HI★TRACK 4

Quick Guide for Users

Introduction

The HITRACK 4 Series represents the cutting-edge of EHDI Data Management. The HITRACK 4 database is built around a dynamic framework to provide the logic needed for managing the complex requirements of EHDI tracking and follow-up. The HITRACK client offers a task-oriented user interface and is designed for maximum flexibility.

The Windows Client offers all of the HITRACK functionality in a quick, responsive Windows application that requires minimal configuration. The Windows Client allows HITRACK users to run their own individual database, or they can connect to a remotely hosted database to access shared data.

The Web Client offers virtually the same interface and features of the Windows Client while providing the versatility of being able to securely access HITRACK from any computer connected to the internet.

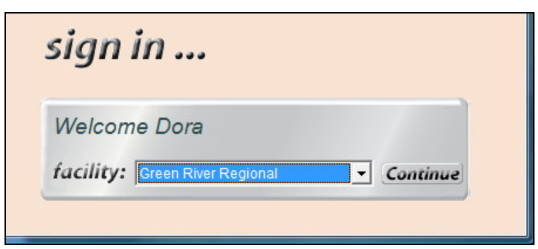
This Quick Guide will provide a basic overview of HITRACK and will help users to become familiar with the functionality and user interface of the software. It will also provide assistance in using HITRACK following a new installation. Please refer to the HITRACK 4 Installation guide for system requirements and installation instructions.

LOGIN SCREEN

To begin using HI★TRACK you will need to login:

1) Enter the Username and Password (passwords are case sensitive) that was entered during the installation process.

2) Click on the Start button or press the Enter key and the following box will appear:

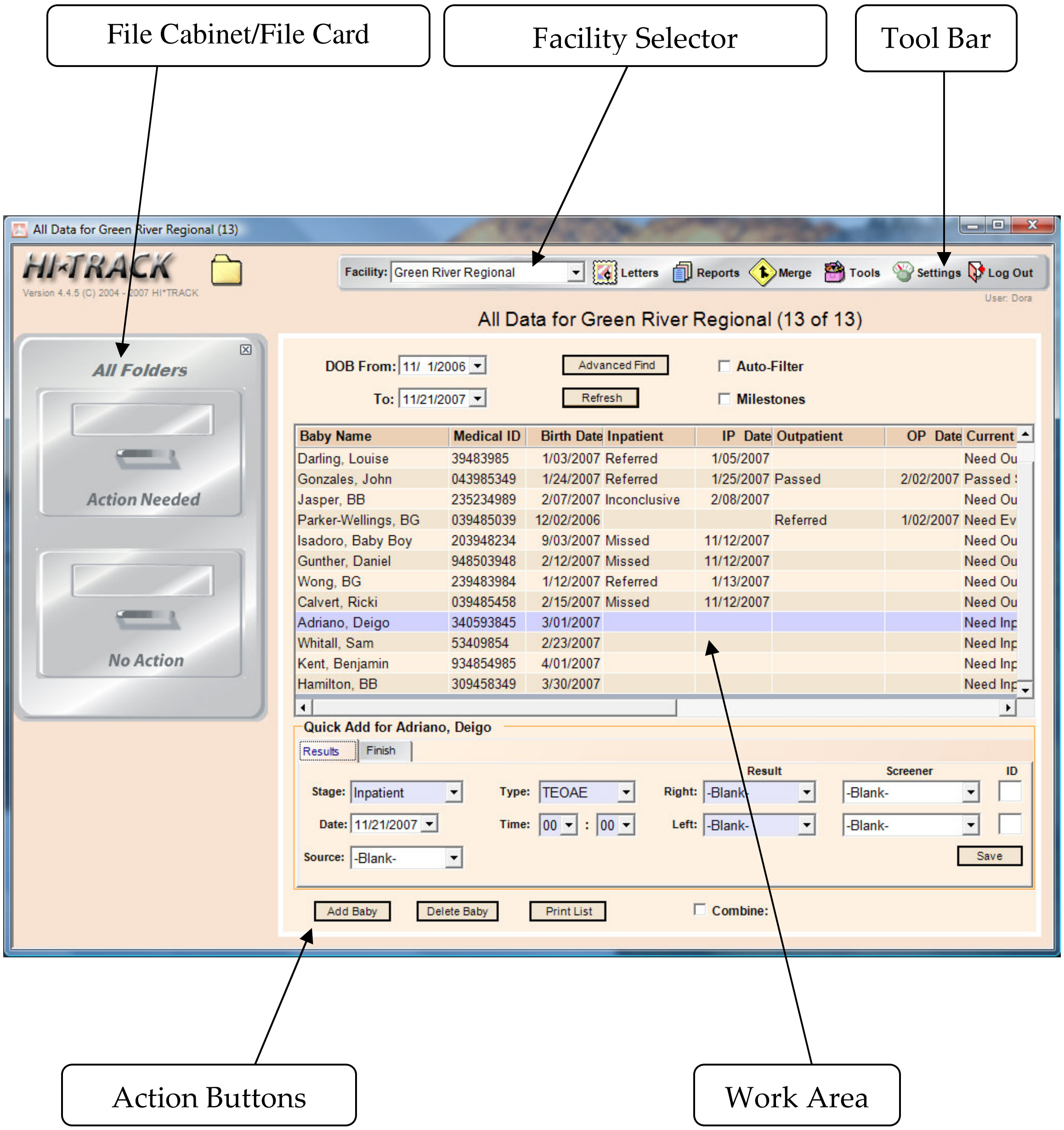


3) Click on the drop-down box and select a facility or facility group. Facility Groups are preceded by an asterisk.

4) Click on the Continue button or press the Enter key.

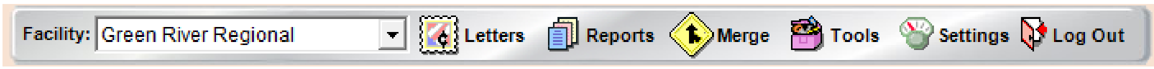
THE HITRACK USER INTERFACE

After successfully logging in the HITRACK user interface opens. The user interface is made up of the following sections:



THE TOOLBAR

The toolbar is located at the top of every screen in HITRACK.



On the left side of the toolbar is the facility or facility group that was selected after logging in. This can be changed at any time while logged in, as long as the user has approved access to other facilities. On the right side of the toolbar are several icons. A brief explanation of each icon will be given below.

Letters

The Letters postage stamp icon opens the letter queue for the selected facility or facility group. There are two tabs shown at the top – the Pending Letters tab and the Letter History tab.

Under the Pending Letters tab, users can view the list of letters waiting to be processed. The columns shown here are Baby, Letter, Recipient, Generate, Print, and Never Print. There is a **Process button** in the lower right corner of the screen to process the letters.

The Letter History tab provides a list of all of the letters sent by HITRACK. Date filters at the top of the screen help ~~to~~ narrow down the list of letters. The columns shown here are: Baby, Letter, Recipient, Generated On, Printed On, and Resend. These columns may be sorted by clicking on the column headers. There is a **Resend button** in the lower right corner to re-process a specified letter.

Reports

The Reports icon (looks like a stack of pages) opens the reports menu. Clicking this icon will display the following list of reports that can be generated:

- Screening Results Report -- Report screening results for babies.
- Outpatient Screening Report -- Report babies with outpatient results.
- Risk Indicator Report -- Report babies with risk indicators.
- Needing Evaluation Report -- Report babies who need continued evaluation.
- Hearing Status Report -- Report babies whose hearing disposition has been evaluated.

- Summary Reports – Summarize statistics by facility using the Flow Chart, Quarterly Report and more.
- CDC Survey Report – Report CDC survey data.
- Physicians Report -- Report babies grouped by Primary Care Provider.
- Screener Profile Report -- Report screener response rates.
- Needing Outpatient Report -- Report babies that need Outpatient Screening.
- User Defined Reports -- Create reports with user-specified columns and criteria.
- Data Cleaning Reports -- Generate reports to help in record consolidation.

At the bottom of the page is the **Select button and Cancel button**. Once a report is selected from the list, the user can customize the report through the Selection Criteria page using filters and options. A report is then created by clicking on the **Generate** button.

Merge

The Merge traffic icon opens the Merge screen. This screen is divided into three sections.

- Merge New Data – This section allows users to select a source (type of equipment or state transfer file) for merging and the path of the file to be merged.
- Pending Data – This section allows users to select a pending merge item to manually resolve potential duplicate records and other data entry problems detected during a merge.
- Merge History – This section allows users to review the history of past merges into HITRACK.

Tools

The Tool box icon opens the Tools screen with several tabs along the top. A brief description of each tab is given below.

- Program Information – HITRACK program information can be exported to a specified file to be imported by screening equipment software.

- Change Logs and Audits -- Allows users to view changes made to baby data after a selected start date.

- State/Regional Transfer – Provides an encrypted data transfer file for use in another HITRACK system at a State or Regional office.

- Back-ups/Conversion – Backup or restore a HITRACK database. Convert existing data from HITRACK 3.5 Desktop or Enterprise editions.

- Key Maintenance – Install encryption keys for State/Regional transfer data and other encryption key Tools.

- Advanced Tools – Refresh MCRs and classifications. Launch the Data Utility tool. Fix unknown codes. Set the rules for calculating the Most Conclusive Results. View the database history log.

 **Settings**

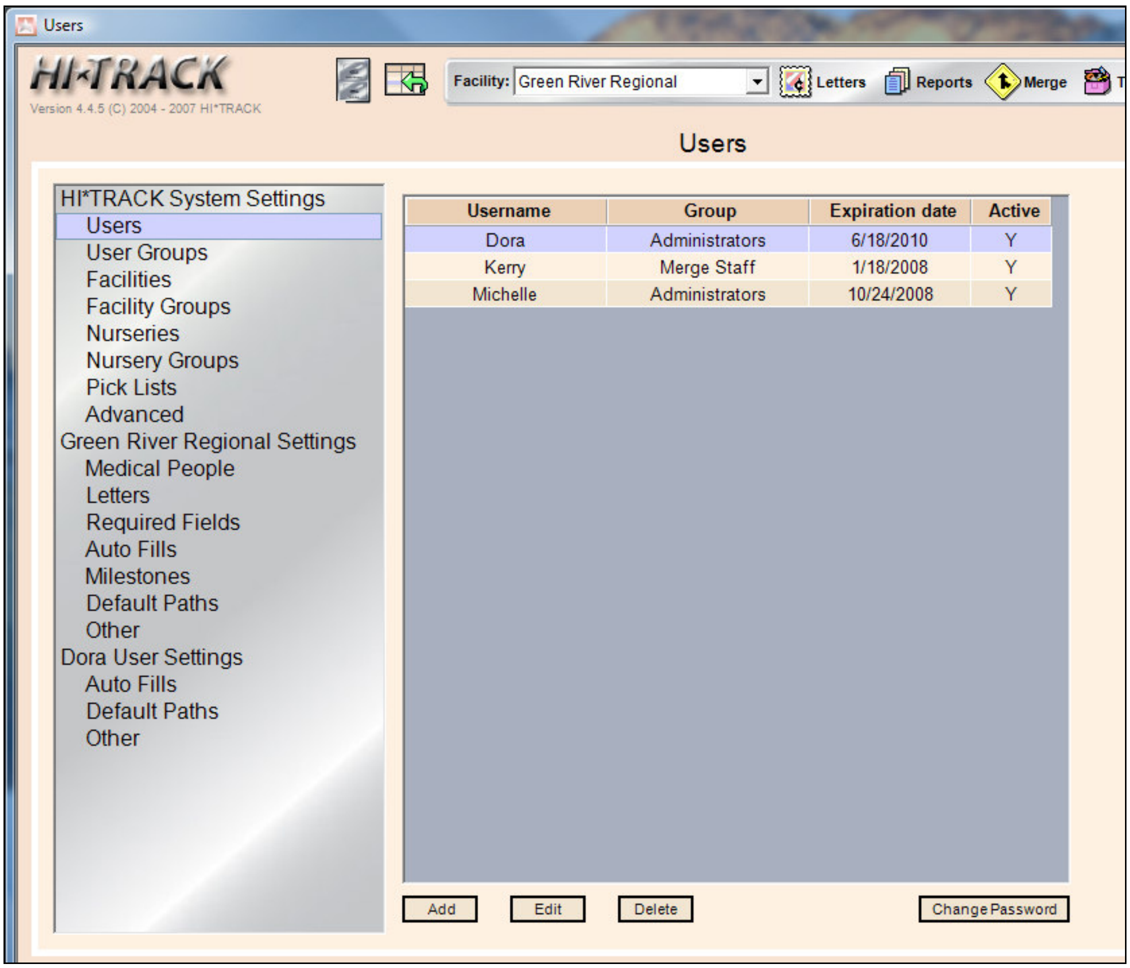
The dial icon opens the Settings screen to allow customization and administration of HITRACK.

 **Log out**

The exit door Log out icon will log a user out of HITRACK and return the Login screen.

SETTINGS AND ADMINISTRATION

On a new installation, there are specific items that need to be setup before you can begin entering baby data into the system. Click on the Settings dial icon in the toolbar in the upper right corner of the screen. This opens the first Settings screen shown below.



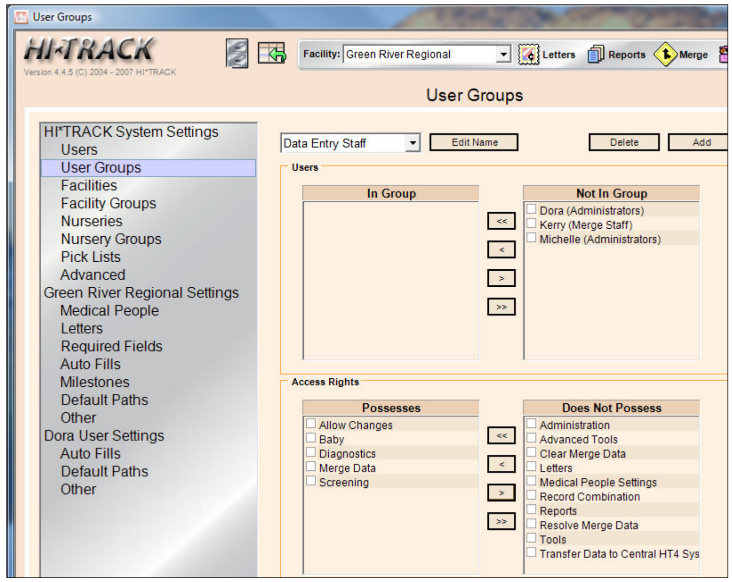
Settings are grouped into three categories listed on the left, system-wide settings, Facility specific settings and User specific settings.

Users List

The Users list is the first system setting and allows you to maintain a list of users, their passwords, expiration dates and facility assignments.

User Groups

The User Groups section allows you to assign access rights to the users within a group. Access rights provide security and allow administrators to control each user's ability to make changes to data and grant access to specified screens.

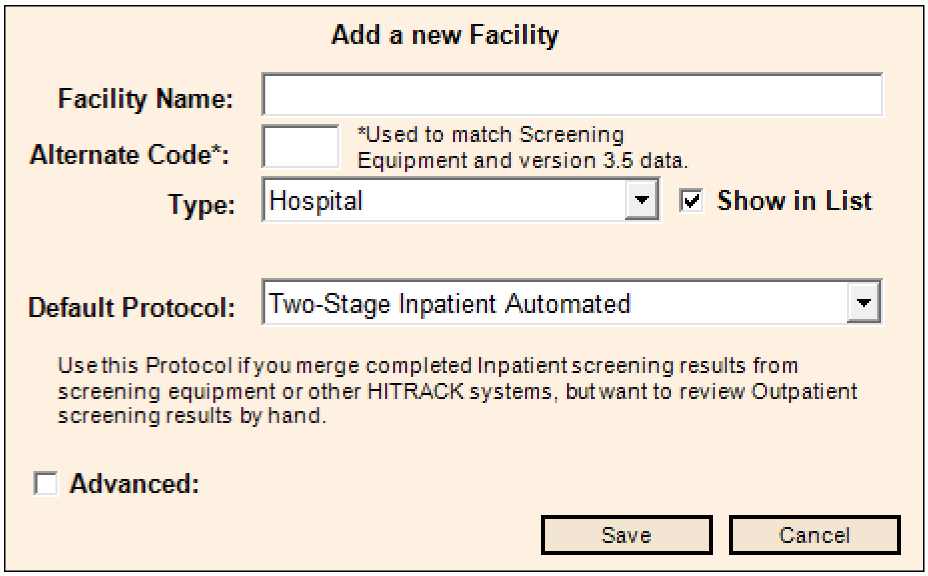


Listed below are some of the possible access rights.

Access Right	*Explanation*
Administration	Allows access to System-wide Settings.
Allow Changes	Any User Groups that need to allow users to make changes should include this Access Right.
Baby	Allows access to view the following baby related areas: Demographics, Tracking History, Risk Indicators, Letters, Recommended Actions, Transfer History and Record Overview.
Diagnostics	Allows access to Diagnostics, Hearing Disposition, Amplification and EI Services areas. Requires -Baby- Access Right.
Letters	Allows access to Letter features. Requires -Allow Changes- for Facility usage and the -Baby- Access Right to work with individual baby letters.
Medical People Settings	Allows access to view Medical People from the Settings Screen.
Merge Data	Allows basic access to Merge tool. Users can merge new data into the system. Requires -Allow Changes- Access Right.
Reports	Allows access to the Reports. (Creating new User Defined Reports requires the -Allow Changes- Access Right.)
Screening	Allows access to view the Screening area. Requires -Baby- Access Right.
Tools	Allows access to basic Tools, including Key Maintenance, Change Logs, Exporting Program Information, the Database Manager and Conversion tools.

Facilities

Under the Facilities tab, you may add or edit facilities to HITRACK. Once the Facility details are entered you can specify facility contact information for letters and set up merge sources. Clicking the **Add button** at the bottom of the Facilities tab will present the following screen.



This screen allows you to set the Protocol for a facility. HITRACK's Hearing Screening Protocol Engine™ is a rule-based system that governs how infants are tracked. Based on the screening protocol selected by the Screening Program Coordinator, infants' records can by filed into folders to help you track their hearing evaluation.

Listed below are the available protocols along with usage information.

Protocol	*Use if…*
Two-Stage Automated Pass/Manual Non-Pass	Use this Protocol if you want to manually review Inpatient and Outpatient results for infants who have not Passed.
Two-Stage Automated	Use this Protocol if you merge completed Inpatient and Outpatient screening results from screening equipment or other HITRACK systems.
Two-Stage Manual	Use this Protocol if you want to manually review Inpatient and Outpatient results for all infants.
Two-Stage Inpatient Automated	Use this Protocol if you merge completed Inpatient screening results from screening equipment or other HITRACK systems, but want to review Outpatient screening results by hand.
Two-Stage Dual Equipment Auto-Pass Only	Use this Protocol if you want to require A-ABR tests for infants who did not pass OAE screening and keep an active list of infants who have not Passed. (Infants who do not Pass Outpatient must be finished by hand.)
Two-Stage Dual Equipment Automated.	Use this Protocol if you merge completed OAE and A-ABR Inpatient screening results from screening equipment. (Infants in Outpatient screening must be finished by hand.)
Single-Stage Dual Equipment* Automated	Use this Protocol if you merge completed OAE and A-ABR Inpatient screening results from third-party screening equipment. Infants who do not pass screening will be recommended for evaluation.
Single-Stage Dual Equipment Auto-Pass Only*	Use this Protocol if you want to require A-ABR tests for infants who did not pass OAE screening and keep an active list of infants who have not Passed. Infants who do not pass A-ABR screening will be recommended for evaluation.

*This protocol is available in version 4.4.6 and later.

After saving a facility, the **Merge Sources** button opens a screen to define the setup information needed to merge data into the HITRACK program. Merge sources included data from screening equipment software, hospital patient information system exports and data from other HITRACK databases.

Merge Sources for Green River Regional

Name/Type	Source Path
HITRACK ETF4 File - (HT4 Transfer File (ETF4))	C:\Merge Files\
Hosp. Admissions File - (Demographic Data (Expanded)	H:\Fileshare\
Physician List - (HT3.5 PI pednames.txt (pednames.txt))	H:\Fileshare\exports\
XML - (HT4 XML Data File)	W:\

The Contact Info button at the bottom of the Facilities tab is used to enter contact information for parent and physician letters. This information should be entered prior to using HITRACK to generate letters.

Facility Groups

From the Facility Group list, you may create groupings of facilities. This allows State and Regional coordinators to easily manage and report on data from multiple facilities.

Nurseries & Pick Lists

The Nurseries, Nursery Groups and Pick Lists settings allow you to customize the data entry screens for your facility. Under Pick Lists you can customize the following categories: Race, Insurance Type, Languages and Custom Fields. For example, if you added "Free Healthcare" as an insurance type, this would enable users to select it from a list of insurance types when entering information. The Code field allows you to synchronize data coming from screening equipment data files.

Custom Fields allows you to setup new pick list categories and specify allowable entries for those categories as well. For example a Custom field category for "Eye Color" could be added with valid entries such as Blue, Green, and Brown. Once created this custom field could then be used later in a baby record.

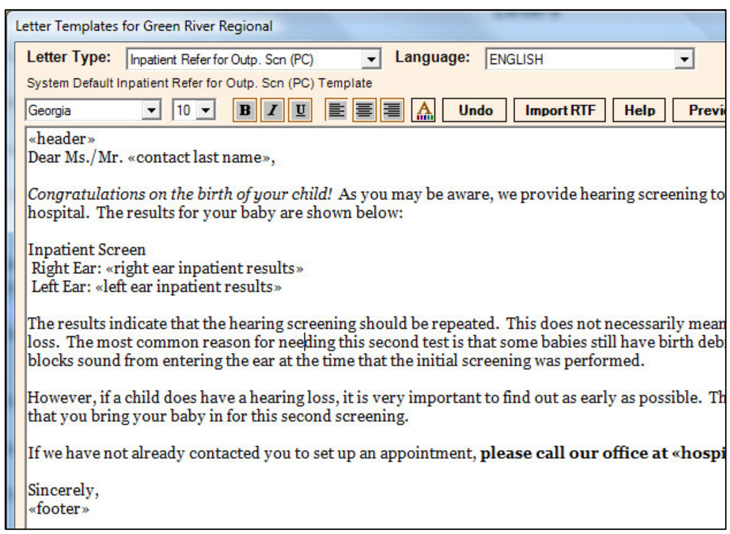
Medical People

The Medical People list allows you to add physicians, audiologists, screeners, and Early Intervention personnel for a specific facility or facility group. Each data entry screen allows for fully detailed contact information. Older non-current personnel can be suppressed from new data entry screens by using a "Show?" option checkbox. This allows you to keep your historical data intact while maintaining streamlined data entry for new records.

Letter Settings

Under the Letter Settings tab you can select which letters should be generated for the currently selected facility and define standard letter margins to fit your facility's letterhead.

Letter Templates can also be customized from this screen by clicking the Letter Templates button. After selecting the type of letter and the target language you can use the Rich Text editor to specify the text, font and placement of patient data fields in the each letter. These fields contain the variable information that can be included in a letter such as a baby's name, contact name, mailing address, screening results, and so forth. Other advanced features such as RTF Import and Preview are available from this screen.

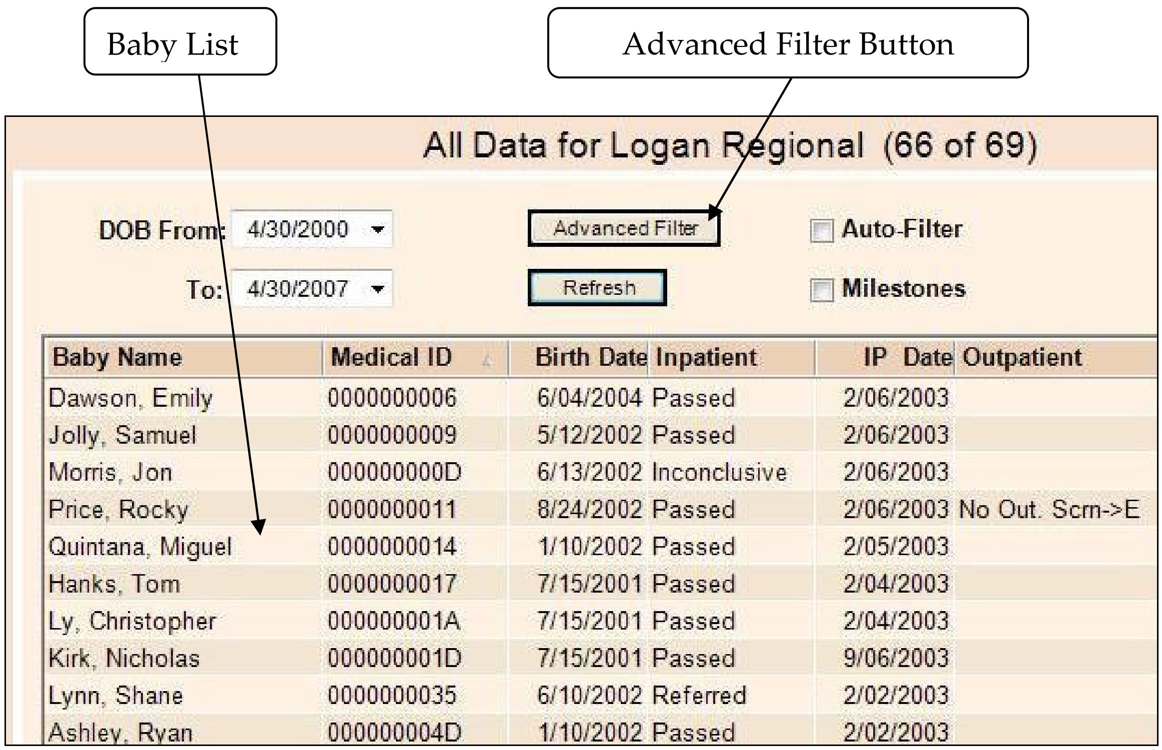


Other Settings

There are a other settings that can be changed and customized such as Required Fields, starting date defaults, birth weight entry format and advanced feature settings.

THE BABY LIST

After entering the necessary information in the setup menu, clicking on the Return to Baby List Icon at the top of the screen will display the same interface viewed immediately after logging in. The baby list is shown in the work area (middle) of the screen.



This list of babies is generated based on a specified range of birthdates and the current facility or facility group. Additional columns may be viewed using the scroll bar (not shown above) at the bottom of the list.

Sorting

The baby list may be sorted by clicking on the desired column name at the top of the list. Repeated clicks to the same column header will toggle between ascending and descending order.

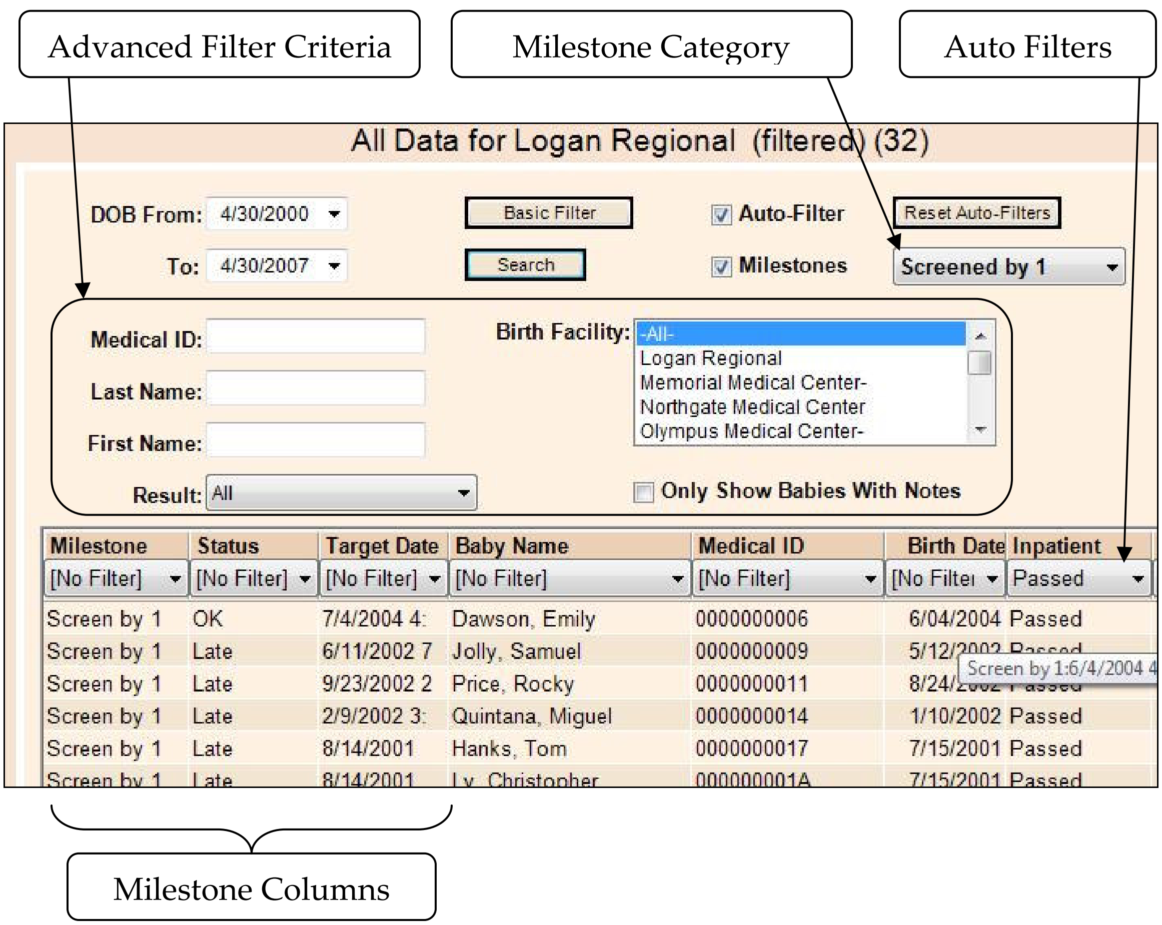
Filters

By clicking the Advanced Filter button, you can enter search criteria based upon a medical ID, last name, first name, screening result, or birth facility. To turn off the advanced filter, click the **Basic Filter button**. Auto-Filter provides even more flexibility for arranging your data in the Baby List by allowing column specific filtering.

Milestones

The Milestone feature enables users to easily identify infants who are nearing or who have missed the CDC recommended dates for hearing screening (before 1 month), loss identification (before 3 months), and intervention (before 6 months).

When the Milestone feature is turned on, three new columns appear on the baby list – Milestone, Status, and Target Date. In addition, a drop-down box appears directly to the right of the Milestones checkbox. The drop-down box allows you to select which milestone category to display. After selecting the milestone category, click the Search button to view the results in the baby list.



THE FILE CABINET

To the left of the baby list is the file cabinet.

The button in the upper right corner of the cabinet will minimize the file cabinet giving the user a larger work area. To restore the file cabinet once hidden, click on the file cabinet icon at the top of the screen.

Action Needed - Top Drawer

The folders within this drawer represent actions the baby may need based on screening outcomes and provide powerful "To Do List" filtering. HITRACK's Procol Engine automatically categorizes babies according to the actions they might need based on the protocol setting for the selected facility.

The **Two-Stage Automated Pass/Manual Non-Pass** protocol includes the following folders under **Action Needed:**

Inpatient Screen:
- Need Screening -- Babies yet to be screened
- Incomplete -- Babies in process of being screening waiting to be finished

Outpatient Screen:
- Need Appointment -- Babies who have finished Inpaitent screening without passing
- Need Screening -- Babies with appointments for Outpatient Screening

Evaluation:
- Need Appointment-- Babies needing appointments for diagnostic or other evaluation
- Need Evaluation -- Babies with appointments for evaluation

Risk Monitoring -- Babies who've passed screening but are being monitored for Risks

Need to Locate -- Babies with invalid contact information who need follow-up

No Action -- Bottom Drawer

After screening, most babies will need no further action. Infants who do not need further action are categorized into the following folders:

- Complete:
  - Passed Screening
  - Completed Evaluation
- Transferred Out
- Refused
- Lost
- Deceased

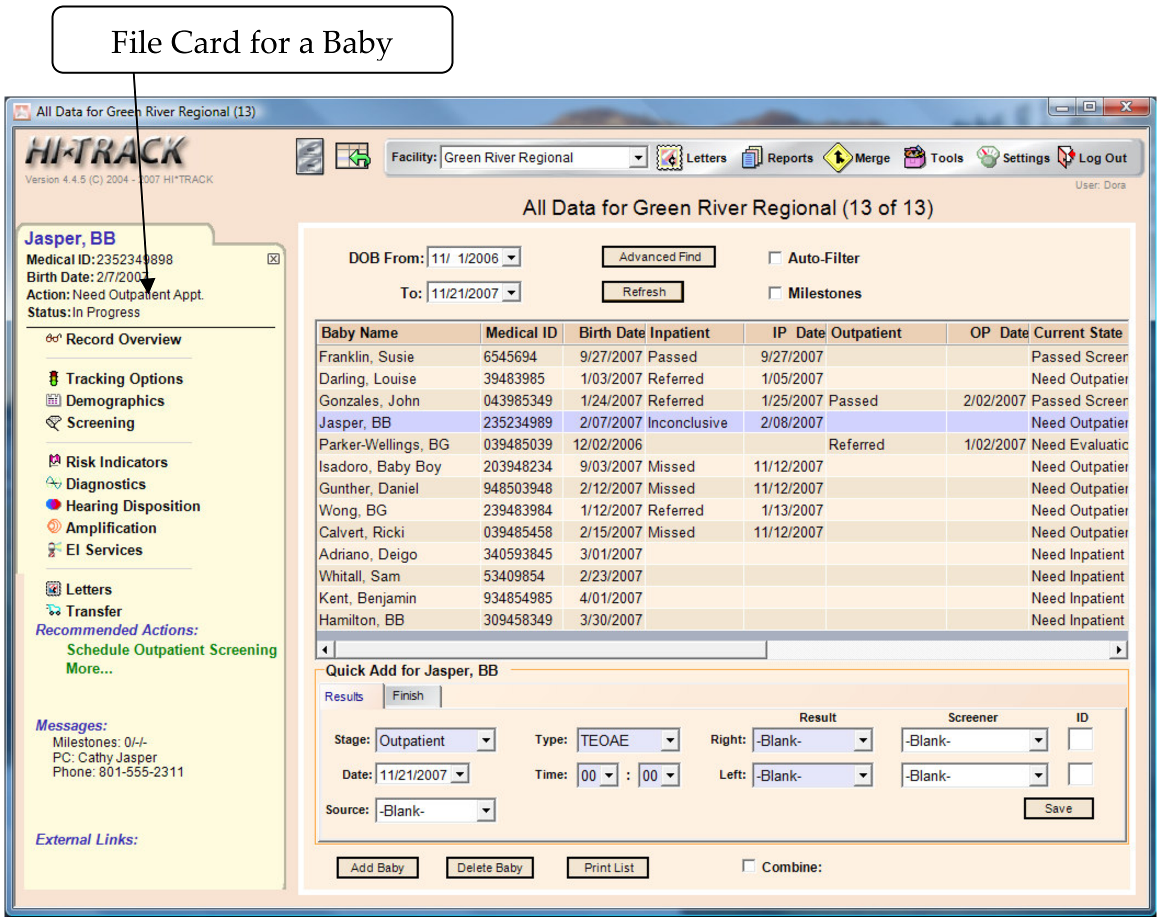
The File Cabinet is dynamically streamlined based on the Protocol selected for your facility. Other protocols, such as the **Two-Stage Automated**, omit the "Incomplete Inpatient" folder because this protocol anticipates completed screening data for babies merged from third-party screening equipment software. This allows HITRACK to give you the most efficient data management support and keeps your data in convenient "To Do" lists.

All Folders

The All Folders link at the top of the File Cabinet gives you ready access to a complete, unfiltered view of the Baby List.

THE FILE CARD

After single clicking on a baby from the baby list, a file card replaces the file cabinet on the left side of the screen as shown below.



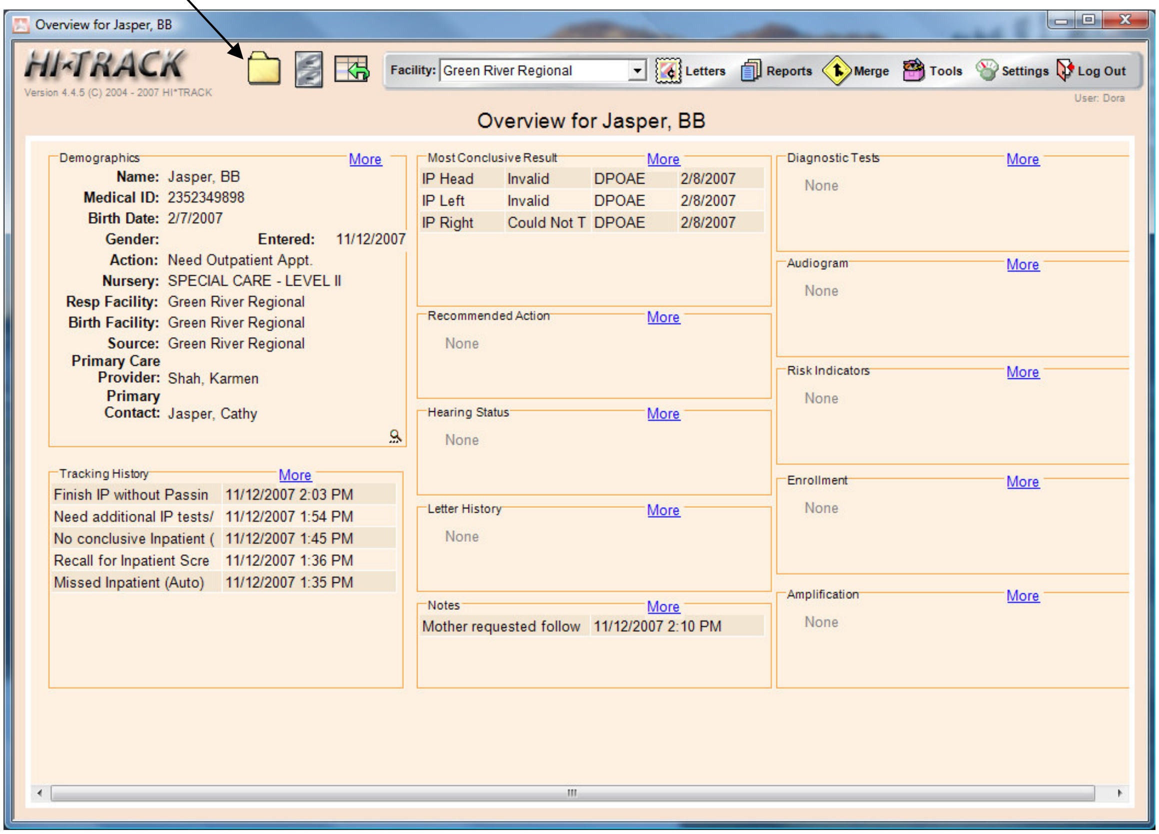
The file card provides access to information specific to the selected baby. Relevant key information, such as contact information, risk indicator alert and pending letters notification also appear on the file card providing you with on demand assistance with your tasks.

The screen shown above also highlights the Quick Add feature. This tool allows for quick manual entry directly from the filtered baby list and can be turned off in Settings.

Record Overview

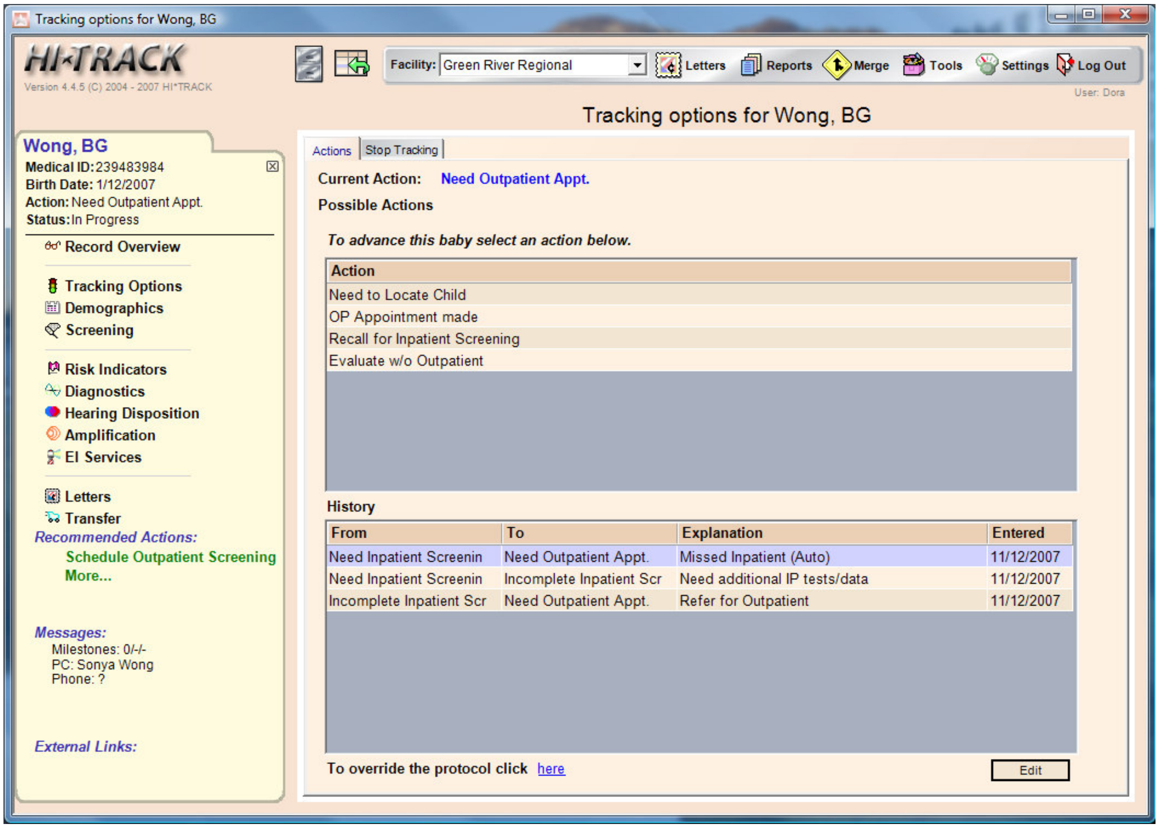
Clicking the Record Overview link will provide a summary of data for a baby and provides links to obtain more detailed information. Note that on this screen the File card has been minimized to the top to maximize screen usage.

Clicking on the yellow icon at the top will display the baby file card again.



Tracking Options

The Tracking Options link is directly below the Record Overview link on the baby file card. Clicking this link will display the following screen.



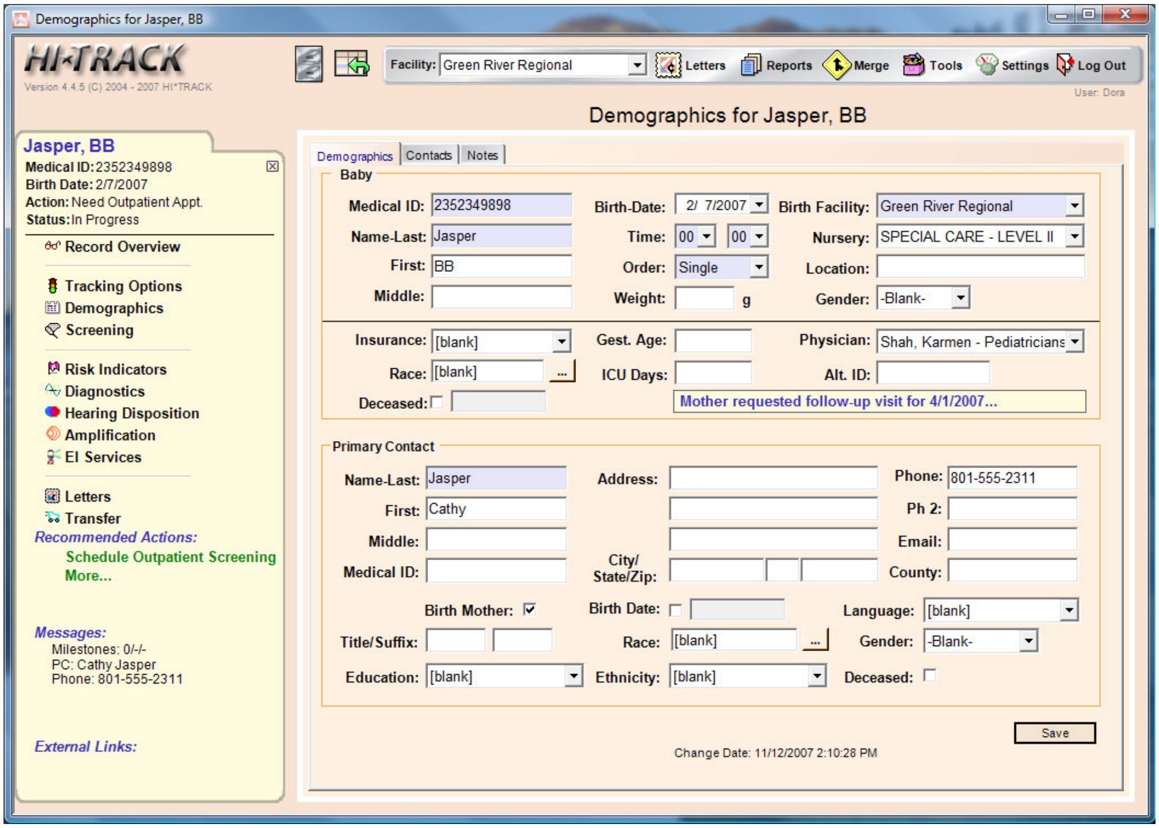
This screen will allow you to advance a baby record from one tracking action to another. The top grid gives a list of suggested actions for a baby based on the protocol being used.

The bottom grid provides a history of actions for the selected baby.

You may override the protocol at any time for special circumstances using the link at the bottom of the screen.

Demographics

The Demographics link in the baby's file card provides specific demographic data for a baby and its primary contact.



The top half of the demographics screen is dedicated to baby information. The bottom half is dedicated to primary contact information. At the top left corner of the demographics screen are three tabs – Demographics, Contacts, and Notes. The Contacts tab lets you enter more contacts for a baby. Comments and custom field entry may be added under the Notes tab.

Screening

The Screening link is where hearing screening information may be entered and reviewed for a baby. A screening history grid is shown on the page, and it is possible to override the most conclusive screening results here.

Risk Indicators

Selecting the Risk Indicators link will display a list of risk indicators for a baby. You can use the drop downs to indicate whether a baby has any of the risks shown here. A history of risk indicators may also be accessed from this screen.

Diagnostics

The Diagnostics link provides screens for entering DxABR, OAE, Tympanometry and Behavioral results. Each of these tabs will allow audiologists to enter diagnostic testing results for the selected baby. A baby's diagnostic report can also be created from this screen.

Hearing Disposition

There are two tabs on the Hearing Disposition. The first of these allows you to enter hearing disposition data and select the most conclusive outcomes. The second tab allows audiograms entry.

Amplification

The Amplification link is where information may be entered regarding a baby's hearing devices.

EI Services

With this link information about enrollment in Early Intervention services may be added.

Letters

Selecting the Letters link will display a screen divided with three tabs. The Pending Letters tab shows those letters that are waiting to be printed for the selected baby. The Letter Request tab allows you to select additional letters to print at any time. The Letter History tab shows the letters that have previously been printed for that baby and allows you to resend a previously sent letter.

There are three activities that add letters automatically to the Pending Letter list.

1. Merging (For Automated Protocols)
2. Screening Data Entry (For Automated Protocols)
3. Tracking Options (Manually "finishing" records.)

These three activities put a letter on Pending list, but do not generate the text for the body of the letter. This allows the demographics and contact information to be completed before the letters are actually processed.

When letters are manually requested by using the Request tab the text of the letter is immediately generated.

Transfer

The transfer link can be used to transfer a baby to another facility within the system. An option is also available to transfer the baby out of the system.

Recommended Actions

Clicking on the "More…" link on the File Card under Recommended Actions will show the status of all follow-up actions for a baby record. Under this section, additional recommended actions may also be entered.

Messages

Below Recommended Actions is a message section that displays helpful information about the selected baby. Hearing Disposition, Contact information and baby specific Milestone achievement are examples of helpful information provided in the Messages section.