

# User's Manual

## CAREpoint EMS Workstation

### D-Scribe Reporting System

**EDITORS NOTE – FORM BUILDER IS A PART OF D-SCRIBE'S REPORTING SYSTEM (D-SCRIBE'S FORM BUILDER). FORMS WHICH ARE CREATED AND/OR USED ARE REFERRED TO AS "D-SCRIBE REPORTS", "REPORT FORMS" OR "REPORTS".**

#### 1 Overview

This section contains information for the CAREpoint EMS Workstation's **D-Scribe Reporting System**, which consists of

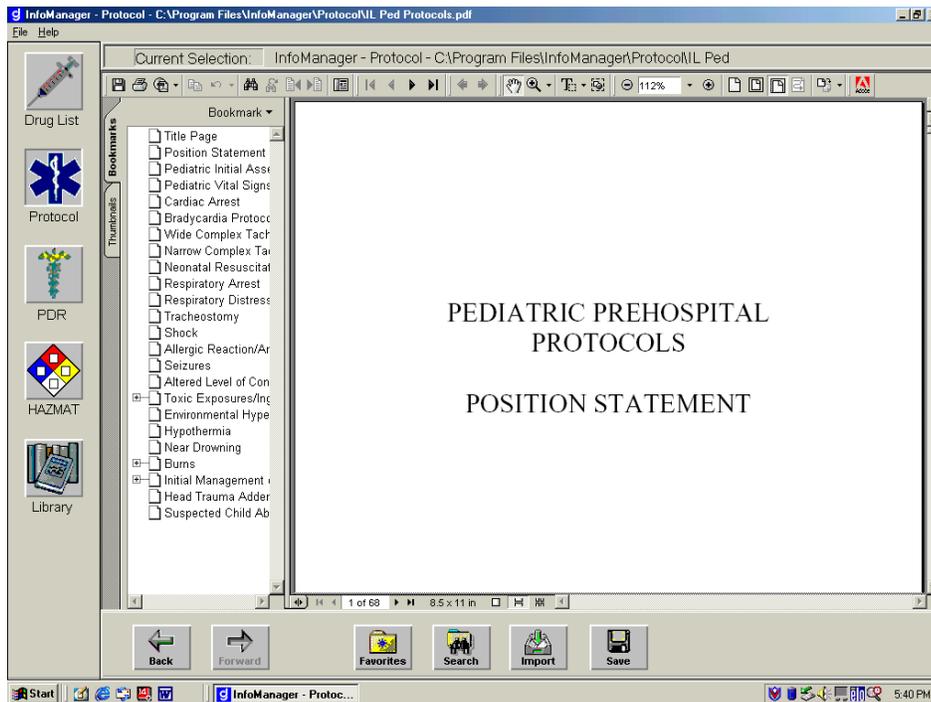
- 1) **Form Builder** software resource, which provides a means of creating electronic forms,
- 2) **D-Scribe Reviewer**, which provides a means of reviewing information contained on completed report forms,
- 3) **D-Scribe Data Miner** software resource, which provides a means of sorting, searching and compiling data gathered from completed report forms, and
- 4) **Custom Data Reviewer**, developed independently by users.

#### 2 Description of Form Builder

D-Scribe's Form Builder provides an easy-to-use tool for creating the electronic forms that are part of CAREpoint's reporting and data-gathering process. These forms, which may be designed and created on any Windows-based desktop computer, are intended to be completed (filled out) on the CAREpoint EMS Workstation. As D-Scribe Reports, the information they contain may be used for a wide variety of information gathering purposes, including general call summaries, tracking special procedures, generating documentation for billing for services or documenting unusual calls. D-Scribe Reports that are completed on the CAREpoint EMS Workstation are automatically archived within the CAREpoint's D-Scribe digital logging recorder to provide a permanent record. Completed forms may be reviewed and the data analyzed by a variety of means, both on the CAREpoint EMS Workstation itself, and on other computers.

Common Windows control schemes have been used so that anyone familiar with Windows type software applications will immediately understand Form Builder's operation. Those who are unfamiliar with Windows applications may require some additional practice time to gain proficiency with Form Builder.

Using Form Builder consists of four separate activities; 1) Generating (creating) reporting forms; 2) Completing Reporting Forms; 3) Archiving gathered data and; 4) Reviewing data. Each of these activities is described in this manual.



**Figure 1, Form Builder Screen**  
**3 Getting Started With Form Builder**

### 3.1 Installing Form Builder on a Desktop PC

The D-Scribe Form Builder may be run on any standard Windows PC as a desktop application and is installed using the CAREpoint EMS Workstation’s Desktop Applications CD.

NOTE! The contents of the CAREpoint EMS Workstation Desktop Applications CD may be used only in accordance with the terms described in the license issued by General Devices for that CD (and its contents).

The CAREpoint EMS Workstation Desktop Applications CD is installed using an Install Wizard, which will automatically guide you through the entire installation process. Unless otherwise specified, the files are installed in the Program Files folder, under the folder name “GENERAL DEVICES”, which includes the Form Builder application.

### 3.2 Opening Form Builder on a Desktop PC

Form Builder is opened from the Windows Desktop Screen as follows:

START>All Programs>General Devices>Form Builder

The Form Builder screen (See Fig XX) provides a set of icon-based control keys at the top of the screen.

## 4 Form Builder Control Keys

## 4.1 Overview

The D-Scribe Form Builder is designed around standard Windows operating commands and schemes. Those familiar with Windows type software applications will quickly learn how to use Form Builder. Those who are unfamiliar with Windows applications may require some additional practice time to gain proficiency with Form Builder.

### 4.1.1 Wizard Operation

Form Builder makes extensive use of “Wizards” to guide the user through various operations. All Form Builder Wizard use a common scheme, common terminology and common error prompts (i.e.: a prompt appears if you forget to make a required selection). Each Wizards concludes its operation with a FINISH key, after which the newly created item appears on the “paper” and must be MOVED to the desired location on the “paper” and then SIZED to the desired size. These operations are done by placing the cursor on the item, holding down the LEFT mouse key and dragging the item to where it is to be placed. Sizing is done in much the same manner, using the BOX, CORNER, VERTICAL and HORIZONTAL tabs. To permit optimal utilization of the “paper”, EACH component of the entry item is positioned separately.

Forms may be viewed as they will appear on paper at any time using the Form Preview command. Frequent use of this command during the form creation process will greatly assist the development process.

### 4.1.2 Wizard Terminology

Form Builder Wizards use a common set of terminology, as follows:

- **DATA ENTRY** is used to define the actual data entered when the form is used.
- **ALIGNMENT** is used to identify how you wish the LABEL (or Data to be placed.
- **FONT** is used to specify the type and size of font used from a standard Windows list of font styles, size, effects and colors.
- **BACKGROUND** is used to determine the background of the label, selecting between a transparent background (text appears on the “white” paper, or opaque, where the text appears within a colored background.
- **NUMBER OF CHARACTERS** is used to determine the physical size (on the “paper”) of the entry field as well as the maximum numbers of characters that the field can hold.
- **SINGLE LINE/MULTI-LINE DATA ENTRY** is used to determine if the data to be entered is to be on one or more than one line.
- **VOICE ENTRY** is used to identify data entry fields that may be completed by voice entry. In such cases, the data is entered as a voice narrative, which can be played back for later review. This provision is particularly useful when documenting “narrative” type descriptions. CAREpoint does NOT convert the voice into text. Voice entries are stored (archived) as WAV files as a permanent part of the form. If the completed form is e-mailed, the voice

entered narrative will accompany all other data and may be played back on any computer that accepts WAV files.

#### **4.1.3 Standard Windows Functions**

Form Builder uses certain standard Windows functions to control various functions. These functions are located in the left side of the upper task bar and are described as follows:

- **File:** Standard Windows commands (New, Open, Form Preview, Save As, Print, Print Preview, Print Setup, Exit)
- **Edit:** Standard Windows commands (Undo, Cut, Copy, Paste, New Item)
- **View:** Standard Windows commands (Page Width, Whole Page)
- **Help:** Standard Windows commands (Form Builder, About Form Builder)

#### **4.2 Form Builder Command Keys**

Form Builder uses a set of Icon Based Command Keys to control its main functions. These keys are located at the top of the Form Builder screen and are described as follows:

##### **4.2.1 New Form**

Used to create a new form. This key initiates a pop-up box requesting the size (width and height) of the form. After specifying these sizes, a “paper” of the specified size appears on the screen. Data entry items will be placed on this “paper” using the Add Item key.

##### **4.2.2 Open Form**

Used to open an existing form, this key initiates a pop-up box requesting the form name.

##### **4.2.3 Save Form**

Used to save the form currently on the screen, this key initiates a pop-up box that requests the file name. Be certain to follow the file-naming rules that are shown in the pop-up box.

##### **4.2.4 Form Size**

Used to set (or change) the size of the “paper”, this key initiates a pop-up box that permits specific the size of the “paper” the form is to be printed on.

##### **4.2.5 Add Item**

Used to add a data entry item (or field) on the “paper” form, this key initiates a Form Entry Pop-Up Wizard that appears after selecting a data entry “type” and pressing the NEXT key. The Form Entry Wizard then guides you through the form creation process by requesting the specific information that is to appear on the actual form. The Wizard may be moved (positioned) on the screen by placing the cursor on the BLUE region, holding the LEFT mouse button down and repositioning the cursor. Be sure the bottom of the Wizard (NEXT box in the lower right corner) can be seen.

The following is a description of the different types of entry fields that may be used:

- **Text or Number Entry:** Used for entering numbers or text into a labeled field. See example in selection box.
- **Single Choice Select:** Used for selecting one item from a group of predefined items that appears on the page. The buttons are referred to as “radio buttons”. See example in selection box.
- **Single Choice Dropdown Select:** Used for selecting *one* item from a group of predefined items that appears within a dropdown box. See example in selection box.
- **Line:** Used to create a horizontal line on the “paper”. Line thickness and color are user selected. See example in selection box.
- **Multiple Choice List:** Used for selecting *multiple* items from a group of predefined items. Those items that are selected are identified by *highlighting the selected item*. See example in selection box.
- **Multiple Choice Select:** Used for selecting *multiple* items from a group of predefined items. Those items that are selected are identified by the *appearance of an X in the checkbox of the selected item*. See example in selection box.
- **Text heading:** Used to display the name of a form or a section within a form. There are no entries associated with this function.

#### 4.2.6 Edit Item

Used to modify an existing entry field or label. Upon selecting the item to be modified (place cursor and left click) the Edit Item key initiates a Form Entry Pop-Up Wizard that allows modification of the desired item. Edited items retain their current position and size.

#### 4.2.7 Delete Item

Used to delete an item (text, data entry field, line, etc.) on the “paper” form, this key initiates a Pop-Up box requesting confirmation before the item is deleted. Once deleted the item, along with any associated data are discarded and cannot be retrieved.

### 5 Creating Forms Using Form Builder: A Step-By-Step Tutorial

Creating D-Scribe Report forms using Form Builder is very easy to do, but, just as with all computer programs, some time must be spent learning how to use it. The best and easiest way to start is by taking an existing paper form and re-creating it as an electronic form.

Open Form Builder by the START>All Programs>General Devices>Form Builder sequence.

When the Form Builder screen appears, click New Form. Enter the form size (width and height). Click Add Item and select Text Heading. The entered text, in the selected size, font and color can be used as the title of the form. Select the text that appears and move it to the desired location on the form (click, drag and resize). Click Add Item again and select Line (select thickness and color). Place a line below the title text (Click, drag and resize). Click Preview to see how the text and the line will appear on the form. Click Exit Preview (lower right) to return to the editing screen. To change

the text, select the heading text and click Edit Item. Change the text to a new text. Note that the size and position are unaltered. To reposition the text (or line), click, drag and resize to where you want the text to be moved to.

If you want to change the size of the paper, click Form Size and enter a new size. The screen will automatically adjust to the newly specified size.

Repeat this process for each of the item types you wish to use.

Save the form by clicking the Save Form key. Enter the form name (be sure to follow naming rules) and click OK.

Form Builder may be exited by using the Windows File Command (File>Exit).

Open Form Builder again (START>All Programs>General Devices>Form Builder).

To re-open the form, click the Open Form key. A list of existing forms will appear. Choose the form you wish to open and click OPEN.

**HINT!** Be sure to include a form number and creation date with provision for a REVISION number and revision date as a text item on the form. This will help in keeping track of form revisions.

**HINT!** If forms are changed on the CAREpoint Workstation, be sure to update the record of that form on any desktop computers that are used in conjunction with CAREpoint. IT IS VERY EASY TO LOSE CONTROL OF REVISIONS!

## **6 Using D-Scribe Report Forms On CAREpoint**

### **6.1 Overview**

D-Scribe Report forms are created on any standard desktop computer using Form Builder (described above). These report forms are intended to be run on the CAREpoint EMS Workstation, and completed (data entered) during or subsequent to a call using CAREpoint's touch screen, keyboard or by voice entry. Completed report reports are permanently stored on the D-Scribe Logging Recorder. Reports may be reviewed and the data assessed on the D-Scribe Review Screen, by the D-Scribe Data Miner, or by third party software.

Note! Moving and deleting report forms from a desktop computer requires network privileges and cannot be performed without these privileges.

### **6.2 Transferring Report Forms to CAREpoint**

D-Scribe forms created on a desktop computer may be transferred over a network or by floppy disk to the CAREpoint EMS Workstation where they are actually used.

- **To Transfer Report Forms By Network:**

- 1) **At The Desktop Computer**, open Window's Explorer and locate C:\CAREpoint\Form on the CAREpoint EMS Workstation.

Copy the form to be transferred from the desktop to the Workstations folder C:\CAREpoint\Form using standard Windows Explorer copy and paste commands.

- 2) **At The CAREpoint Workstation**, type “#form” (#-3-6-7-6) on CAREpoint’s display screen keypad. This will open the Form Builder program on the CAREpoint EMS Workstation.

Using Form Builder’s “OPEN FORM” key, open the report form just added.

The selected report form will open and appear on the Form Builder screen.

Using Form Builder’s “SAVE FORM” key, save the opened report form. A pop-up will appear verifying that the form has been successfully saved.

The report form is now entered into the D-Scribe Reporting systems data base.

**NOTE! The above OPEN and SAVE steps are REQUIRED to utilize newly entered report forms.**

Exit the Form Builder program using the Windows “FILE” (Upper left key) and “EXIT” commands.

On CAREpoint touch screen, type “#bye” (#-2-9-3). Restart the CAREpoint program by START>CAREpoint.

Check that the report form has been entered by clicking CAREpoint’s “FORMS” button and open the newly entered form.

Complete all entries with test information.

When the report is reviewed (see below), the appearance of the previously entered test data will confirm that the process has been successfully completed.

**NOTE! If multiple forms are transferred, the above process must be completed for each report form.**

- **To transfer report forms by floppy disk:**

- 1) **At The Desktop**, computer, open Window’s Explorer and locate C:\CAREpoint\Form on the CAREpoint Workstation

Copy the report form to be transferred from the desktop to the floppy disk.

- 2) **At The CAREpoint Workstation**, Type “#explore” (#-3-8-7-5-6-7-3) at CAREpoint screen and copy the report form from the floppy drive to C:\CAREpoint\Form.

Follow the instructions for transferring report forms by network (see above), starting at “2) **At The CAREpoint Workstation**”.....

### **6.3 Using D-Scribe Reporting Forms on CAREpoint**

D-Scribe report forms are completed (filled out) on the CAREpoint EMS Workstation during or subsequent to a call. Once completed, the report data is automatically archived by CAREpoint’s D-Scribe Data logger and available for later review at the Workstation or a networked desktop computer.

Once reports are saved, they are archived and cannot be modified or altered in any way.

- To complete a D-Scribe Report on the CAREpoint EMS Workstation during or after a call:

Click the “FORMS” button on CAREpoint display screen. Select the desired report form. The selected report form will open and the form may be completed (data entered) using CAREpoint’s touch screen, keyboard/mouse, or voice entry means. CAREpoint’s push-to-talk handset is used for voice entry.

When the report form is completed, click the “SAVE” button and the completed report is entered into the D-Scribe Reporting System data base.

#### **6.4 Reviewing D-Scribe Reporting Forms on CAREpoint**

D-Scribe Reports may be reviewed and the data assessed either on the CAREpoint EMS Workstation or on another (networked) desktop Windows-Based computer. Reviews may be conducted on the D-Scribe Review Screen, by the D-Scribe Data Miner, or by third party software.

An abbreviated instruction of how to review D-Scribe Reports on CAREpoint or a networked desktop computer using the D-Scribe Reviewer is provided below. A complete description of the D-Scribe Reviewer is providing in the D-Scribe Section of the CAREpoint User’s Manual.

- To review D-Scribe Reports on the CAREpoint Workstation:

Click the “D-SCRIBE” button on the CAREpoint Display screen (this button may be available directly or through the “MORE” button. The D-Scribe Review Screen will appear.

The D-Scribe Review screen presents a graphical representation of all call activity. Calls that have Report Forms associated with them are identified by a “form” icon. Clicking on a form icon will open that form and present it on the CAREpoint screen.

To present a list of calls that have forms associated with them, click the “Forms Entries” box in the “Show” selection listing (located in the middle of the screen). Clicking on a form in the list will open that form and present it on the CAREpoint screen.

- To review D-Scribe Reports on a networked desktop computer:

D-Scribe reports may be reviewed on a networked desktop computer in the same manner as on a CAREpoint Workstation (See above), except that the selections are made using a mouse.

- To review D-Scribe Reports on the D-Scribe Data Miner

To Be Supplied

- To review D-Scribe Reports by third party software.

The data base used in the D-Scribe Reporting System is an ODBC compliant data base. Under a separate license, General Devices will supply all necessary details to users interested in employing a custom data assessment means.

## **6.5 Editing and Deleting D-Scribe Reporting Forms on CAREpoint**

D-Scribe reports installed on a CAREpoint EMS Workstation may be deleted or edited as follows.

- **To Delete Report Forms By Network:**

At The desktop computer, open Window's Explorer and locate C:\CAREpoint\Form on the CAREpoint Workstation.

Delete the form from the workstation's folder using standard Windows Explorer delete commands.

The deleted form will no longer appear on the CAREpoint form selection list.

- **To Delete Report Forms At The CAREpoint Workstation:**

At The CAREpoint Workstation, Type "#explore" (#-3-8-7-5-6-7-3) at the CAREpoint screen and locate the report form to be deleted from the form directory, C:\CAREpoint\Form.

Delete the form from the Workstations folder using standard Windows Explorer delete commands.

On CAREpoint touch screen, type "#bye" (#-2-9-3). Restart the CAREpoint program by START>CAREpoint.

The deleted form will no longer appear on the CAREpoint form selection list.

- **To Edit Report Forms By Network:**

Editing forms on a networked desktop computer is very similar to creating forms on a desktop computer.

Follow the instructions for creating a form, except that the selected form will be one that already exists use the OPEN FORM command instead of the NEW FORM command.

Follow the same procedures for transferring the form from the desktop to the CAREpoint as for a new form.

When the edited form is entered into the CAREpoint Workstation's D-Scribe Reporting systems data base, it will automatically replace the older version and be used whenever that form is requested from CAREpoint.

- **To Edit Report Forms At The CAREpoint Workstation:**

At The CAREpoint Workstation, type "#form" (#-3-6-7-6) on CAREpoint's display screen keypad. This will open the Form Builder program on the CAREpoint Workstation.

Using Form Builder's "OPEN FORM" key, open the report form to be edited.

The selected report form will open and appear on the Form Builder screen.

Using Form Builder's editing features "Edit Item" and "Delete Item", make the necessary changes to the form.

Save the edited form using the "SAVE FORM" key. A pop-up will appear verifying that the form has been successfully saved.

The modified report form is now entered into the D-Scribe Reporting systems data base and will replace the older version and be used whenever that form is requested from CAREpoint.

Exit the Form Builder program using the Windows "FILE" (Upper left key) and "EXIT" commands.

On CAREpoint touch screen, type "#bye" (#-2-9-3). Restart the CAREpoint program by START>CAREpoint.

Check that the modified report form has been successfully entered by clicking CAREpoint's "FORMS" button and open the newly changed form. Complete all entries with test information. When the report is reviewed (see below), the appearance of this test data will confirm that the process has been successfully completed.

**HINT!** Be sure to include a form number and creation date with provision for a REVISION number and revision date as a text item on the form. This will help in keeping track of form revisions.

**HINT!** If forms are changed on the CAREpoint Workstation, be sure to update the record of that form on any desktop computers that are used in conjunction with CAREpoint. IT IS VERY EASY TO LOSE CONTROL OF REVISIONS!