary field to enter the name of the primary physician. The primary field may be field in by: (1) writing the physician's name with Graffiti or the alphabetical keyboard; or (2) selecting it from pop-up lists.

To open a pop-up list, tap **Primary**. A list of names will appear. Choose the desired name.

Select **Edit** to modify any of the lists so they meet your needs.
THE CONSULT FIELD

Use the consult field to record the consulting physician’s name. The field may be completed by: (1) writing in the name with Graffiti or the alphabetical keyboard; or (2) selecting it from pop-up lists.

To open a pop-up list, tap Consult. A list of names will appear. Choose the desired name.

Select Edit to modify any of the lists so they meet your needs.

THE TEAM FIELD

Fill in the patient’s team by: (1) entering it with Graffiti or the alphabetical keyboard; or (2) selecting it from pop-up lists.

To open a pop-up list, tap Team. A list of names will appear. Choose the desired names.

Select Edit to modify any of the lists so they meet your needs.

THE X-COVER FIELD

The X-Cover field can be filled by: (1) entering it with Graffiti or the alphabetical keyboard; or (2) selecting it from pop-up lists.

To open a pop-up list, tap X-Cover. A list of names will appear. Choose the desired names.

Select Edit to modify any of the lists so they meet your needs.

THE CODE FIELD

The code field can be filled by: (1) entering it with Graffiti or the alphabetical keyboard; or (2) selecting it from pop-up lists.

To open a pop-up list, tap Code. A code status list will appear. Choose the desired code status.

Select Edit to modify any of the lists so they meet your needs.
THE DICTATION FIELD

Use the checkboxes next to H & P and/ or D / C dictations to show whether or not they have been completed. A check means completion; an unfilled box indicates lack of completion.

THE BLOOD CULTURE FIELD

The Blood Culture field is used to tell the cross-cover team whether or not a blood culture is warranted if a patients develops a fever.

THE T> FIELD

The T> field is used to identify the temperature at which a fever work-up should be done.

NOTES

Notes can be used for any notations. It is particularly helpful for items such as whether or not to obtain a chest x-ray and urine culture if a patient spikes a fever. It can be filled in by: (1) entering it with Graffiti or the alphabetical keyboard; or (2) selecting it from pop-up lists.

To open a pop-up list, tap Notes. A list of phrases will appear. Choose the desired phrase.

Select Edit to modify any of the lists so they meet your needs.
**EVENT LOG**

The event log page is used to log any events about a patient that you deem necessary. The log also contains information on the date, event and how many days into the hospital stay it occurred.

Tap **New**, on the bottom right corner of the screen to enter a new event.

Tap an **existing event** to open **Edit Log**.

As on all pages, the patient’s name is in the top right corner of the page, and the navigation bar is visible at the bottom of the page. Switch between patients by tapping on the patient’s name at the top right and choosing from the list of patients that appears. Use the navigation bar at the bottom of the screen to jump to any other part of PatientKeeper Personal with the navigation bar at the bottom of the screen.
EDIT LOG

Edit Log is used to create a new patient’s even log or modify one that already exists.

DATE AND TIME FIELDS

Tap the **Date** box to open an area where the date on which the procedure took place can be entered.

Tap the **Time** box to display an area where the time at which the procedure took place can be entered.

THE ITEM FIELD

The Item field is used to enter the log. It may be done by: (1) entering it with Graffiti or the alphabetical keyboard; or (2) selecting it from pop-up lists.

To open a pop-up list, tap **Item**. A list of logs will appear. Choose the desired log.

Select **Edit** to modify any of the lists so they meet your needs.
The notes page is used to log any note about a patient that you deem necessary. The note contains a check-box, the note and date.

Tap **New**, in the bottom right corner of the screen, to create a Note.

Tap **Detail** immediately below **New**, to open **Edit Log**.

As on all pages, the patient's name is in the top right corner of the page, and the navigation bar is visible at the bottom of the page. Switch between patients by tapping on the patient's name at the top right and choosing from the list of patients that appears. Use the navigation bar at the bottom of the screen to jump to any other part of PatientKeeper Personal with the navigation bar at the bottom of the screen.
EDIT NOTES

The Edit Notes Page is used to modify existing notes.

THE DATE FIELD

Tap the Date box to open an area where the date on which the procedure took place can be entered.

THE ITEM FIELD

The Item field is used to enter the log. It may be done by: (1) entering it with Graffiti or the alphabetical keyboard; or (2) selecting it from pop-up lists.

To open a pop-up list, tap Item. A list of logs will appear. Choose the desired log.

Select Edit to modify any of the lists so they meet your needs.
**To Do**

To Do is a list of things that need to be done for a patient. Each item contains a check box as well as the date. Labs which are pending are placed on the To Do List automatically.

Tap **New**, in the bottom right corner of the screen, to create a Note.

Tap **Detail** immediately below New, to open Edit Log.

As on all pages, the patient’s name is in the top right corner of the page, and the navigation bar is visible at the bottom of the page. Switch between patients by tapping on the patient’s name at the top right and choosing from the list of patients that appears. Use the navigation bar at the bottom of the screen to jump to any other part of PatientKeeper Personal with the navigation bar at the bottom of the screen.
**Edit To Do Item**

Edit To Do Item is used to modify existing notes.

**The Due Date Field**

Tap the **Due Date** to open a screen where the date may be entered.

**The Due Time Field**

Tap the **Due Time box** to open a screen where the time that the item is due may be listed.

**The Alarm Field**

Tap **On** to set an alarm that will remind you to complete the listed task. Tap **Off** to turn it off.
THE ITEM FIELD

The Item Field may be completed by: (1) entering it with Graffiti or the alphabetical keyboard; or (2) selecting it from pop-up lists.

To open a pop-up list, tap Item. A list of tasks will appear. Choose the desired task.

Select Edit to modify any of the lists so they meet your needs.

THE CHECK OUT BOX

Fill in the Check Out Box to place the To Do Item on the check out list when the Output Checkout List function is chosen.
You can use PatientKeeper Personal to generate chart-ready notes and reports. The reports that can be generated are:

- History and Physical
- Daily Progress Note
- Patient List/Checkout List
- List of records from any page
- Individual record from any page

Reports may be sent to one of three places: (1) directly to a printer if PalmPrint is available; (2) to a new memo in the built-in MemoPad; and (3) to an email in the built-in Mail Application.

To print a report from your PC, choose **Create a Memo**.

**HotSync** to send the material from the handheld device to your PC. **Print**.

Optional Information may be included in both the History and Physical and the Progress Notes. If optional information has been included, a special Print Options Panel will be displayed when you choose to print, so that the information that is to be included in the report may be selected.

**Generating a History and Physical Report**

Once H&P information has been completed, go to the **Main Page** or to the **H&P File Menu**.

Select the **Reports Menu**.
Choose **Output H&P**. The Print Options box will appear.

Go to **Note**. Select **History and Physical**.

Generate the report by choosing the appropriate button at the bottom of the screen.

**GENERATING A PROGRESS (SOAP) NOTE**

A report based upon a SOAP Note may be generated from the Main Page or from the SOAP Page.

**Using The Main Page**

Go to the **Main Page**. Choose the **Reports Menu**.

Select **Output SOAP Note**. The Print Options Box will be displayed; its default is **Most Recent**.

To choose a **different date**, tap the Note heading.

Choose the appropriate options and then generate the report by choosing the appropriate button at the bottom of the screen.

**Using The SOAP Page**

Go to the **SOAP Page**. Choose the **Output Menu**.

Select **Output SOAP Note**. The Print Options Box will be displayed; its default is **Most Recent**.

To print a different note, tap **Note**, located at the top of the panel. A list of SOAP Note dates will be displayed.

Choose the **date** of the Note that is to be printed. It will be displayed in the Print Options Panel.

Generate the report by choosing the appropriate button at the bottom of the screen.
PRINT OPTIONS

PatientKeeper Personal is very flexible; most information may be included in any generated note. The Print Options dialog box is available for SOAP notes and History and Physicals only.

NOTE

The Print Options Panel appears either because a SOAP Note is being created or because History and Physical is being created.

If the Print Options Panel has been opened because a SOAP Note was created, it will contain its default, Most Recent.

To print a different note, tap Note, located at the top of the panel. A list of SOAP Note dates will be displayed.

Choose the date of the Note that is to be printed. It will be displayed in the Print Options Panel.

If you have reached the Print Options Panel by choosing Output H&P, the Print Options Panel will contain History and Physical; it cannot be changed.

INCLUDE HEADER AND INCLUDE FOOTER

Choose Include Header and/ or Include Footer to create headers and footers.

To edit, go to the Main Page.

Select the Reports Menu. Choose Edit Header and Footer.
**INCLUDE HD# AND INCLUDE POD#**

Choose these options to have the hospital day number, calculated as the number of days since the admission date, and/ or the post-operative day, calculated as the number of days since the procedure, (designated **Use for POD calculation**) appear.

**INCLUDE Dx**

Choose this option to include the Admission Diagnosis, found on the Edit Patient Page, at the top of the note.

**INCLUDE TODAY'S VITALS**

Choose this option to include the **current** day's vital signs in your note, just prior to the physical exam. Other Vital Signs may only be included by using the Printer Tag option described below.

**INCLUDE TODAY'S LABS/ TESTS**

Select this option to include the **current** day's lab and test results. Other results may only be included by using the Printer Tag option described below.

**MEDICATIONS**

This option is used to determine whether: (1) all of the patient's active medications; (2) only the patient's home medications; or (3) none of the patient's (untagged) medications will be included in the note.

   **If a medication has a printer tag that is active and the Also include all tagged records checkbox has been chosen, printing will occur even if None has been selected.**

**INCLUDE PROBLEMS AND PLANS**

Include Problems and Plans should be used to include material after the Assessment and Plan have been created, or, in lieu of them if they are blank. The material may consist of all plans associated with each problem or today's plans only.

   **If only today's plans are used, those plans that have a printer tag that is active and the Also include all tagged records checkbox chosen, will be printed.**
** ALSO INCLUDE ALL TAGGED RECORDS **

Choose this option to print any record that has the printer tag activated on it. The choice will override any other options that have been chosen thus providing flexibility to include any, all, or none of the patient’s records in the note that is generated.

** THE PRINTER TAG **

The Printer Tag — a small Printer Icon — may be added when a record is created on the Main Preferences Panel or it may be marked on most Edit Pages. On the latter, it is located at the bottom of the screen next to the OK and Delete buttons.

*If the Printer Icon and the Also Include all tagged records checkbox are selected, the record will be printed irrespective of any other choices made.*

<table>
<thead>
<tr>
<th>EDIT PAGES CONTAINING PRINTER TAGS</th>
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</thead>
<tbody>
<tr>
<td>Edit Vitals</td>
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<td>Edit Cardiac</td>
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<td>Edit Urine Chem</td>
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<td>Edit Medications</td>
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<td>Edit Hematology</td>
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<td>Edit Tests</td>
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<td>Edit Chemistry</td>
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<td>Edit Other Labs</td>
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<td>Edit Problems</td>
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<td>Edit Coagulation</td>
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<td>Edit UA</td>
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<td>Edit Imaging</td>
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<tr>
<td>Edit Plans</td>
</tr>
</tbody>
</table>

** GENERATING REPORTS OF RECORDS **

Go to any lab, test, medication, problem or procedure page. Choose the **Output menu**.

Select **Print Record** to print the currently active record. Alternatively, choose **Print All Records** to print all the records on that page.

The output may be sent to a memo, e-mail or printer.

PalmPrint is required to send output to a printer to receive a printer.

** PRINTING DIRECTLY TO A PRINTER **

PalmPrint by Stevens Creek Software at [www.stevenscreek.com](http://www.stevenscreek.com), is required in order to print directly to a printer with PatientKeeper Personal. Two versions may be used.
The first, a full version, makes it possible to print from the MemoPad, the To-Do List, the clipboard, as well as from PatientKeeper Personal.

The second version, is discounted. It will only print PatientKeeper Personal reports.

Once PalmPrint has been obtained and installed, it will be possible to generate reports that can be printed directly from your Palm device to a printer via infra-red (IR), your Palm Cradle, or via a special adapter wire. Details about the ways to print with PalmPrint are available at the PalmPrint website.

Be sure to adjust the parameters in PalmPrint so that Reports look as professional as possible. For example, it is generally a good idea to use Landscape mode if a checkout list is being printed.