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This is a Quick Reference for getting started with the System. For more detailed information, review the System Manual.

Network Notes...

If you are installing the Diabetes Management System onto a Network, please contact your Network Administrator **before proceeding** with installation.

Installing the System:

From a CD... Insert the Installation CD in your CD Drive and it should start automatically. If it does not, click on the START button (on your task bar) and select RUN. In the Open Dialog box, type in the CD Drive Letter that contains the installation CD followed by “SETUP” (i.e., type “D:\SETUP”). Press or click on the OK button to begin the installation. Follow the prompts.

From a Download... Navigate to the download directory and run it. Follow the prompts.

After the installation, the Diabetes Management System Programs can be found in your Program Menu, as well as a shortcut icon on your desktop.

Installing Workstation Shortcuts:

The installation program installed a workstation installation program in the main program folder called WRKINST.EXE. This installation program automates the process of creating the necessary shortcuts on your workstation desktops. The network drive needs to be mapped prior to running this program.

Mapping Network Drives:

When you map the network drive to the workstation, do not set the DMS subdirectory so that it appears as the root directory on the workstation. This could cause a problem with the system’s built-in automatic file upgrade utilities on some networks.

Directory Structure:

The default Diabetes Management System subdirectory defaults to \DMS located off of your root subdirectory. This may be different on your system, particularly if it was installed onto a network.

The system data subdirectory is called DATA and is located immediately underneath the DMS subdirectory, regardless of where it is installed.

First Time Sign On / Assign Passwords/User Levels...

The first time the application is started, you may notice a slight delay as the system files are initialized.

The Initial System Log In Last Name is: "*ADMIN*", Password is: "*ADMIN*".

... click on the Log In button to sign in. Click on FILE | USER MAINTENANCE to load your users.

The first thing to do is assign passwords and access levels to all the users. This must be completed before the users can access the system.

The System has Three Levels of Security...

- Restricted User - can view but not change any data.
- Normal User - can view/add/update data, but not change System-wide Files.
- Administrator - unlimited access. (All licensed personnel should be at this level).

Customize Your Files...

It is very important to set up your system before adding patients. These options are located under the FILE pull-down menu. Put in your staff under Staff Profile, and physicians under Physician Information.

The System File Maintenance Menu Option contains many system files that can be customized to meet your needs. Especially important is the Follow -Up Status Codes. These codes are used to identify and group patient assessment visits and are mandatory. Some institutions use initial visit, 3 months, 6 months, Medical Nutritional Therapy, etc. Rename and/or delete the follow -up codes you do not need.

In System Defaults put in the most common Insurance Companies that are dealt with in your area. They will then be used in the Patient Demographic Records.

Set up your Education Program in the System...

The Class File contains all the education information that is used in the Patient Education Records and ADA Statistics. **In the Diabetes Management System, a "Class" is defined as any educational opportunity you may have with the patient (i.e, classroom, one-on-one, demonstration, etc).** To set up the Class File, click on **EDUCATION/CLASSES | CURRICULUM | CLASS/CURRICULUM INFORMATION.** A Look-Up Window will be displayed to show the Classes loaded into the system. ALL offered Education Opportunities (both required and optional courses) should be included here (i.e. group, individual, support groups, pump or insulin starts, etc.). From this window one can add, update, or delete Classes. Click on Add, enter the Name of Education (i.e., "Initial Assessment – RN"), time, and the other fields, then Update to save this information.

Once all classes are entered, they need to be linked to all appropriate Content Areas. Click on **EDUCATION/CLASSES | CURRICULUM | CONTENT AREA/CLASS LINK MAINTENANCE.** Each Content Area statement will need to be related to the appropriate class or classes. To relate a content area statement to the appropriate class, highlight statement click on Update and use the ellipsis buttons (located to the right of the class ID# codes) to display your list of classes. Highlight the class and click on Select. Review that all classes are appropriately chosen and click on Update. To review your class list and appropriate statements, click on Education/Classes | Education Assessment | Assessment Area Listing.

Comprehensive vs Post-Educational Education:

ONLY those patients actually put into class will count in ADA 7th Edition statistics. The system determines who went to class during the requested time period, determines if they are Comprehensive/Initial, or Follow-Up, and then answers the population questions.

Comprehensive and/or Initial Education: Participants received an assessment that included relevant medical history, diabetes history, social history, diabetes knowledge, self-management skills and diabetes related behaviors in relation to the content areas of the National Standards, instruction in the areas assessed as needs, on-going assessment of knowledge and skill level and behavioral objectives. One outcome measure was tracked pre and post instruction. In the Diabetes Management System there are three ways the system determines who is Comprehensive/Initial:

1. Any participant who has attended an educational opportunity during the 3 month Data Period and…

2. Demographic File: The box, Completed this (or other) DSME Program is NOT checked.

3. Demographic File: Under General Tab, Date Finished Program is blank.

Post-Educational Education: Participant has received initial or comprehensive education previously and was seen for some sort of follow-up education.

In the Diabetes Management System there are three ways the system determines who is considered Follow-Up Education:

1. Any participant who has attended an educational opportunity during the 3 month Data Period period and

2. Demographic record has the box; Completed this (or other) DSME program CHECKED.

3. Or the Date Finished Program in Demographics indicates the person finished this program at a time period PRIOR TO the requested Data Period.

Patient Demographics...

To add a new patient record, click on the PATIENTS button on the tool bar. All the patients in the in the system are displayed here. Click on the ADD button to add a new patient record. Each record has several pages that can be accessed by clicking on the appropriate tab at the top of the form.

The mandatory fields for each record are color-coded bold blue:

Last and First Name Referring Physician Number

For ADA Recognition:

Age, Type of Diabetes, Race, and Barriers to learning are required (color-coded bold green).

Patient Assessments...

Data Records based on visit date. Patients can have multiple Assessment Records. Assessment Records contain specific patient visit and lab value data you track for outcomes. Most Outcomes Report data comes from their Assessment Records. Highlight the appropriate patient in the Look Up Window, and click on the Pathway then ASSESSMENT.

Add will add a new assessment, Update will bring up an existing assessment's detail. Each Assessment Record can track Medications, Eye & Foot Problems, Management Issues, Lab Work, and other Visit Information.

These windows operate in the same way as the Patient Data Windows above.

A Prime New Assessment With Prior Data field may be displayed at the top of this window. If it is checked, a new Assessment visit will be primed with data from the last most recent visit. Some sites require this, but most do not. *Harbor Software recommends that you DO NOT use this feature without contacting us first.*

What Outcomes do you wish to track?

The Diabetes Management System can track over 70 different Outcome Measures. The majority of outcomes can be recorded in the assessment module.

Patient Education Record...

There are three ways to add patient education records...

1. Individual Education Record.
2. Group Class Attendance, Unscheduled.
3. Scheduled Class Attendance.

In this Quick Start Guide, only the Individual Education Record will be discussed (refer to the System Manual or call Harbor for more information).

Individual Education Record...

Enter your patient into any of the educational sessions they attended, whether it is a class, one on one, insulin start, etc. Go into a Patient's Pathway and click on Individual Education Record. This patient's entire education record is displayed here. Click the add button to add a new education record.

Finding Reports...

The Diabetes Management System has over 270 reports, many of which can be filtered in a number of ways. The System Report Locator can easily assist you in finding the report you want and where to find it. At the Main System Menu, click on REPORTS, then REPORT LOCATOR. There are tabs which list the reports alphabetically and by report grouping. Double click on the report to view the Report Location at the bottom of the window.

Where to Go From Here?

Please call Harbor Software to set up an appointment for a telephone Orientation. We will be happy to walk you and your staff through the System modules.