

# SuperDOC! User's Guide

Version 1.4

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## INTRODUCTION

Thank you for selecting SuperDOC! for your patient discharge documentation requirements. The purpose of SuperDOC! is to allow doctors to provide meaningful instructions and reiterate important facts that patients must keep in mind when they leave the hospital. Such capabilities include the ability to create prescriptions, provide doctor notes to outside organizations, or direct the patient to specific referral doctors.

This system has evolved from the early days of stand alone personal computers to the present day networked and internet-aware environment. Originally designed by an emergency room doctor, it has been installed in a large and growing number of hospitals. Hundreds of thousands of patients have benefited from its capabilities.

Indeed, after being hit by an automobile while riding my bike in a bike lane, I found myself in an emergency room. When I was discharged, I was provided instructions from a version of SuperDOC! licensed to a health care information software company that was included in their product. Because we did not support them directly, I did not even know that this local hospital was a user of SuperDOC!.

We believe this product to be the standard.

### ***Purpose of this document***

This document is meant to get you up and going, and provide the basics on how to customize the program to meet your requirements.

### ***Customer Support***

SuperDOC! is utilized in environments by individuals that cannot tolerate anything less than near 100% reliability. While we cannot guarantee on-site 24 hour support 7 days a week, we have attempted to come as close as possible within the economic constraints placed upon us by the amount that we can charge for SuperDOC!

The first line of customer support and sales information is:

AccuQual  
405 Via Del Norte Suite D  
La Jolla, California 92037  
1-800-541-5219

Casey Cole is responsible for writing and supporting this version of SuperDOC!. He provides a web site for SuperDOC! at:

[www.caseycole.com](http://www.caseycole.com)  
[ccole@caseycole.com](mailto:ccole@caseycole.com)

Customers that are current with the optional licensing fee and have installed a modem are supported through remote diagnostics.

### ***SuperDOC! Architecture and System Requirements***

Any new Windows computer you can buy will run SuperDOC!. At a minimum you should have Windows 95, 32mb of Ram memory, 100mb of disk space, and a modem. SuperDOC! will run on Windows NT 4.0, Windows 2000, and Windows 98. It will not run on DOS or Windows 3.1. No problems have been encountered on Novell.

*The remainder of this section is somewhat technical, so you may want to skip it unless you have some understanding of computer technology.*

SuperDOC! is designed to operate well in a local area network. The system programs and data files do not have to be located on the same computer. The same data can be accessed by several workstations at different physical sites at the same time.

To minimize the source of technical problems, SuperDOC! is developed with Microsoft software. There are two exceptions to this: 1) the use of a third-party vendor of “combo” list controls; 2) the fax server (if implemented). Version 1.4 has been developed utilizing MicroSoft’s Visual C++ 6.0.

It utilizes the current standard whenever possible to allow for integration with outside software. For instance “Rich Text Format” is used for the source instructions and documents, and the “Open Database Connectivity” (ODBC) standard for the database. It comes with a MicroSoft ACCESS database (if someone wants Oracle, we will provide that as well).

Integration with external hospital systems is available through direct access to the SuperDOC! database through ODBC. This means that any external system capable of using MicroSoft tools like Basic, C, Java or ACCESS can easily insert and retrieve information. Database specifications are provided.

The primary source of problems encountered in the real world are associated with printers. We strongly suggest the use of laser printers for patient discharge instructions. Most users currently utilize the laser printer for doctor notes and prescription forms as well, but many existing clients utilize a dot matrix for prescription forms. Because SuperDOC! uses the standard Windows printer interfaces, you can change between network printers, local printers, or fax machines at will. Any printer that will work with Windows should work with SuperDOC!

## ***Installation***

If you are running on Windows 98 or Windows 2000, simply inserting the CD into the drive should initiate the process.

If the SuperDOC! install program *doesn't automatically* start, from the Windows Desktop:

- click on **Start**
- click on **Run**
- type **D:setup** (if D: is the CD drive)
- click on **OK**

The installation programs will display a legal document indicating that the product is copyrighted, then ask for your name, and which directory to install to. It is suggested that you take the default (c:\Program Files\SuperDOC!) directory unless you have good reasons not to.

During installation, SuperDOC! will notify you that it wants to install **MicroSoft Data Access Components** and **Adobe's Acrobat Reader**. These products are necessary for SuperDOC! to communicate with the database and to print out this User's Guide. However if you already have them installed, you may not want to reinstall. Reinstallation should not cause a problem.

If you want to use automatic updating from the internet, you will need **MicroSoft's Internet Explorer 4** or above installed. It does not have to be your primary browser, it just needs to be there because this product is written with MicroSoft programming tools and they have put Visual C++ internet functions into that product.

After installation, to start SuperDOC!, from the Windows desktop:

- click on **Start**
- click on **Programs**
- click on **SuperDoc**

The first time you start SuperDOC! on a workstation, it will ask you to select the “site” and set the printers that are going to be used. Typically there will only be one *site* initially, but there can be many. Each *site* has their own customized user list and certain specific information for output documents like the site title.

## Installation Problems

The most common problems are associated with the printers - either because the wrong printer was selected during the printer setup or SuperDOC! was not restarted after the printers were set. To reset the printers, from the main SuperDOC! window, select the "Settings" menu option, select "... reset printers", select the printers for each of the documents, and then **restart SuperDOC!**

## Setting up a prescription dot matrix printer

There are a lot of printers out there, and none of the commonly available ones print small prescription forms well. We have a lot of experience in this area, so give us a call before you spend too much time trying to configure a printer for prescription forms.

While it is true that every SuperDOC! is customized prior to shipment, there will be more customization after installation. Most SuperDOC! customization will be covered in future topics, but if you are using a dot matrix printer and special sized forms, you need to set the prescription printer up as soon as possible.

Prescription printers need to be assigned appropriate page size information. This is done through the standard Windows printer driver setup. From the Windows desktop:

- click on **Start**
- click on **Settings**
- click on **Printers**
- click on the appropriate printer
- right-click and select **Properties**
- click on the **Paper tab**
- select **custom**
- input the page size (note that this is usually in hundredths - so 4 ½ inches is 450).

## GETTING STARTED

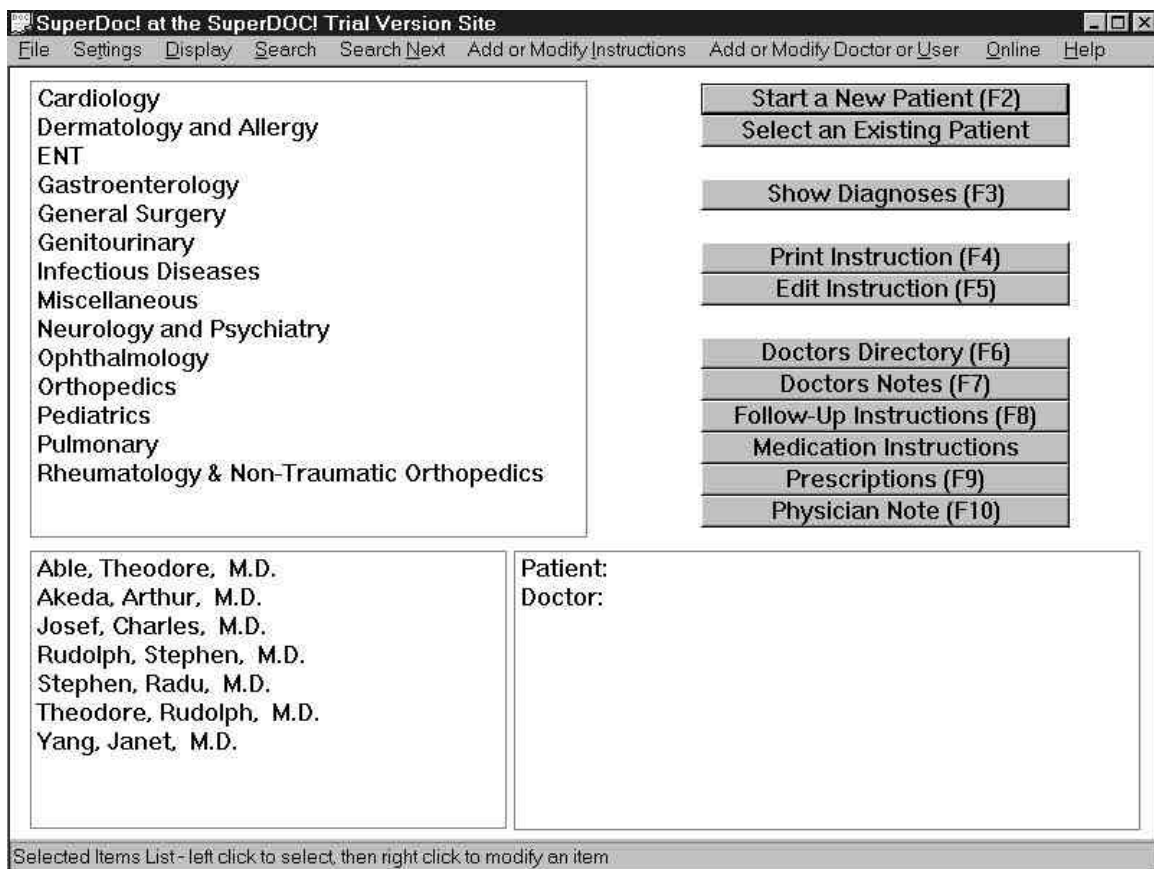
At this point SuperDOC! should be installed. You should be able to start the program from the desktop (the desktop is the Windows screen that appears right after logging in) by:

- clicking on **start**
- clicking on **programs**
- clicking on **SuperDOC** (sometimes people have difficulty finding it the first time).

Start the program if you have not already.

### *After You Start The Program ...*

The **main window** will be shown. It has buttons on the top right, a list of instruction categories on the top left, a list of doctors on the bottom left, and a list of the selected items (none so far) on the bottom right.



### Example: Create and Print A Simple Patient Instruction

At a minimum you need a patient name, doctor's name, and an instruction. The most simple discharge document would require the following steps:

- click on the **New Patient Button** and enter the requested information (note the patient name will be added to the lower right list box). The cursor will move to the list of doctors on the left.
- click on the appropriate **doctor name** in this bottom left box (note the doctor name will be added to the lower right list box). The cursor will move to the patient instruction category list).
- click on the appropriate **patient instruction category**. A list of patient instructions for this category will be displayed.

- click on the appropriate **patient instruction** ( note the patient instruction will be added to the lower right box.)
- click on the **Print Button**. If this is the first document printed after the program has started, it will ask for the printer. Thereafter it will default to the chosen printer.

## ***The Initial (Main) SuperDOC! Menu***

Okay, so we can produce a simple instruction. What is the rest of this stuff on the main menu? Although this initial menu is pretty self-explanatory, here is an overview:

### Menu Bar

On the top is the typical Windows Menu Bar with **File**, **Settings**, **Display** and **Help** options.

File : To open or save a particular patient's data for later retrieval.

Settings : To change information in the database or templates, reset the workstation site or printers, or override default settings.

Display : To change how diagnosis and patient instruction information is displayed and collected.

Search: Will search for the first diagnoses or instructions containing specific text in their titles

Search Next: Will search for the next diagnoses or instructions containing specific text in their titles

Add or Modify Instructions: This will take you to a dialog to change or add follow-up notes, doctor notes, patient and medicine instructions, and such things as the prescription form and header and trailer.

Add or Modify Doctor or User: Allows you to add referral doctors to the doctors directory or to create new users.

Online: Allows you to go to our website to check the Customer Support page or to check for and automatically update your SuperDOC! program. You need to be connected to your Internet Service Provider (ISP) to access this function.

Help: To invoke the help system you are currently using.

You can invoke these functions without the use of the mouse by using the ALT key simultaneously with the character that is underlined (e.g. the File function would be ALT+F).

### Buttons

In the upper right are a number of buttons: **Start a new Patient Button** clears all existing client information entered and requests a patient name (and other information if required). The **Select An Existing Patient Button** brings in all the information generated during a prior session for a particular patient on a specific day. **Show PI Instructions Category/Show Diagnosis Button** changes whether the **Patient Instruction Category List** or the **Diagnosis Tree List** is shown as mentioned in the next paragraph. The **Print Button** prints the Patient Discharge Document that includes patient instructions associated with diagnoses, doctors notes, prescriptions or follow-up notes. **Edit Button** customizes a Patient Discharge Document prior to being printed. The **Doctors Note Button** creates doctor notes. **Prescription Button** creates prescriptions. **Doctors Directory Button** displays information on doctors. **Follow-Up Button** creates a note requesting the patient to follow-up with outside treatment. The **Physician Note Button** is a short cut to the follow-up note allowing the physician to enter text into the discharge document.

### Patient Instruction Categories or Diagnoses

In the upper left is a box that alternates between showing the **Patient Instruction Category List** and the **Diagnosis Tree List** (a "tree" list displays information graphically). The **Show PI Instructions Category/Show Diagnosis Button** switches the display between the **Patient Instruction List** and the **Diagnosis Tree List**.

One note here: the user can set the "display options" to indicate that information is to be displayed in a "list" instead of a "tree diagram" for diagnoses and a single "list" of patient instructions instead of one divided first into categories. Let's stick with the basics and put this off until later ...

If the **Patient Instruction Categories** are shown and the user double-clicks on one of the **Patient Instruction Categories**, a **Patient Instruction List** for that category will be displayed. Once a patient instruction has been selected from this list, the appropriate instruction is added to the list of instructions and notes to be printed on the Patient Discharge Document.

Not surprisingly, if the **Diagnosis Tree List** is shown, the user also selects a diagnosis by double clicking on it. A “+” plus to the right of an item indicates that the item is a diagnosis category and a single mouse click will expand the category to allow for the selection of individual items.

## Doctor List and Add Doctor Name

In the lower left is a **Current Doctor List**. Individuals can be selected and identified as the “doctor” on the instructions.

Immediately after entering a patient name, the program will place the user in the **Current Doctor List**. The name of the doctor selected for the prior patient instruction is selected by default. A simple ENTER key stroke will select that doctor.

Alternatively, a doctor can be selected by double-clicking on an individual entry with the mouse or by using the down arrow key to highlight the desired name, followed by an ENTER key. You can also type in the first character of the name to scroll as well.

If an organization utilizes physician assistants or would like to add individuals other than the physician, the user can set the system to ask for this individual after the physician is selected. The **Physician Assistant/Doctor List Button** will be displayed if this option is chosen. To change this option:

- ☛ Click on **Settings** in the Menu Bar at the top of the menu, then selecting **SuperDOC! System Data Table Settings**, then **Configuration Table**, then **Options Tab**. Check the “Enable Assistants List” box.

## List of Selected Items

In the lower right is a **List of Selected Items**. As the user clicks on the various lists and buttons described above, a list of the selections are displayed. The user can delete a note or instruction by clicking on it (and thereby selecting it) and then pressing the delete key.

There is a lot more that can be done to modify the information listed in this box through the use of the right-click mouse button, but more about that later.

## Status Bar

At the very bottom is the **status line**. It displays the name of whatever the mouse cursor is pointing at. If the F1 function key is hit, the online help will display the appropriate help information.

## *Customizing the Initial (Main) Menu*

SuperDOC! is designed to encourage changing the initial menu to match your preferences and business requirements. For instance, by default the patient instructions were selected first by selecting the patient instruction category, and then selecting from a list of patient instructions. You could set the program to display the list of diagnoses first.

There are two places where customization settings for this menu are set:

- ☛ Temporarily through clicking on **Display** in the Menu Bar at the top of the menu
- ☛ Permanently through clicking on **Settings** in the Menu Bar at the top of the menu, then selecting **SuperDOC! System Data Table Settings**, then **Configuration Table**, then **Display Tab**. Check the appropriate box.

The following sections discuss some of the display options.

## Display Diagnoses initially instead of the Patient Instructions

The configuration of the menu basically assumes that an emergency room physician does not wish to specify a diagnosis. If that is incorrect, it is reasonable to assume that they wish to select the diagnosis prior to patient instructions. To change:

- Temporarily through clicking on **Display** in the Menu Bar at the top of the menu, then **Show Diagnoses Initially**
- or Permanently through clicking on **Settings** in the Menu Bar at the top of the menu, then selecting **SuperDOC! System Data Table Settings**, then **Configuration Table**, then **Display Tab**. Check the appropriate box.

## Display Patient Instructions automatically after a Diagnosis is selected

Instead of clicking on the third button, **Show PI Instructions Category/Show Diagnosis Button**, the user can set the list to appear right after the diagnosis selection. To change:

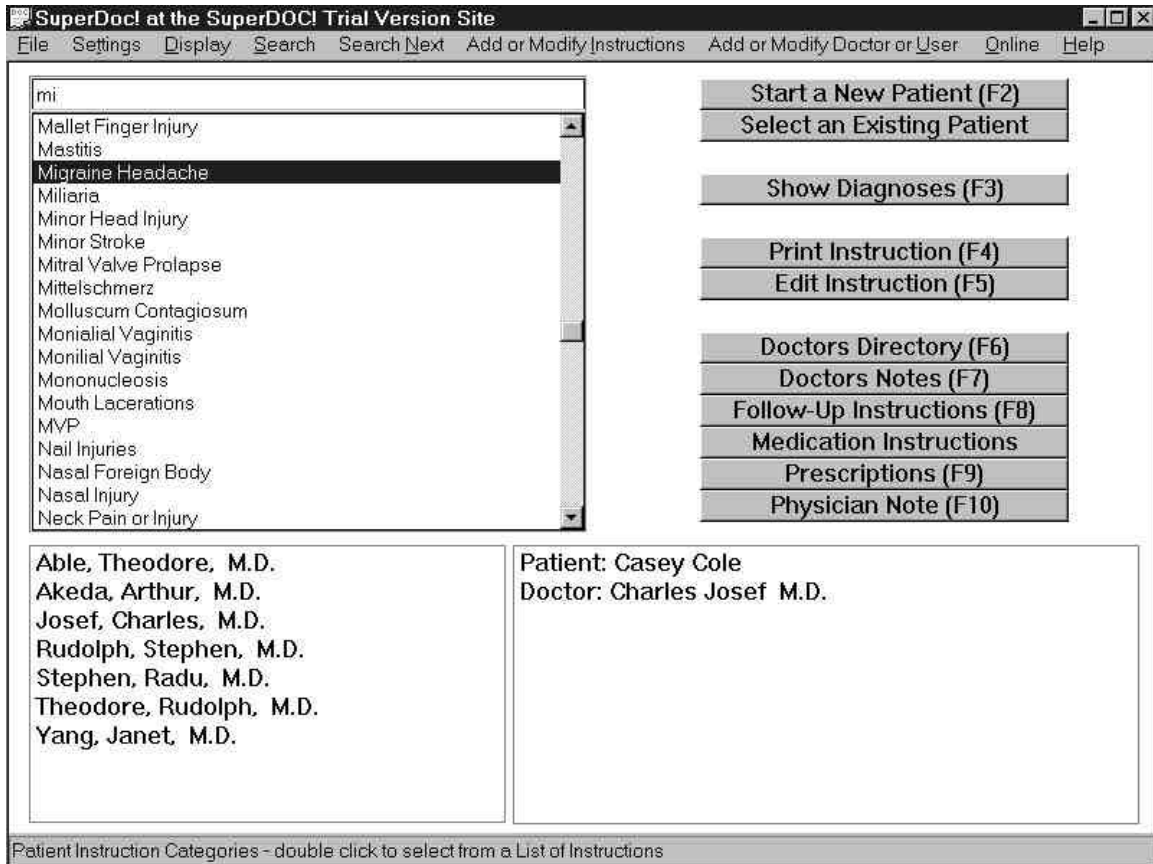
- Temporarily through **Display** in the Menu Bar at the top of the menu, then **Show PI List After ...**
- or Permanently through **Settings** in the Menu Bar at the top of the menu, then selecting **SuperDOC! System Data Table Settings**, then **Configuration Table**, then **Display Tab**. Check the appropriate box.

## Select a Patient Instruction or Diagnosis by typing in the first characters of the name

Don't like to use the mouse? This will present what MicroSoft refers to as "combination edit and list boxes" instead of just "list boxes". The idea is, instead of scrolling to the desired item, the user can type in the first few characters, and the list will automatically scroll to the desired place (it should be noted that even in a list box, entering the *first* character will cause the list to scroll to that part of the list).

- Temporarily through clicking on **Display** in the Menu Bar at the top of the menu, then **Show (PI or Diagnosis) as Combo List ...**
- or Permanently through clicking on **Settings** in the Menu Bar at the top of the menu, then selecting **SuperDOC! System Data Table Settings**, then **Configuration Table**, then **Display Tab**, and click on the appropriate box.

An example of the display using a patient instruction combo list box:



## Select physician assistants to be included on printed documents

The printed discharge document typically provides the name of the physician. The physician assistant can also be listed. If they are listed, a list of physician assistants will be presented immediately after the physician has been selected. To set this option:

- click on **Settings** in the Menu Bar at the top of the menu, then select **SuperDOC! System Data Table Settings**, then **Configuration Table**, then **Options**, then **Enable Assistant List**

It will be necessary to have specified physician assistants in the Doctors Directory Table as well as modify the Patient Instruction Header Template.

## Automatically select a particular Patient Instruction for each diagnosis

It is possible to associate particular patient instructions with particular diagnoses. The initial association can be set by:

- clicking on **Settings** in the Menu Bar at the top of the menu, then selecting **SuperDOC! System Data Table Settings**, then **Diagnosis Table**, then **Existing** or **New**, then **Default Patient Instruction**

Alternatively SuperDOC! can be set to “remember” and use the last patient instruction selected for any diagnosis by:

- clicking on **Settings** in the Menu Bar at the top of the menu, then selecting **SuperDOC! System Data Table Settings**, then **Configuration Table**, then **Options**, then **Enable Diagnosis/PI Link**

## Deleting and editing selected instructions

As the user selects instructions to add to the patient’s discharge document, they are listed in the box in lower right corner of the main window - the **Selected Items List**.

The user can edit, display properties, delete, or print items within this list if they click the **right** mouse button while an item is highlighted. This will cause the **Selected Items Utility Menu** to be displayed.

The user will be presented with the option to **edit, print, show the properties for,** or **delete the item.**

The user can edit a selected item directly by **double-clicking** on it.

There is a subtle difference between the editing done here and that done through the **Edit Button** on the initial main menu: changes made to patient instructions here are not lost if new items (and therefore a new output document) are selected. The changes are maintained until a new patient is processed.

## Changing the selected doctor or patient name

The selected doctors name can be changed by simply clicking on a new doctor name in the Doctors List to the left of the Selected Items List.

The patient name can be modified by **double-clicking** on the patient's name in the Selected Items List.

## ***Modifying a prior Patient Discharge Instruction***

The user can retrieve the information used to create a discharge document by clicking on the **Select an Existing Patient Button.**

When first invoked, this presents a list of patients processed through SuperDOC! for the current day.

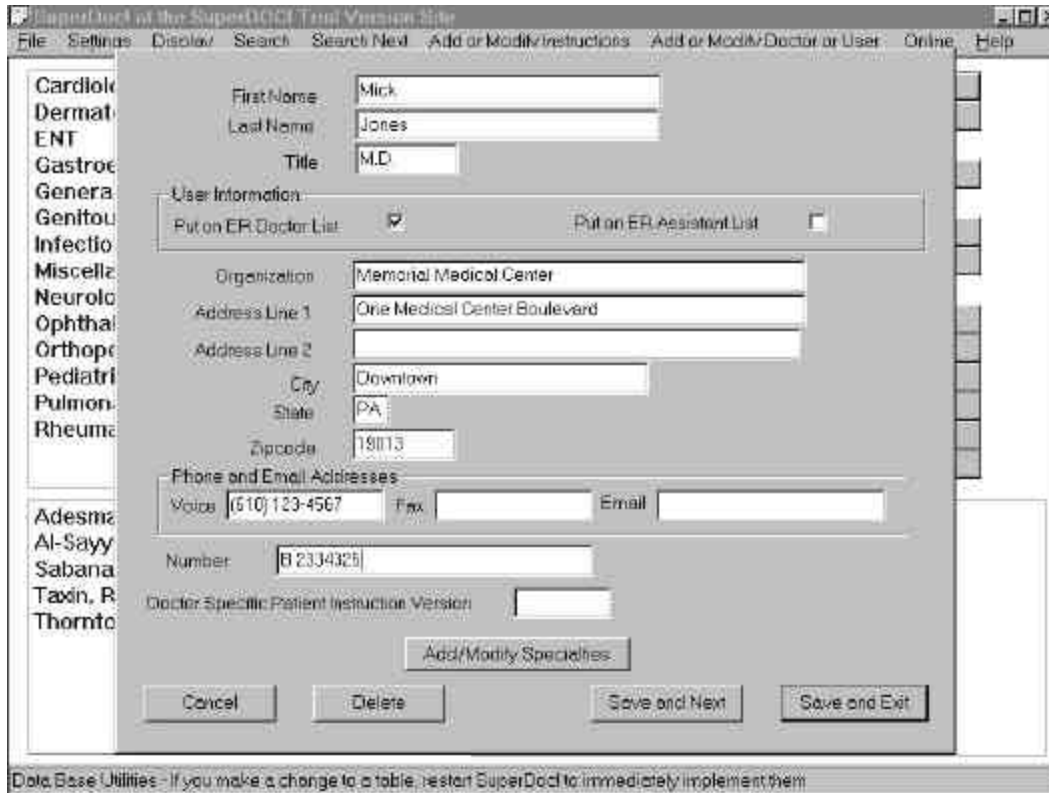
The user is able to select patients from prior days or a particular account number, or to sort by date or account number, by changing the settings in the "Sort", "Date", or "Account Number" groups. If the "Account Number" is changed, the "Reselect" button must be pressed (for "sort" or "date" this is done automatically).

## ***Adding a user name to the initial main menu***

There are two ways to add a doctor not on the **Current Doctor List.**

- **For the remainder of the SuperDOC! session:** if the doctor's name appears in the Doctors Directory, the user can click on the **Doctors Directory Button**, and then double-click on the desired name. The name will be added to the end of the **Current Doctor List** for the remainder of the SuperDOC! session.
- **Permanently:**
  1. click on **Add or Modify Doctors or Users** on the Menu Bar at the top of the menu
  2. select **Existing** or **New**
  3. check the **Put on User List** check box.

Here is an example of what should be displayed for a user:



### ***Adding a Referral doctor***

1. click on **Add or Modify Doctors or Users** on the Menu Bar at the top of the menu
2. select **Existing** or **New**
3. select **New**
4. enter the appropriate data.

### ***Printing a work slip or note***

To print a note on behalf of a patient for an outside organization, click on the **Doctors Note Button** in the initial main menu, select the desired note and enter the return date or other text (if required).

You can print the note from this dialog. The note is printed separately from the discharge document. Because it can be printed on a special printer using special forms, SuperDOC! will request you enter which printer the first time a note is printed each SuperDOC! session.

You can also print the work slip from the main initial menu by clicking on the note in the **Selected Items List**. Right click the mouse and then select Print.

### ***Printing a referral or follow-up note***

To insert text into the discharge document indicating the need for further medical attention, click on the **Follow Up Note Button** in the initial main menu, select the desired entry, and select the referral doctor and required date.

This note is included in the discharge document.

### ***Inserting a physicians note into the discharge document***

Listed among the standard follow-up notes is the Physician Note. When selected, this note will cause the program to display a text editor. The user then inputs any specific text they want to include. While it is true

that the user can also edit the instructions through the Edit Button, those edits are *not* saved in the patient's data file. Text within a physician's note is saved with the patient's data. This is the preferred way to add substantial free form text.

### ***Faxing a copy of the discharge document to a referral doctor***

A copy of the discharge document containing the referral follow-up text can be sent to the referral doctor a number of ways:

- **One time basis:** click on **File** in the Menu Bar at the top of the menu, then select **Fax Current Discharge Document**. SuperDOC! will request the fax printer to use the first time each session. You will need to enter the fax number.
- **Automatically:** *Note: this facility is available, but has not been implemented in the field yet. If you are interested, please contact us. Assuming that we have installed the fax server, the following instructions are correct:* The fax number for the doctor must exist in the Doctors Directory and the Autofax capability must be enabled. If it is not enabled, click on **Settings** in the main Menu Bar, then **SuperDoc System Data Table Settings**, then **Configuration Table**, then **Auto Fax**, then enable both **Autofax** and **Referral Auto Fax**.

### ***Printing a prescription***

To print a prescription form for a pharmacy, click on the **Prescriptions Button** on the initial main menu.

The resulting dialog is utilized to produce prescription notes (forms) and optionally, medical instructions. For those who do not want to use the mouse, the "focus" of the dialog box will be in the "edit" part of a "combo box" where you can enter the name of a medicine. As you enter the characters of a name of a medicine, the list will scroll to the medicine beginning with the entered characters. **When you have the desired medicine highlighted, hit the enter key.** The medicine will be selected and you will be moved to the next list - available prescriptions and their disp and sig directions.

The user can select from this list either through the mouse or by using the up and down arrow keys. When the user selects a specific entry in any of the displayed prescription related lists, it will be inserted into the text field above the list. What is shown in this text field is what is printed. The user can over-ride the default and enter a unique value into the text fields directly.

In the event that a prescription or medicine does not exist, it can be added through the **Create a New Rx** and **Add a New Med** buttons. To add a new prescription, the medicine must be highlighted in the medicine list prior to pushing this button.

An optional doctor's note will be displayed when a medicine is selected that has a doctor's note associated with it. This note is used to display information for the doctor's information only, and will not be printed on the form.

Prescriptions can require the user to input specific prescription information - for instance a specific quantity. Such information is denoted by two or more underlines ("\_\_\_"). These lines should be replaced with values. SuperDOC! will not allow the user to exit the dialog successfully unless such fields are filled with information.

You can print the prescription from this dialog. The form is printed separately from the discharge document. Because it can be printed on a special printer using special forms, SuperDOC! will request you enter which printer the first time a note is printed each SuperDOC! session.

You can also print the prescription from the main initial menu by clicking on the note in the Selected Items List. Right click the mouse, and then select Print.

### ***Including medicine instructions***

If there is an instruction for a medicine, the system will print it in the discharge document. This can be turned off by removing the check from the Issue Prescription check box.

Alternatively, medicine instructions can be printed without a prescription form being generated through the **Medicine Instruction Button** on the initial main menu. *In the future, this button may be deleted from the initial menu (if you disagree, please email me).*

### **Changing the text of the prescription form**

On a one time basis, you could edit the prescription form by double clicking on the prescription listed in the **Selected Items List** in the lower right corner of the initial main menu.

To change the text of the prescription form permanently: from the initial main menu click on **Add or Modify Instructions** in the Menu Bar at the top of the menu, select **Prescription Form ...**, accept the default language by clicking Next, click on Prescription Form Templates and press Next and then Finish.

The standard MicroSoft word processor WORDPAD will be invoked with the prescription form. Basically you edit the form like a word processing document. See the chapter on Templates for more information. Listed below are the buttons and lists accessed when the indicated function key is pressed:

### **Using the keyboard to move about lists and the main menu**

The Windows environment places emphasis on the use of the mouse. However a number of individuals find the mouse to be awkward. We have attempted to minimize the awkwardness by incorporating alternative methods of moving about a window.

#### **The Enter Key**

Every button, dialog and list has a default value. Hitting enter will automatically select the default value. For lists, the default value is highlighted, for buttons the default value will have a rectangle of dots (hard to explain, but it is obvious when you see it). For instance when SuperDOC! first starts, hitting **Enter** bypasses the Tutorial (if the button is displayed), a second **Enter** invokes the **New Patient Button**. After the first name is entered, an **Enter** key will move to the last name, and after that an **Enter** will move to the **Doctor List**, and so on.

#### **The Tab Key**

The tab key will generally move you to the next button or list.

#### **The Up and Down Arrow Keys**

These keys can be used both to navigate about the main menu and about the list and combo list boxes. Using the arrow keys will move the "focus" (be highlighted) either up or down. Hitting the Down arrow key in a combo list box will cause the first element to gain focus, thereby allowing use of the Page Up and Page Down keys

#### **The Page Up and Page Down Key**

These keys will cause lists and combo lists to rapidly scroll up and down. The lists must have "focus" (be highlighted)

#### **Functions Key**

The function keys at the top of the keyboard will immediately invoke movement to specific buttons and lists. The mapping of the keys to the buttons or lists is:

F1	HELP
F2	START A NEW PATIENT BUTTON
F3	SHOW DIAGNOSES/PATIENT INSTRUCTIONS BUTTON
F4	PRINT INSTRUCTION BUTTON
F5	EDIT INSTRUCTION BUTTON
F6	DOCTORS DIRECTORY BUTTON

F7 DOCTORS NOTES BUTTON  
F8 FOLLOW-UP NOTES BUTTON  
F9 PRESCRIPTIONS BUTTON  
F10 PHYSICIAN NOTE BUTTON  
F11 DOCTORS LIST  
F12 PATIENT INSTRUCTION/DIAGNOSIS LIST

The functions keys are mapped in a clockwise direction beginning with the upper right corner button.

## CREATING AND EDITING SuperDOC! SOURCE DOCUMENTS

SuperDOC! is fundamentally a cross between a word processor and a database application. It takes information stored on “boiler plate” documents and merges it with stored information and information entered during the SuperDOC! session.

It is similar to a “mail merge” process where information is merged into source documents to produce form letters we all know and love. What information is to be merged into a document is indicated through the use of a *token* that is placed in a word processing *template* that is merged with SuperDOC! information to create the printed *documents*.

### ***Templates: The source documents for instructions and notes***

SuperDOC! uses word processing “boiler plate” data that is stored in what MicroSoft calls Rich Text Format. This format can be read by all word processors for Windows. When the source files are edited, the word processor that SuperDOC! uses defaults to the MicroSoft WORDPAD. In general what is printed looks exactly like what you see in the word processor.

Creating and editing SuperDOC! source documents consists of using the word processor to enter text and indicating the information to be inserted by placing tokens representing the desired information into the text.

### ***Tokens: Inserting patient and doctor information***

A token is a symbol within a word processing template that informs SuperDOC! to replace it with patient specific information. Tokens are available for almost any piece of information available on patients and doctors. When you select an instruction or note, SuperDOC! will search for tokens in the templates (word processing documents) associated with those instructions and notes. SuperDOC! then replaces the tokens with the actual information and adds the resulting “merged” information to the discharge document being created.

A token begins with a “less than” character (<), followed by a token identifier, and ending with a “greater than” character (>).

A special token will result in the user being prompted to enter information. Its symbol is “<<>>”. Anything between << and >> will be used to form the prompt text. For instance, the token

<<Please enter the number of stitches>>

will result in the Question Dialog displaying this text above a data entry box. The results of whatever the user enters replaces the token.

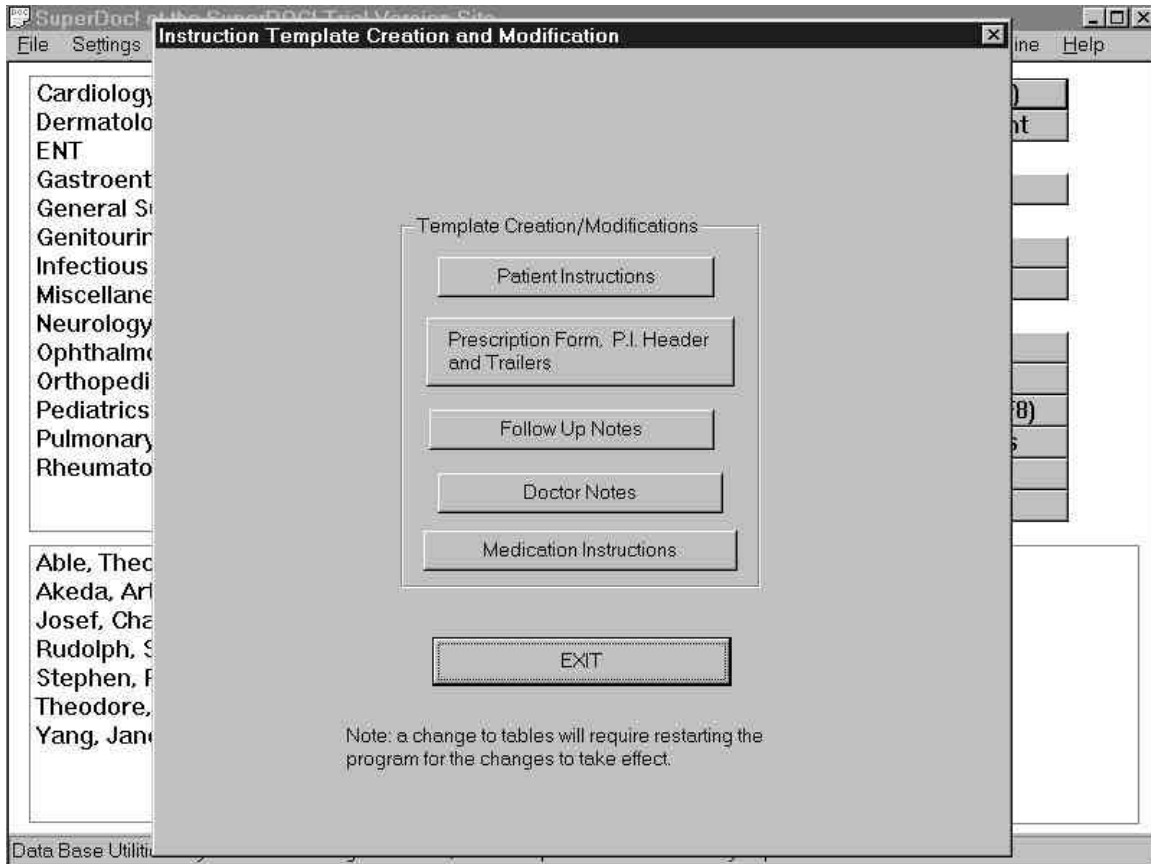
If a fixed length is absolutely required, the fixed length is inserted after the “less than” (<) character and before the token name (i.e. “< 20 Patient\_Name >” will result in a fixed length of 20 for the patient’s name).

For a list of the available tokens:

- see the Appendix
- invoke the on-line help from SuperDOC! by pressing F1 or Help in the main menu bar. Look for Templates in the index section and then display the information for Template Tokens.

### ***Selecting the instructions and forms (templates) to be created or edited***

To modify a template, it is necessary to indicate the desired template by Clicking on **Add or Modify Instructions**. This will result in this dialog being displayed:



## Patient Instruction template creation and modification

Click on **Patient Instructions** in the above dialog. If you are creating a new patient instruction then :

- accept the suggested file name by clicking on NEXT
- input the title you wish to display for the instruction in the patient instruction list. Click on NEXT.
- click on the category the instruction is to be listed under. Click on NEXT.
- accept the default language by clicking NEXT.
- click FINISH.

To format the instruction, it is suggested that you use 10pt font, leave a single blank line at the top, follow that with a 12pt title in bold, skip a line and enter the text. Do not leave an extra line at the bottom.

Modification of an existing document is basically the same except you use an existing template and don't have to specify the filename, title, or category.

## Modify header or trailer template used in the discharge document

Click on the **Prescription Form, PI Header, Trailer** button in the above dialog:

- accept the default language by clicking NEXT.
- click either Header or Trailer template.
- Click NEXT
- Click FINISH.

Usually tokens are used extensively in the header to indicate such things as date and patient name. Most of the tokens that you would use are used in the default header and trailer.

## Modify prescription form template

Click on **Add or Modify Instructions**.

Click on the **Prescription Form, PI Header, Trailer** button.

- accept the default language by clicking NEXT.
- click on the prescription form entry right below the Header or Trailer template entries.
- Click NEXT
- Click FINISH.
- Insert your text into the word processor.
- When you are done, click **File** in the menu bar,
- Click **Save**
- Click **Exit**.

This template can be modified through use of different size fonts and tokens to meet all known requirements. The forms can be made to be compatible with preprinted continuous forms. Since dot matrix printers often times are limited in their ability to reflect “true type”, some trial and error is common.

## Modify or Create Follow-Up Note templates

Click on **Add or Modify Instructions**.

Click on the **Follow-Up Notes** button.

Select new or existing.

If you are creating a new note:

- accept the suggested file name.
- input the title you wish to display for the instruction in the patient instruction list.
- click on any of the tokens you will want the user prompted for. Click on NEXT.
- click on the category the instruction is to be listed under. Click on NEXT.
- accept the default language by clicking NEXT.
- click FINISH.

To format the instruction, it is suggested that you use 10pt font, leave a single blank line at the top, follow that with a 12pt title in bold, skip a line and enter the text. Do not leave an extra line at the bottom.

Modification of an existing document is basically the same except you use an existing template and don't have to specify the filename, title, or category.

## Modify or Create Doctor Note templates

Click on **Add or Modify Instructions**.

Click on the **Doctor Notes** button.

Select new or existing.

If you are creating a new note:

- accept the suggested file name.
- input the title you wish to display for the instruction in the patient instruction list.
- click on any of the tokens you will want the user prompted for. Click on NEXT.
- click on the category the instruction is to be listed under. Click on NEXT.
- accept the default language by clicking NEXT.
- click FINISH.

To format the instruction, it is suggested that you use 10pt font, leave a single blank line at the top, follow that with a 12pt title in bold, skip a line and enter the text. Do not leave an extra line at the bottom.

Modification of an existing document is the same except use an existing template. You do not have to specify the filename, title, or category.

# CHANGING THE SYSTEM CONFIGURATION

## *The Configuration Table*

There are a large number of system features that can be modified by the user. These modifications are done through the Configuration Table Dialog which is accessed through the Database Utility Dialog. By this point you probably already know where that is, but for review, you click on the Settings option on the main menu bar, then SuperDOC! System and Data Table Settings. The Configuration Table is the top button on the left.

This button will activate a “tab” dialog box. What this means is that the dialog is supposed to look like a series of files, where the tabs indicate what is contained in that file. To get to the tab contents, you click on the tab with the mouse.

## Changing the Organization Name, Address, and Phone Number

The first tab is used to change these settings in every template that uses the relevant tokens (tokens are covered elsewhere). The reason why you want to use the system tokens is because you only have to change the data once, here, and it will be changed in every instruction it is used in.

## Changing the location of the patient and template data

The second tab indicates where information is stored in the computer. For instance, if you wanted to move the SuperDOC! program to a different directory, you would need to inform the program where the data resides by updating these settings. This area needs to be modified for systems that are networked (see the section of documentation on networking for more information).

It may also be necessary to change the settings in MicroSofts ODBC facility if the database (a file called SD.MDB located by default in the ../SuperDoc/ directory) has been moved. You do this from the main desktop by going into **Start->Settings->Control Panel**, clicking on **ODBC32**, double clicking on the **SD** data set, and then clicking on the **Select** option. This displays a typical MicroSoft file dialog. If you are not sure how to complete this process, call us.

## Using different or multiple header, trailer, or prescription forms.

The third tab specifies the “templates” used to create the output document. It is possible that multiple versions of a template are required. For example, one site has one workstation set up for physician assistants and doctors and another workstation set up for just doctors.

## Specifying patient account numbers and/or address information

The fourth tab indicates whether the user must enter a patient account number and/or address information. If an account number is required, the user can set the required number of digits.

## Turning off the Display Tutorial Dialog? question at start-up

The fourth tab indicates whether this question is asked.

## Changing the number of saved patients before a purge request

By default, the system is set to ask the user at program start-up if they want to purge old patient data after 1500 patient records have been saved. This number can be changed to whatever you would like, but the Windows 95 operating system appears to have some trouble after 5000.

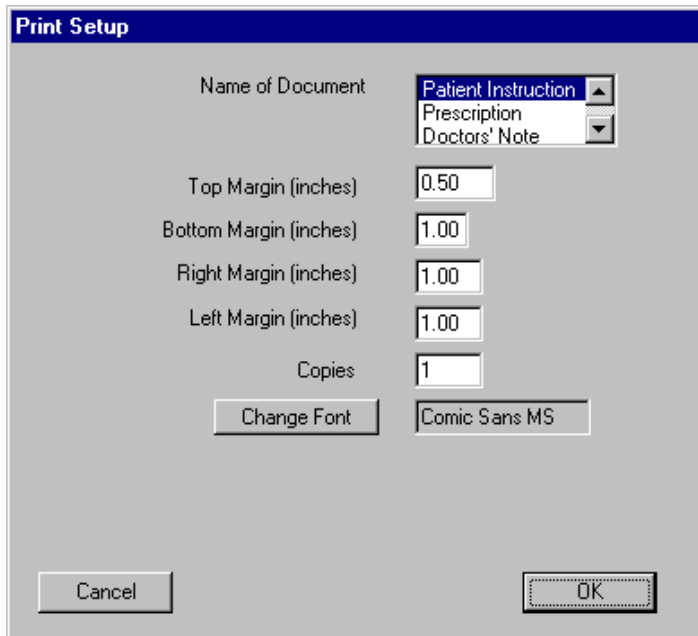
## The Printer Table

Changing the margins, font, and number of copies printed.

The user can set individual font, margin, and copy settings for each type of document printed. Do the following starting at the main SuperDOC! window. Click on

- **Settings** in the Menu Bar at the top of the menu
- Select **SuperDOC! System Data Table Settings**
- Click on **Printer Table**

The following window will be shown:



The image shows a 'Print Setup' dialog box with a blue title bar. It contains several input fields and buttons. The 'Name of Document' field is a dropdown menu with 'Patient Instruction' selected, and 'Prescription' and 'Doctors' Note' are visible below it. The 'Top Margin (inches)' field is set to 0.50, 'Bottom Margin (inches)' to 1.00, 'Right Margin (inches)' to 1.00, and 'Left Margin (inches)' to 1.00. The 'Copies' field is set to 1. There is a 'Change Font' button and a font selection field showing 'Comic Sans MS'. At the bottom, there are 'Cancel' and 'OK' buttons.

Name of Document	Patient Instruction
Top Margin (inches)	0.50
Bottom Margin (inches)	1.00
Right Margin (inches)	1.00
Left Margin (inches)	1.00
Copies	1
Change Font	Comic Sans MS

After changes have been made, the program must be restarted to initialize the printers with the new values.

## APPENDIX

### Template Tokens

#### Custom or real-time Prompts

One special token is the double greater-than less-than characters (e.g. “<< *prompt to be displayed to doctor* >>”). This causes SuperDOC! to display a message box with whatever you put between the two less than greater than signs (i.e. “<<>>”) as the prompt. Whatever the user inputs is then inserted into the template. It should be able to be used in all templates, including the header and trailer.

#### Prescription form template tokens

<Rx_Sig>	SIG
<Rx_Name>	Medicine Name
<Rx_Disp>	DISP
<Rx_Rx>	Prescription
<Refill_Qty>	Refill Quantity
<Refill_No>	Number of Refills
<Dispense>	Formulary or voluntary dispense
<yes_subs>	“YES” (Substitutions)
<no_subs>	“NO” (Substitutions)

#### Tokens available to all templates

<Patient_Name>	Patient name
<Patient_Address>	Patient Address
<Patient_City>	Patient City
<Patient_DOB>	Patient Date of Birth
<Account_Number>	Patient Account Number
<Date>	Creation Date (MM/DD/YYYY)
<Print_Date>	Date when printed (MM/DD/YYYY)
<Time>	Date and Time (Long Date and Time)
<+ n>	Calculate the date n days from today (note space after ‘+’)
<+Ask_Date>	Prompt for number of days and then calculate date
<Doctor_Name>	Doctors Name
<Doctor_Number>	Doctor Number
<Assistant_Name>	Physician Assistant Name
<Org_Name>	Organization Name
<Org_Phone>	Organization Phone
<Org_Address_One>	Organization Address Line 1
<Org_Address_Two>	Organization Address Line 2
<Org_City>	Organization City
<Org_State>	Organization State
<Org_Zipcode>	Organization Zipcode

#### Doctor note template tokens

<Return_Date>	Return date
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#### Follow-up note template tokens

<Referral_Text>	Invokes editor to create text that is saved - used for physician notes
<By_Date>	Date to take action by
<Referral_Name>	Referral doctor’s name
<Referral_Phone>	Referral doctor’s phone
<Referral_AddressOne>	Referral doctor’s address line 1
<Referral_AddressTwo>	Referral doctor’s address line 2

<Referral_City>	Referral doctor's City
<Referral_State>	Referral doctor's State
<Referral_Zipcode>	Referral doctor's Zipcode
<Referral_Org>	Referral doctor's organization

## ***Installing SuperDOC! on a network***

SuperDOC! can easily be setup on a network. The main reason for networking the product is that it is much easier to maintain a single set of data and programs. The only thing required is to make sure that the operating system knows where to find SuperDOC!, and SuperDOC! knows where to find its data.

It is necessary to know something about filenames. To specify a network file, the format is : \\ <network name>\<share name>\<path>. As an example, for a workstation named "ER" having a shared drive named "Z" and a SuperDOC! directory path of

Z:\Program Files\Superdoc, the netpath name would be:

\\ER\Z\Program Files\Superdoc

There are **three areas** that need to be addressed:

- the location of the ODBC datasource for the SD database;
- the location of the executable files;
- the location of the data directories (help, patient data, and templates).

*The first thing that you need to do is to run the install program and point to the file server for the installation directory.* If you already have installed it on a local workstation, you can just move the directory to the file server. Read, Write, Delete permissions must be provided for the Template Data and Patient Data directories for the users of the system.

*The second thing to do is to use the ODBC facility to point the SD datasource to the file server on each workstation using SuperDOC!.*

*The next thing to do is to create a shortcut to the sd.exe file in the SuperDOC! directory on the file server for each workstation using SuperDO!.* Replace the shortcut in the SuperDOC! program group if the install program was used on the local workstation, or create a shortcut on the Desktop if the install program was not used.

*Finally, for one time only, check the location of the data directories in the database to make sure they point to the right place.* Instructions for this are provided below.

## **Specifying a networked database**

The Microsoft operating system takes care of the location of the database through ODBC 32. Use MicroSoft's ODBC 32 program in the Control Panel to set the location of the SD data source. From the desktop that would be:

- click on **Start**
- click on **Settings**
- click on **Control Panel**
- click on **32 Bit ODBC**
- **double-click** on **SD**
- click on **Select**
- click on **Network**
- Windows will need to map a local drive for the networked computer
- you should be able to select the location

This last part is probably going to be somewhat obscure for individuals not used to MicroSoft's way of mapping network drives.

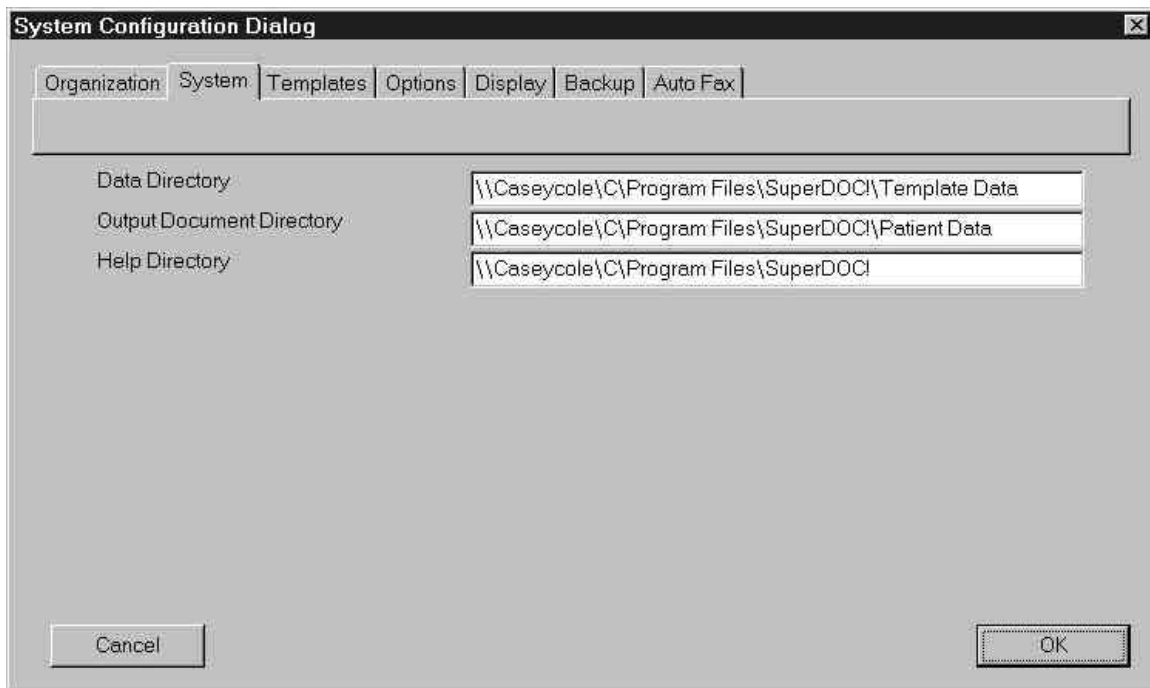
## **Specifying a networked template and patient data directories**

The following information resides in the database, and *because every workstation will be using a common database, it only has to be done once.*

Use SuperDOC!'s Configuration Table Dialog to set the location of the patient data, help, and template data directories. From the initial main menu:

- click on **Settings** in the main Menu Bar
- click on **SuperDOC! System Data Table Settings**
- click on **Configuration Table**
- click on the **SYSTEMS** tab

Here is an example of what should be displayed and an appropriate network name:



Remember that these directories need to be fully qualified with the network computer name if a networked directory is being used. See the introduction to this section for more information or the Help facility in Windows. This is important because every workstation must agree where that information resides. If you use a “mapped” drive name instead of a “network” name you run the risk that the two workstations will use their local drive mappings.

### **A Warning: Keep your system centralized**

SuperDOC! is designed to work on a network. The database, template and patient data, and the programs should be located on a central file server. The reason why you would want to do this is because it is easier to maintain. SuperDOC! is flexible, and would allow the user to put each of the pieces on a different computer system, but it almost guaranteed to be difficult if not impossible to maintain.

A common error is to put the database on a file server, but specify the local workstation for the template or patient data. What happens is that when an instruction is created or modified on one workstation, only that workstation will have access to the changed information. In a similar manner, a program update will only affect the workstation initiating the update. **Keep it simple. Put everything on the file server.**

The easiest way to set the executable file locations is to:

- use Windows Explorer to display the networked SuperDOC! directory.
- **right-click** and then **copy** the SD.EXE onto the scratch pad
- click on the local desktop, **right-click** and **Paste Shortcut**

## Novell installations

The program runs on Novell networks. Enable long file names.

## Multiple configurations (Wide Area Networked ) SuperDOC!

SuperDOC! is designed to support multiple sites on a common network. This allows for multiple hospitals or departments to use a common set of data, but maintain site specific information like organization name, address, and user names . One restriction is SuperDOC! maintains only a single list of referral doctors.

***This is easy to do, but there are licensing considerations. If you are running the program at a single physical site, only a single license is necessary. Multiple physical sites will require a multi-site license. Contact us for more information.***

## ***Creating Reports from the Database***

SuperDOC! is based upon widely used computer software standards. A benefit of this approach is the ability to utilize other software packages with the SuperDOC! system.

*Many software packages exist for creating reports from data stored in an ODBC database. Because SuperDOC! uses the ACCESS database, MicroSoft's ACCESS database software is an obvious choice. With this type of software, the user is free to create whatever external systems or reports they might require.*

## Trouble Shooting

### Printers

Most problems are associated with getting dot matrix printers to work with Windows. The common sources of problems are:

- bad Window drivers
- inability of the dot matrix printer to handle faster EPP parallel ports
- inability of the printer to handle a font type

First set the computer BIOS to just standard parallel. The second thing for OKIDATA 320 users is the known good driver for the OKIDATA 320 Microline included on the install disk. The third thing is to change the font. See the section on modifying the prescription form.

For dot matrix printers using forms be sure to set the custom form size through the printer control panel outside of SuperDOC!. In other words, you have the ability to override the paper size in the Print Dialog shown during a SuperDOC!session the first time you try to print, but this is temporary. Change it through **start->settings->printers** from the main Windows desktop. This will be permanent, and you won't have to reselect. This also means that if **a custom page size setting exists for a printer, then SuperDOC! will use it for prescriptions.** Basically the program queries Windows to see if special settings are available, and if they are, to use them. So if you don't want the special settings to be used, be sure that the custom form settings are empty.

For laser printers, the most significant problem appears to be trying to print a prescription to a laser printer that has the page margins set to 0 or near 0. The prescription printer's margins are set to 0 by default. This can be changed through the Database Utility Dialog's **Page Setup Button**.

### Corrupted database

It is pretty hard to corrupt the database. However it can happen if the computer system crashes. A message will be displayed indicating a corrupt database. To correct from the Windows desktop:

- click on **Start**
- click on **Settings**
- click on **Control Panel**
- click on **32 Bit ODBC**
- **double-click** on **SD**
- click on **repair** (it may ask if you want to replace the database - answer yes)
- click on **compress**

### SuperDOC! takes longer to load

This clearly should not be an issue with the newer computers having 266+ megahertz processors with 64mb. This system should load in seconds.

For those using older computers computer, memory is the most common culprit. The more programs that you having running simultaneously with SuperDOC!, the more memory you will need. 32mb is the recommended amount and is more than sufficient for just SuperDOC! and Windows. However, if you are a "power user" and like to have numerous programs running in the background (or foreground), then purchase another 32mb. It's a cheap way to enhance performance.

The size of the database will increase with use. Most of the increase is wasted space. Therefore you can increase performance by compressing the database. Read the article on "Corrupted Database" for more information on how to do this through MicroSoft's 32bit ODBC utility.

### Downloading the most current version of SuperDOC!

You will need access to the internet to update your SuperDOC! Simply go to the **Online** menu option option, and select "...update". This will take you to the web page that is specific to the version you are on.

The browser usually asks whether you want to run the program directly or download it to your local hard drive. The benefit of updating directly is that it is quicker and you do not have to find the download file after it has been downloaded. The drawback is that if anything goes wrong, you have to download the program again.