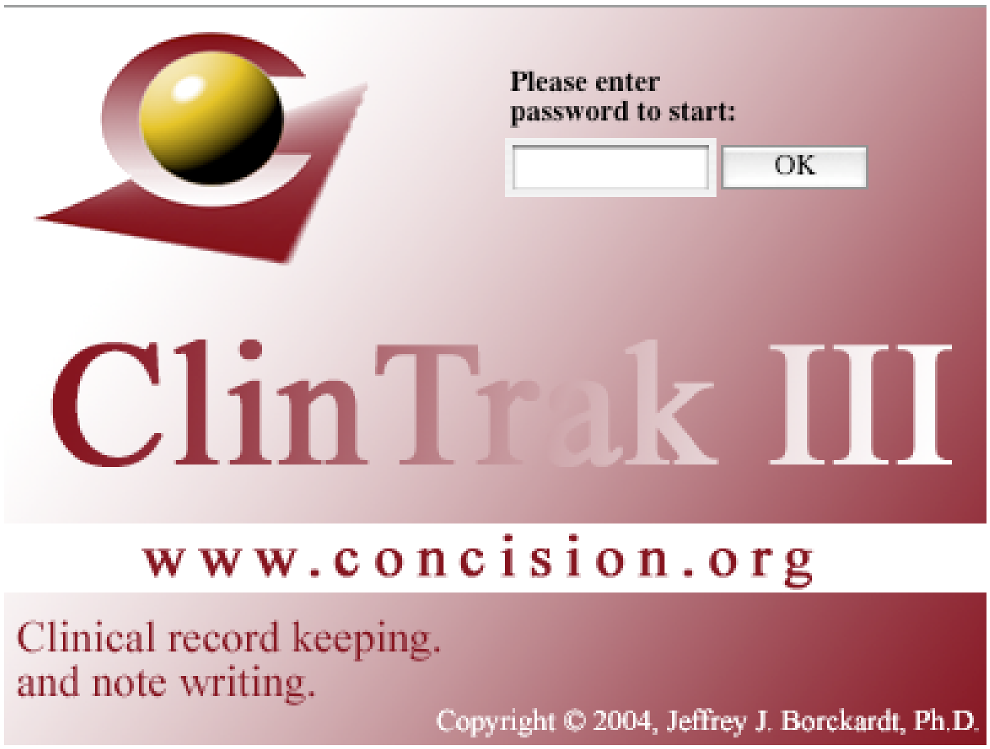


ClinTrak III

User's Guide

CONTENTS

INSTALLATION:

ClinTrak2 should already be installed on your computer at CAPS or the IOP.

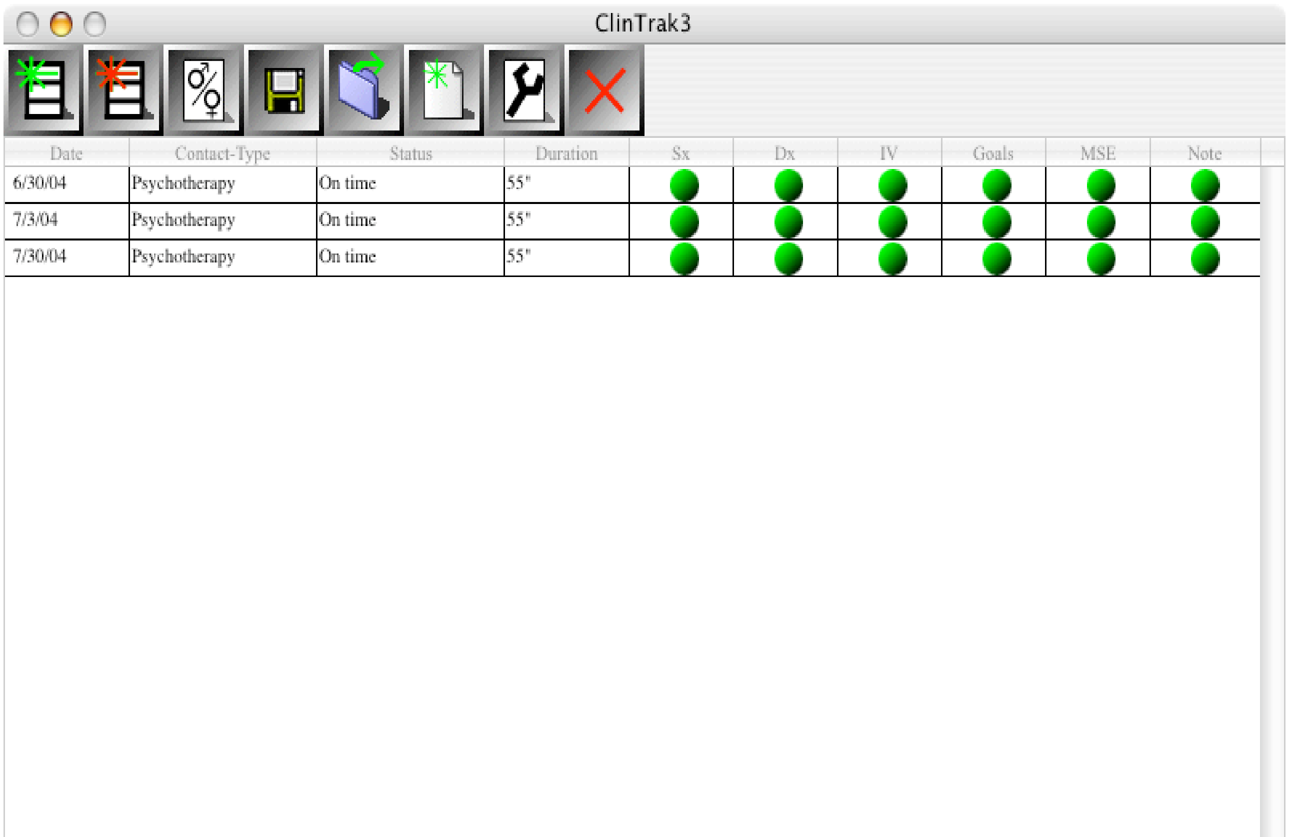
STARTING UP

Find the ClinTrak III Folder, open it and double click the ClinTrakIII icon. The program will start and display the title screen. The program can also be started by double-clicking on a ClinTrak file or by dragging a ClinTrak file onto the program's Icon.

SECURITY & PASSWORDS

The program requires users to enter a password to be able to access the ClinTrak program in order to prevent unauthorized personnel from accessing confidential files. The first time you run ClinTrak, the pass-word is "hello" (no quotes). After the program is open, you can change the password by clicking on the "wrench" button for preferences and then clicking on the "Enter new password" button. A small window will appear for you to enter the new password. Click OK and the new password is set. Do NOT forget your password or you will have to re-install ClinTrak from the Installation Disc.

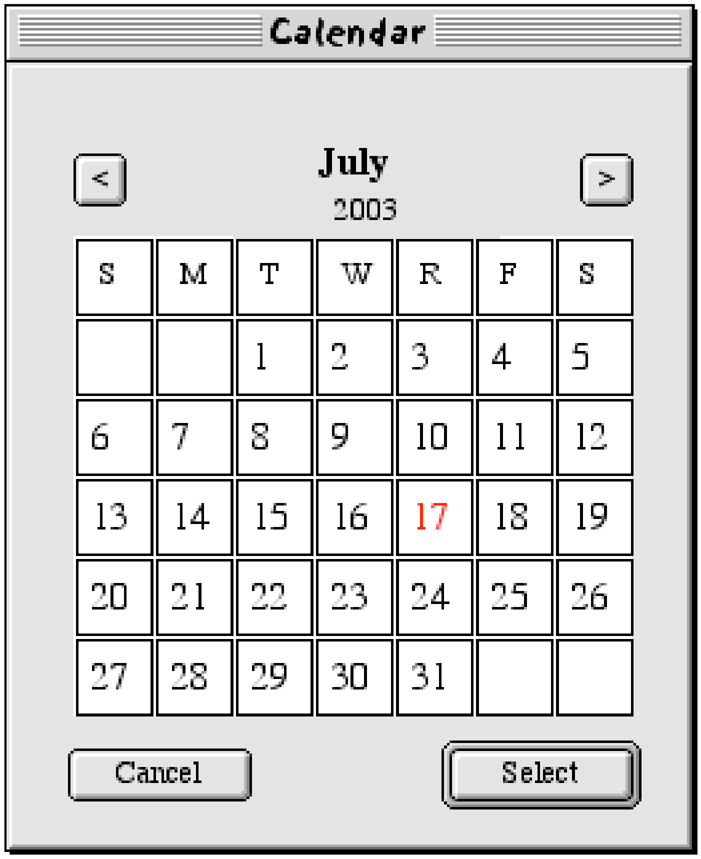
USING THE MAIN WINDOW



Before you can enter any information, you must 1) Open a pre-existing data file, 2) Start a new patient-file or 3) Add a row. When you move the mouse over the buttons at the top of the window, you can read what each one does in the space to the right of the buttons.

ADDING ROWS:

To add a row to a patient file, click on the button in the upper left hand corner of the window. After you do this, you will see the calendar window shown below. When the window appears, the current month and year are displayed and the current day is shown in red. If this is the date for which you wish to make an entry, click "Select" and this date will be entered into the "Date" field of the Main Window. If not, you can navigate forward and backward through the months using the arrow buttons at the top of the calendar window. To select a date, simply click on it. It will turn red to confirm the selected date. Click "Select" when you have selected the appropriate date.



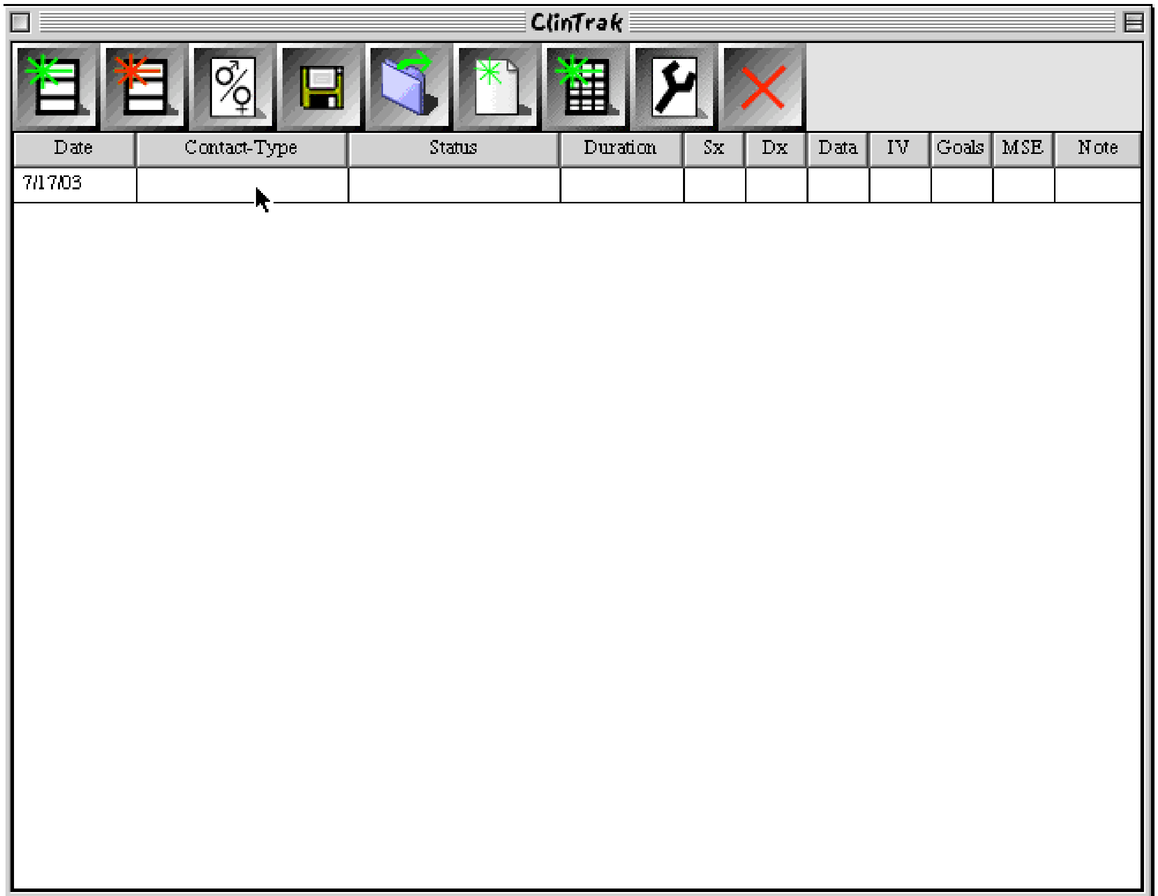
Once you have opened a file, started a new patient file or added a row, you should see a row of blank data fields that stretch across the length of the window underneath the column sub-headings starting with the date you selected from the calendar window.

CHANGING VALUES:

To change the value of any data field (including the date field), click on a data cell beneath the heading that represents the information you wish to modify. You will then be prompted with a window that is specifically designed for providing the information needed to fill-in the data field. See the picture below for an illustration.

DELETING ROWS

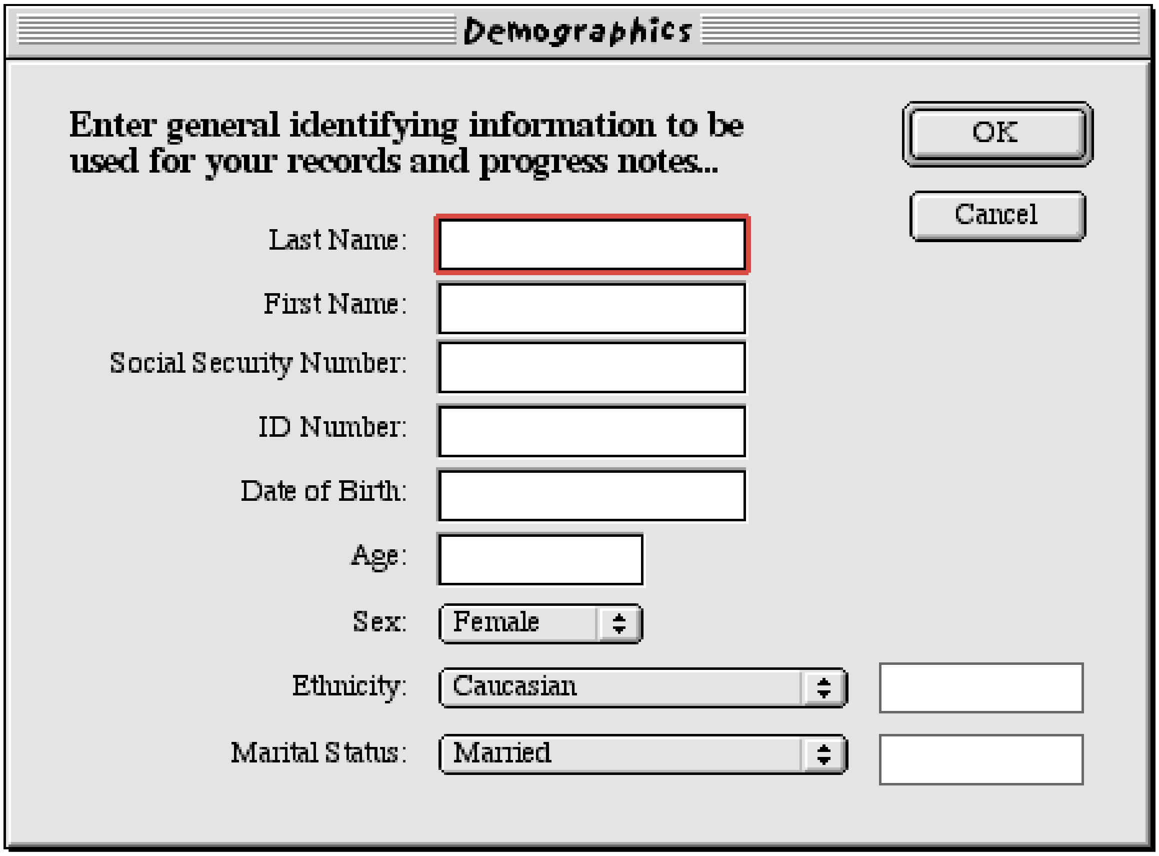
To delete a row, hold down the SHIFT key and click anywhere on the row you wish to delete. The row will then be highlighted. To delete it, click second button from the left at the top of the window.



In the picture above, the user is clicking on the "Contact-Type" data field to enter the contact type that corresponds with 7/17/03.

NEW CLIENTS

To start a new client file, click the New Patient button at the top of the Main Window. This will clear all of the existing rows and open the Demographics window. Fill-out the relevant demographics information and click OK. This information will be stored in the patient-file and can be easily accessed for progress-note writing.

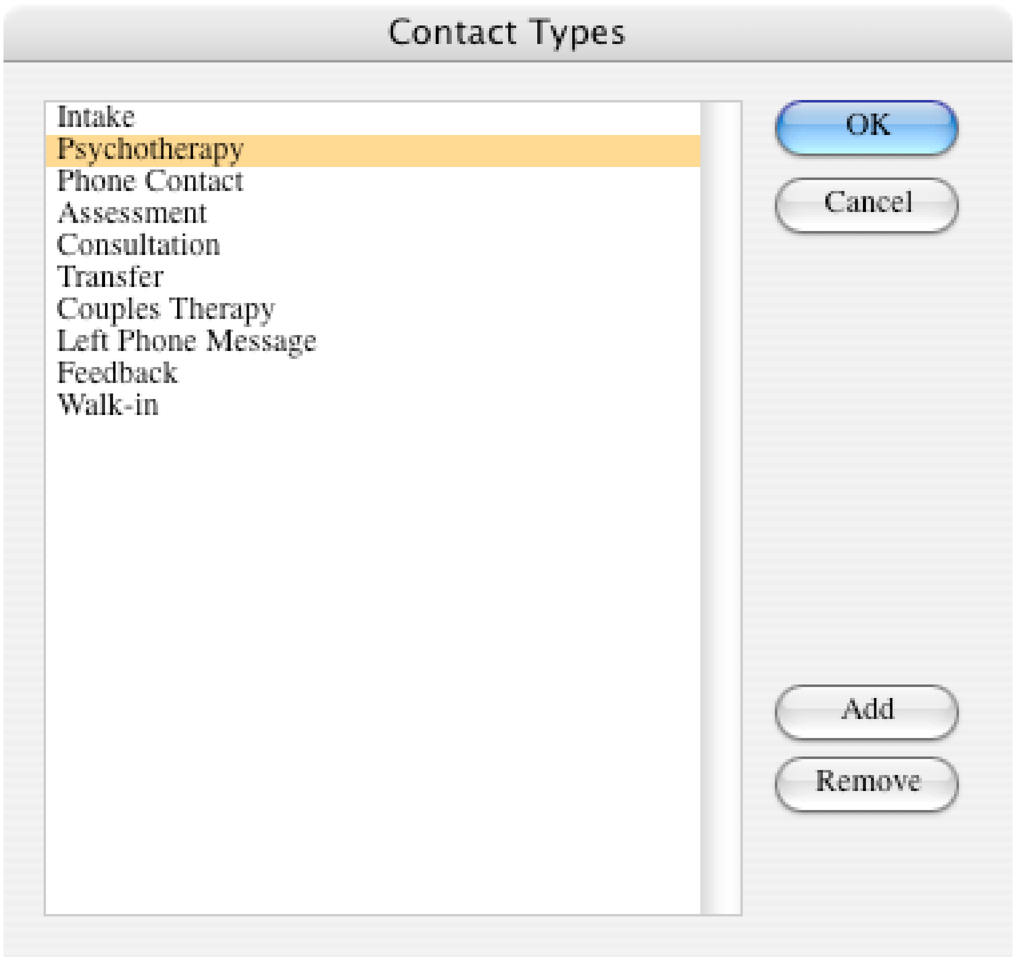


CHANGING DEMOGRAPHIC INFORMATION

This information can be accessed and changed at any time by clicking on the Demographics button at the top of the Main Window.

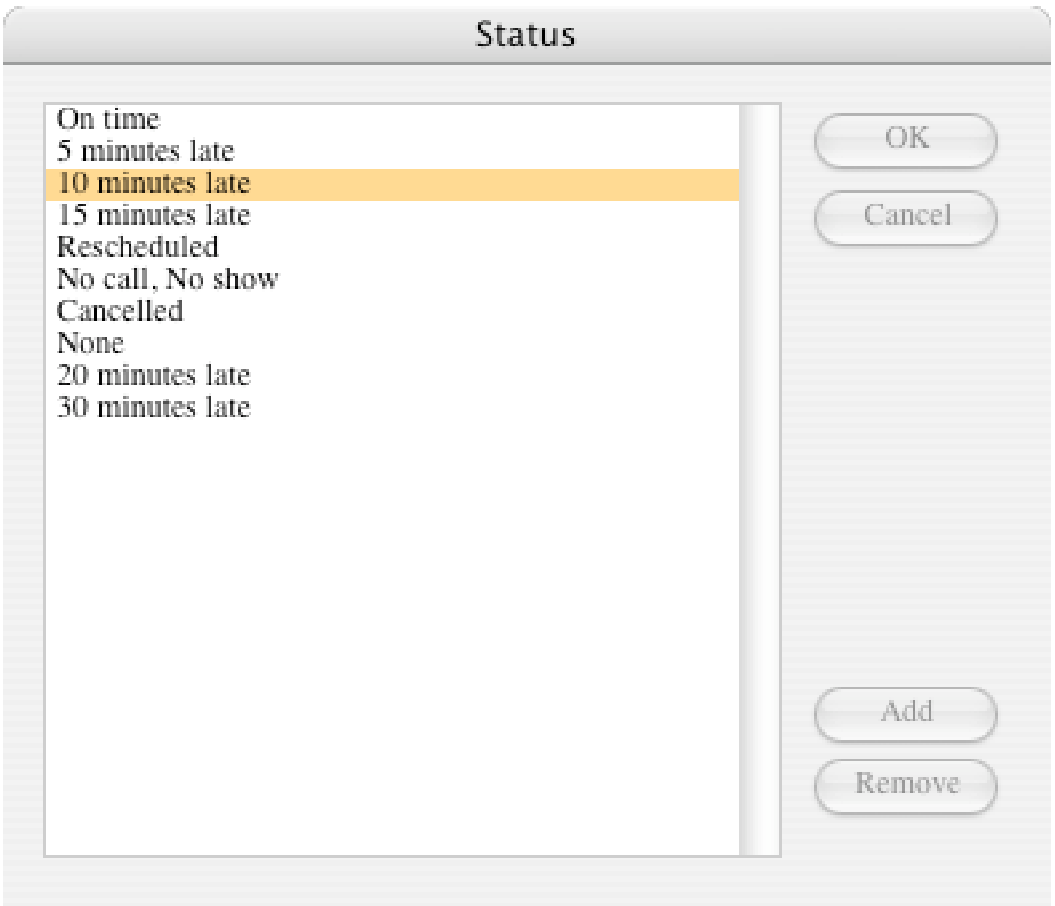
CONTACT TYPE

To change or set the type of contact for a specific date, click on the data cell under the Contact-Type heading in the row corresponding to the date you wish to edit. The Contact window will then be visible and you can change the contact-type by selecting the appropriate item from the list. You can add a contact-type to the list or remove one by clicking the "Add" or "Remove" buttons. Once you have selected the appropriate contact type, click OK and the information will appear in the Main Window data list.



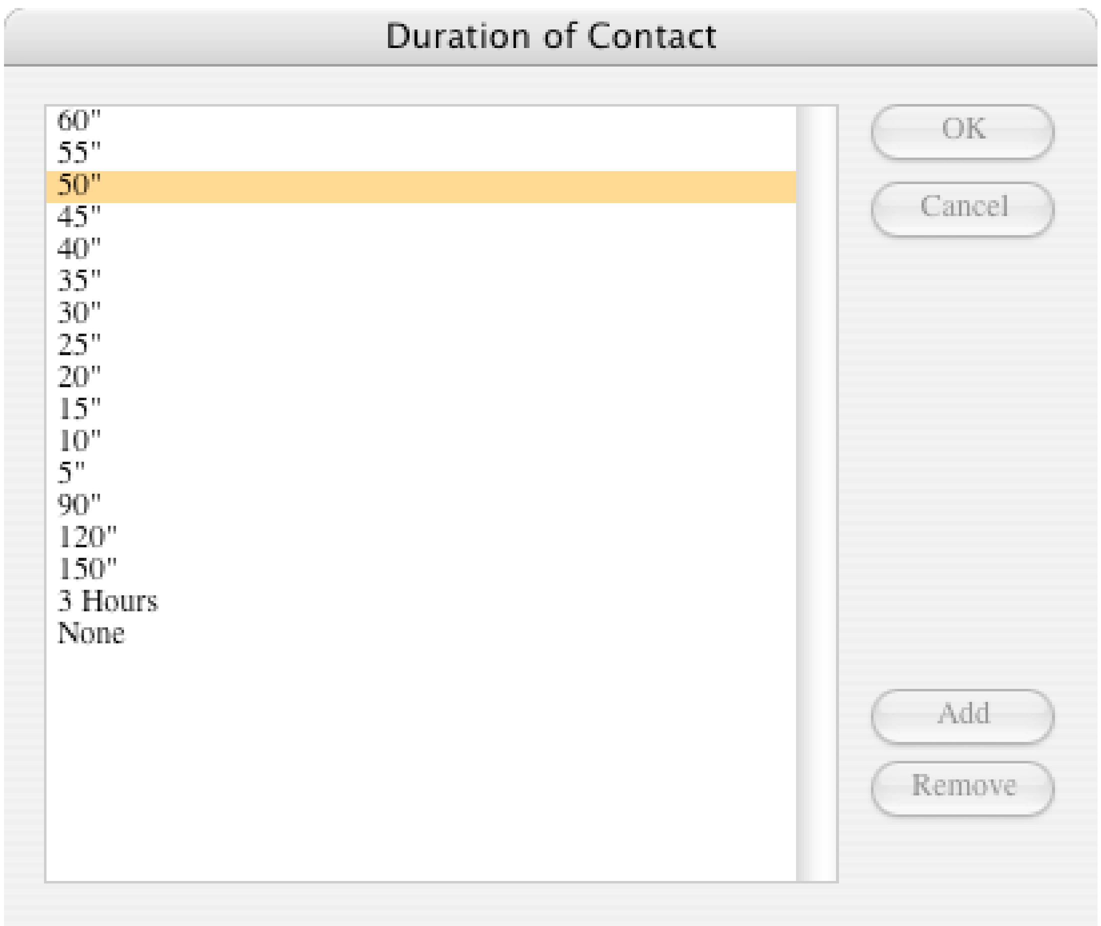
STATUS

To change or set the status of an appointment for a specific date, click on the data cell under the status heading in the row corresponding to the date you wish to edit. The Status window will then be visible and you can change the status by selecting the appropriate item from the list. You can add a status to the list or remove one by clicking the "Add" or "Remove" buttons. Once you have selected the appropriate status, click OK and the information will appear in the Main Window data list.



DURATION

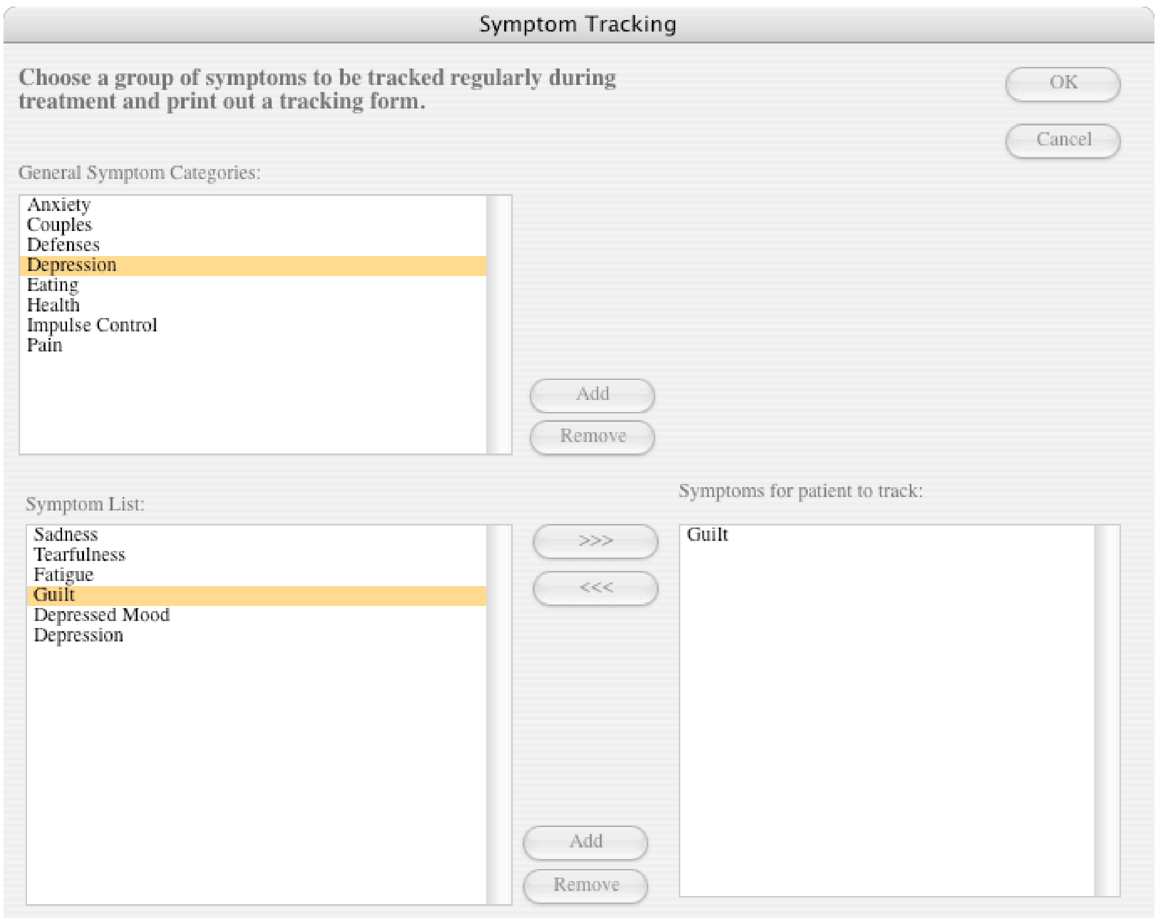
To change or set the duration of an contact for a specific date, click on the data cell under the duration heading in the row corresponding to the date you wish to edit. The Duration window will then be visible and you can change the duration by selecting the appropriate item from the list. You can add a duration to the list or remove one by clicking the "Add" or "Remove" buttons. Once you have selected the appropriate duration, click OK and the information will appear in the Main Window data list.



SYMPTOMS

Click on the data field under the Symptom column in the row you wish to edit. The symptoms window is set up with 3 different information boxes. The uppermost box contains a list of general categories that symptoms can be placed into. If you click on a category, the associated symptoms will appear in the box below it. You can then select the symptoms the patient endorses by double-clicking them, or selecting them and clicking the arrow-button (">>>") to send the symptom the box in the lower right corner.

You can add or remove a symptom category by clicking the "Add" or "Remove" buttons next to the category box. You can also add or remove symptoms from a symptom category by clicking the "Add" or "Remove" buttons next to the symptom list box.



To remove a symptom from the list of selected endorsed symptoms, select the symptom in the box in the lower right corner and press the reverse arrow-button ("<<<")

DIAGNOSES

Click on the data field under the Diagnoses column in the row you wish to edit. The Diagnoses window is set up with several different information boxes. The uppermost box contains a list of general categories that Diagnoses can be placed into. If you click on a category, the associated diagnoses will appear in the box below it. You can then select the diagnosis you wish to use by clicking on it and clicking the arrow-button (">") next to the Axis you wish to assign the Dx to.

You can add or remove a Diagnostic category by clicking the "Add" or "Remove" buttons next to the category box. You can also add or remove Diagnoses from a Diagnostic category by clicking the "Add" or "Remove" buttons next to the diagnoses list box.

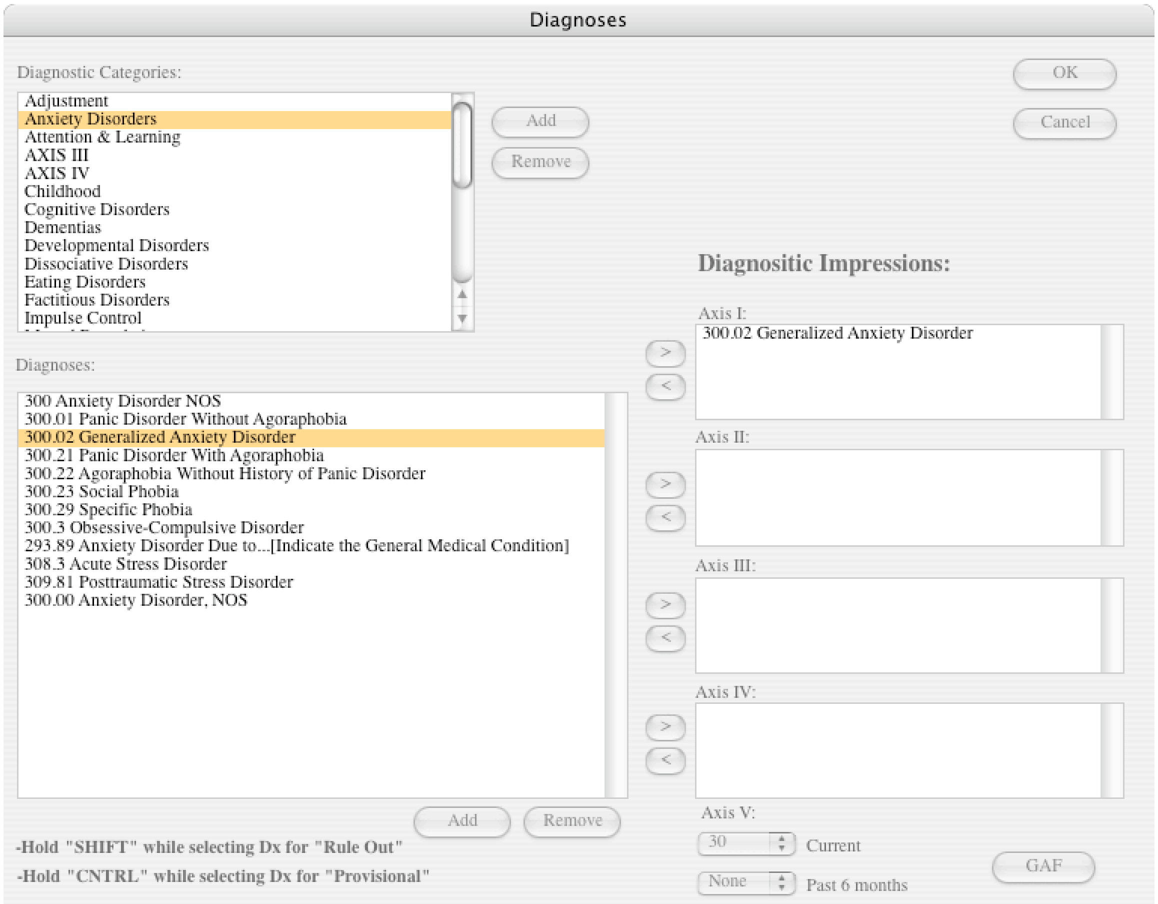
To remove a diagnosis from an Axis, select the Dx in the Axis box in the lower right corner and press the reverse arrow-button ("<")

RULE-OUT and PROVISIONALS

To "Rule Out" a Diagnosis, hold down the "Shift" key when you click on the arrow button next to the Axis you wish to add the diagnosis to. To indicate that a diagnosis is "Provisional", hold down the "Cntrl" key when you click on the arrow button next to the Axis you wish to add the diagnosis to.

GAF (Global Assessment of Functioning; Axis V):

Select the patient's current GAF and/or Past 6 month GAF using the pop-up menus under the Axis V label. Clicking on the GAF button displays a copy of the GAF scale from DSM-IV

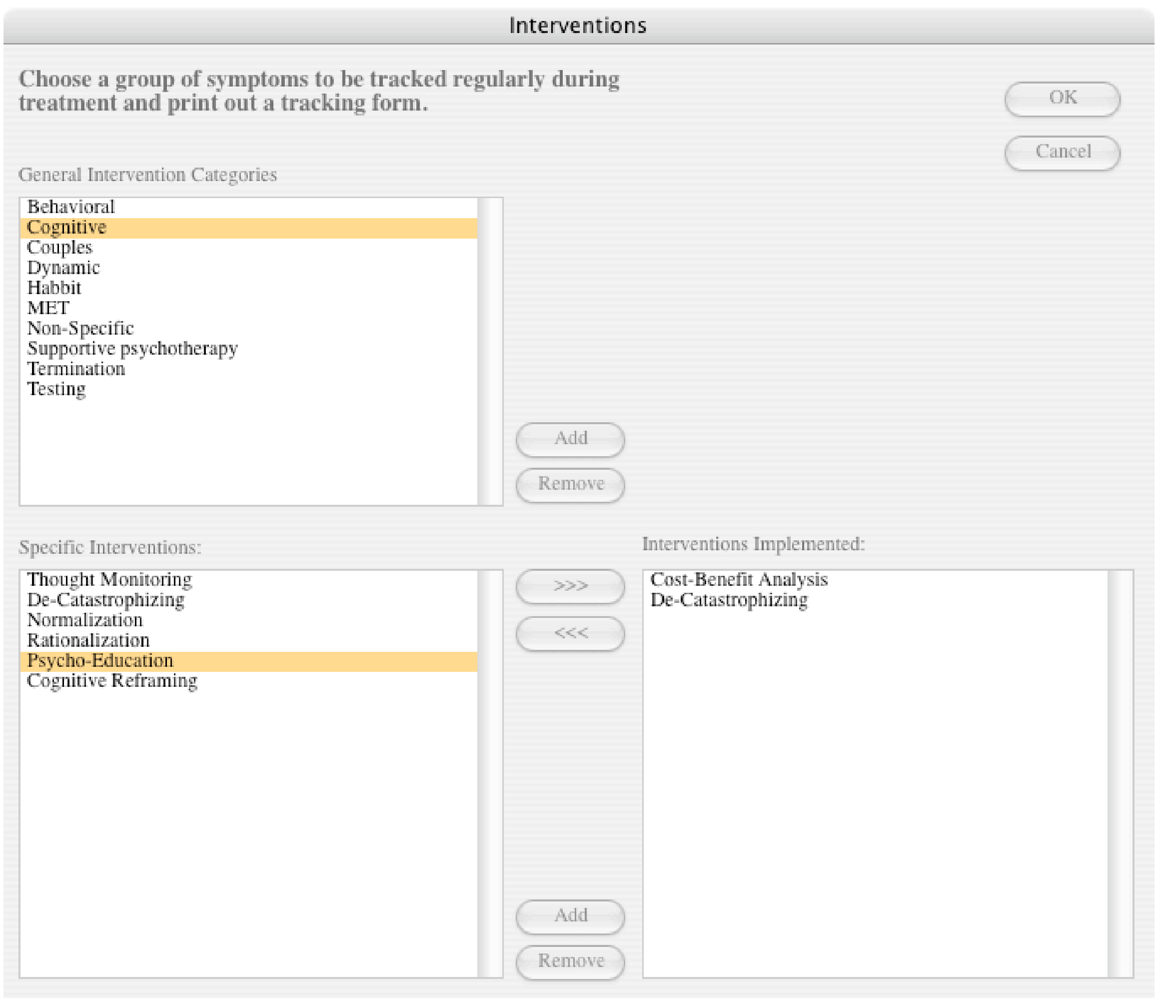

Diagnoses
Diagnostic Categories:
Adjustment
Anxiety Disorders
Attention & Learning
AXIS III
AXIS IV
Childhood
Cognitive Disorders
Dementias
Developmental Disorders
Dissociative Disorders
Eating Disorders
Factitious Disorders
Impulse Control
Add
Remove
OK
Cancel
Diagnositic Impressions:
Axis I:
300.02 Generalized Anxiety Disorder
Diagnoses:
300 Anxiety Disorder NOS
300.01 Panic Disorder Without Agoraphobia
300.02 Generalized Anxiety Disorder
300.21 Panic Disorder With Agoraphobia
300.22 Agoraphobia Without History of Panic Disorder
300.23 Social Phobia
300.29 Specific Phobia
300.3 Obsessive-Compulsive Disorder
293.89 Anxiety Disorder Due to...[Indicate the General Medical Condition]
308.3 Acute Stress Disorder
309.81 Posttraumatic Stress Disorder
300.00 Anxiety Disorder, NOS
Axis II:
Axis III:
Axis IV:
Add
Remove
Axis V:
-Hold "SHIFT" while selecting Dx for "Rule Out"
-Hold "CNTRL" while selecting Dx for "Provisional"
30
Current
None
Past 6 months
GAF

INTERVENTIONS

Click on the data field under the Intervention column in the row you wish to edit. The intervention window is set up with 3 different information boxes. The uppermost box contains a list of general categories that intervention can be placed into. If you click on a category, the associated interventions will appear in the box below it. You can then select the interventions you wish to track by double-clicking them, or selecting them and clicking the arrow-button (">>>") to send the intervention to the box in the lower right corner.

You can add or remove a intervention category by clicking the "Add" or "Remove" buttons next to the category box. You can also add or remove interventions from a intervention category by clicking the "Add" or "Remove" buttons next to the intervention list box.

To remove a intervention from the list of selected interventions for the patient to track, select the intervention in the box in the lower right corner and press the reverse arrow-button ("<<<")

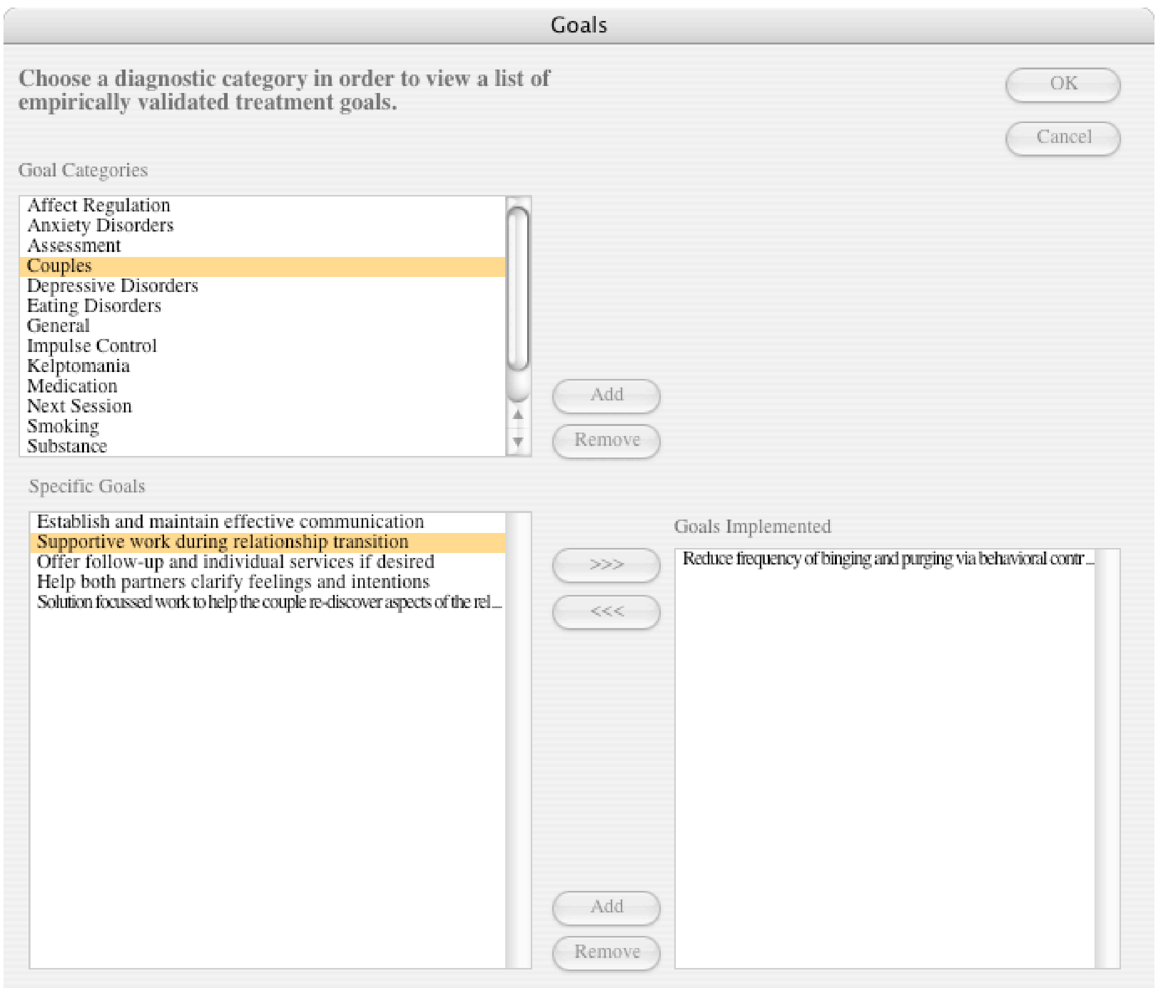


GOALS

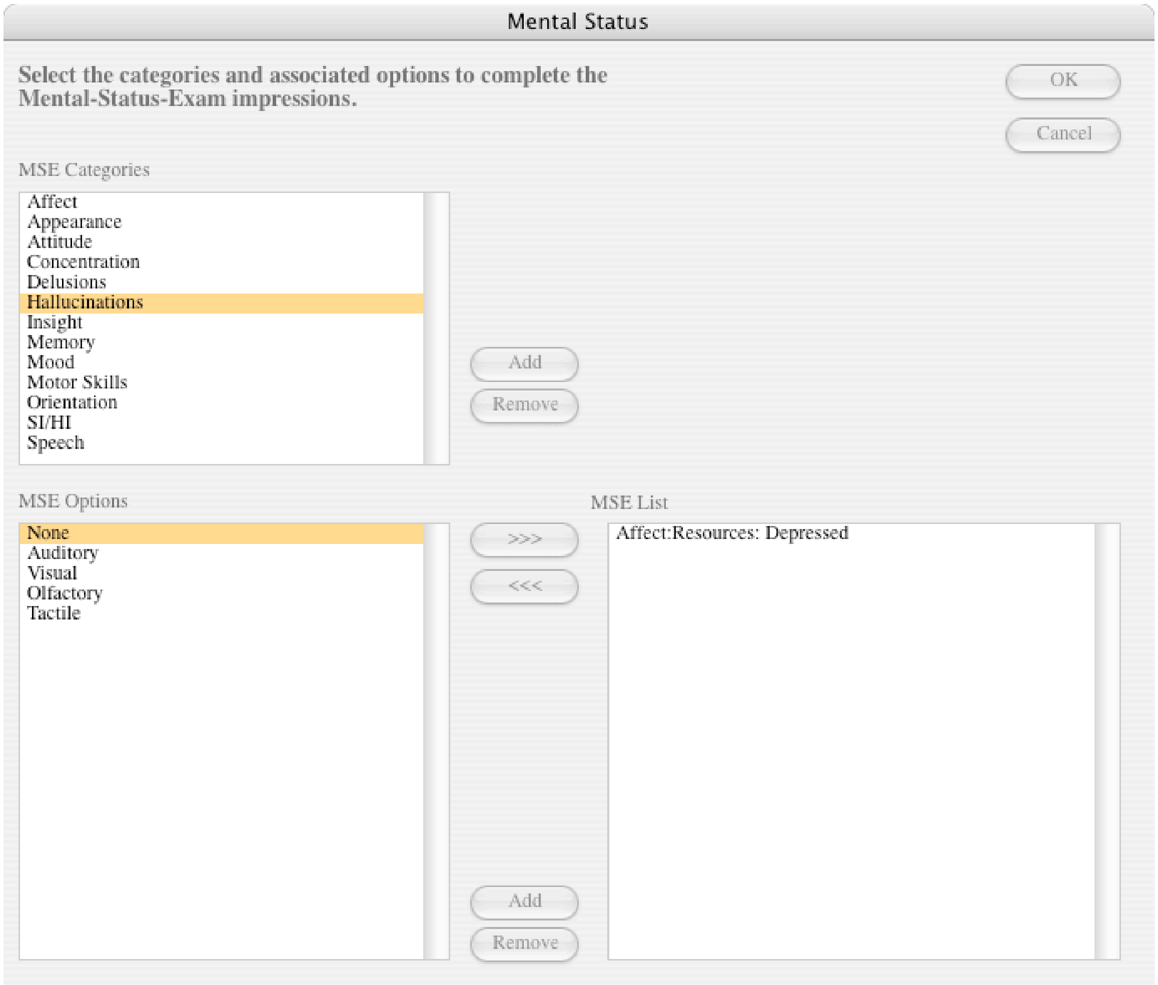
Click on the data field under the Goal column in the row you wish to edit. The goal window is set up with 3 different information boxes. The uppermost box contains a list of general categories that a goal can be placed into. If you click on a category, the associated goals will appear in the box below it. You can then select the goals you wish to implement by double-clicking them, or selecting them and clicking the arrow-button (">>>") to send the goal to the box in the lower right corner.

You can add or remove a goal category by clicking the "Add" or "Remove" buttons next to the category box. You can also add or remove goals from a goal category by clicking the "Add" or "Remove" buttons next to the goal list box.

To remove a goal from the list of selected goals for the patient to track, select the goal in the box in the lower right corner and press the reverse arrow-button ("<<<")

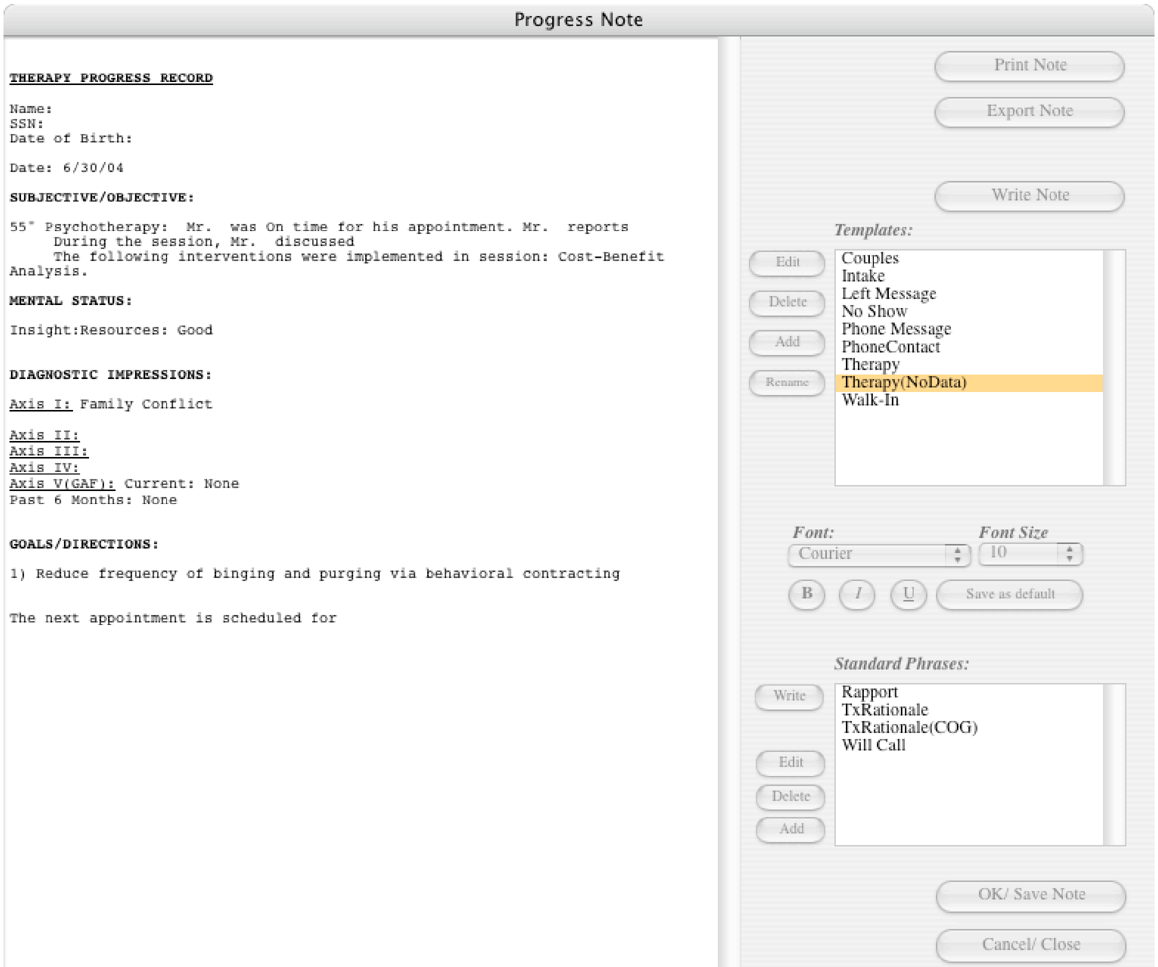


MENTAL STATUS



The Mental Status window works just like the Symptom, Diagnosis, Goals and Intervention windows. However, when you select two or more modifiers from the same Mental Status Category, they are added to the Mental Status report separated by commas instead of on separate lines.

NOTE WRITING



Standard Phrases

You can create several standard phrases that you may use with regularity in your progress notes. Click ADD next to the "Standard Phrases" box and name your Standard Phrase. Then select the phrase by clicking on it once and click EDIT. You can now type the standard phrase in the new window that appears and click SAVE when you are done. You can add the phrase directly to the note in the Progress Note window by clicking WRITE. This places the standard phrase wherever the cursor is in the text. OR you can incorporate standard phrases into your progress note templates…see TAGS below.

Templates

Templates are text files that contain both text and TAGS (discussed below) that you can use to generate progress notes that combine pre-set narrative combined with patient information. You can create Templates for a variety of note-writing situations. To create a new template click ADD next to the template box. Type the name of the template and click OK. Select the template by clicking on it once and then click EDIT. You can then type the template text into the window that appears. Click SAVE when you are done. To use the template, either double-click on the template name or select the template and click WRITE NOTE at the top of the screen. To rename a template, click once on the template name to select it and then click RENAME. Type in the new name for the template and click OK.

Tags

Tags are pre-set phrases in ClinTrak III that allow the user to specify certain types of information the program will fill-in within the clinical note templates. The user can create several different types of note templates for different note-writing situations and he/she can use tags to have certain types of information automatically updated in the note document(s). Tags are always enclosed between these symbols: "< >". For example, the user can make use of the <lastname> tag by creating a note template containing the following sentence: "The client's last name is <lastname>." When this template is selected in the note-writing window, the program automatically replaces the <lastname> tag with the client's last name, and the sentence would read "The client's last name is Smith."

The following are valid tags in ClinTrak III:

<lastname> = Client's Last Name
<firstname> = Client's First Name
<ssn> = Client's Social Security Number
<idn> = Client's Clinic ID/Chart Number
<dob> = Client's Date of Birth
<age> = Client's Age
<sex> = Client Gender
<ethnicity> = Client's Ethnicity
<marital> = Client's Marital Status
<date> = Date of Entry
<header> = Pre-set Header For First Page of Note
<footer> = Pre-set Footer (e.g., Signature Lines)
<contacttype> = Type of Client Contact
<duration> = Duration of Client Contact
<status> = Status of Appointment (e.g., 5 minutes late)
<symptoms> = List of reported symptoms

<pro> = Pronoun (e.g., he, she)
<pospro> = Possessive Pronouns (e.g., his, her)
<indpro> = Indirect Pronoun (e.g., him, her)
<cpro> = Capitalized Pronoun
<cpospro> = Capitalized possessive pronoun
<cindpro> = Capitalized indirect pronoun
<prefix> = Title (e.g., Mr., Mrs., Ms.)
<axis1> = Diagnoses on Axis I
<axis2> = Diagnoses on Axis III
<axis3> = Diagnoses on Axis IIII

<axis4> = Diagnoses on Axis IV
<axis5> = Diagnoses on Axis V (GAF Ratings)
<goals> = List of Therapy Goals
<interventions> = List of Interventions Used During the Contact
<mse> = Mental Status of Client

PLUS you can use tags to represent any of your standard phrases. Just type the name of the standard phrase inside the tag markers "<" and ">". Example <MyStandardPhrase>.

A more comprehensive example of a sentence in a note template might be:

"<prefix> <lastname> is a <age>-year-old <marital> <ethnicity> <sex> who presented at the clinic on <date> for psychological services. <prefix> <lastname> was <status> for <pospro> appointment."

This would translate into:

"Mr. Smith is a 30-year-old married white male who presented at the clinic on 7/5/03 for psychological services. Mr. Smith was 5 minutes late for his appointment."

<u>Formatting Tags:</u>
Formatting tags are also available to add bold, underline and italic features. Text within a template that is to be bold, is simply placed between the bold tag and the end-bold-tag .

For example, the following sentence has bold and normal text in it: "This is just an example to show how the bold function works."

This sentence would look like:
"This is **just an example** to show how the bold function works."

The same logic is used for underline and italics:
"This is an <u>example</u> showing all three types of available <i>formatting.</i>"

This sentence would look like:
"This is an <u>example</u> showing **all three** types of available *formatting*."

OPENING FILES
To open a patient file, click the Open button at the top of the Main Window. Select the the ClinTrak file you wish to open and click OK or OPEN. You can also double-click on a Clintrak file or drag a Clintrak file onto the ClinTrak Icon to open the file.

SAVING FILES

To save a patient file, Click on the Save button at the top of the Main Window. Name the ClinTrak file (preferably with a .clt suffix) and click OK or SAVE. The program also saves backup files into a folder called BackUpFiles. Additionally, the program updates the backup files every 60 seconds automatically.

The saved files are in an Encrypted format only readable with ClinTrak3. Additionally, different sites using ClinTrak3 will have different encryption algorithms so files generated at one site (e.g., IOP) cannot be opened with the ClinTrak program installed at CAPS.