

# HealthFile Quick Start Documentation

## **Introduction:**

HealthFile allows for comprehensive tracking of personal health information and history for personal use or physician use from any Pocket PC or Windows Mobile handheld and Windows PC. This document provides information on the handheld software, as the PC software has its own complete help file system. You may want to print this document for easier reference.

## **Installation:**

To install the software, download the setup file (usually HealthFileWM\_Setup.exe) to your PC. Then, double click the .exe setup file to start the PC installer. The installer will install the PC software first. When the software is first run after installing, the handheld software will be installed.

## **Registration:**

The software is initially installed as a trial version. After purchasing, a 5-digit registration code is provided. This 5-digit code is entered in the blank area on the startup screen on the handheld or on the PC software from the Help / Register menu. Once the registration code is entered on either the handheld or PC, the registration code will be transferred to the other version when synced. The registration code unlocks the full version features. No additional installation is required.

## **Getting Started:**

The following screens and descriptions explain many of the features in HealthFile. The software was designed to be easy and intuitive, so it will be easy to get started. This documentation will help explain some of the advanced features.

To start the software on the handheld, go to the Start menu. If HealthFile is not there, go to Programs. Tap or select the HealthFile icon to launch the program. Note that this document may specify a tap, which only applies to touch screen devices. Smartphone users can navigate and select with the hardware buttons.

The screenshots below were taken from a Palm OS device, but they will be almost identical on your Windows Mobile device.

## Main List Screen:

**HealthFile**  
Saved Personal Profiles:  
Smith, Joe

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

New      Prefs Find: .....

Upon startup, the list of saved profiles is displayed. Simply tap any record in the list to view the profile

Tap the New button at the bottom of the screen to create a new profile. A profile can be created for every member of a family, including each child.

Also, the Find Area can be used to jump to a certain profile by entering the first few letters in the name.

Tap the Prefs buttons to view the Preferences screen.

## Profile Topics Screen:

**Joe Smith**

Personal	Medications
Legal	Vaccinations
Insurance	Tests
Contacts	Blood Pressure
Allergies	Weight
Illnesses, etc.	Glucose
Surgeries, etc.	Cholesterol
Appointments	Family History

Back      Delete

The profile topics screen a list of buttons for each information topic. Simply tap a topic to view or enter information for that topic.

To delete the current personal profile, tap the Delete button.

To go back to the list of profiles, top the Back button.

## Topic Screens:

**Personal**

First: My      Last: Name  
Birthdate: ▼      Age:      Gender: ▼ M      Blood Type: ▼ B-  
SSN: .....  
Home Ph: .....  
Address: ..... ▶

Typical Personal Values:  
Pulse: .....      BP: .....  
Height: .....      Weight: .....  
Cholesterol: .....

Save      Cancel

There are many topic screens allowing for a great amount of information to be stored for each profile.

Personal: store basic personal information including birthday, address, normal health values.

**Legal**

Name: My Name  
Marital Status: ▼  
Organ Donor: ▼  
Will: ..... ▶  
Living Will: ..... ▶  
Power of Attorney: ▼ ..... ▶  
Next of Kin: ▼ ..... ▶  
Resuscitation Status: ..... ▶  
Notes: ..... ▶

Save      Cancel

Legal: store organ donor status, will information, and other legal type items.

**Insurance**

Company: ▼ .....  
 Type: ▼ .....  
 Group #: .....  
 Policy #: .....  
 Date: ▼ .....  
 Phone: .....  
 FAX: .....  
 Address: ▾  
 .....  
 Notes: ▾

Insurance: store information on all types of insurance; saves records to a master list for use in other profiles.

Multiple entries can be saved per profile. A list screen is available for easy viewing and finding of a certain entry in the list.

**Contacts**

▼First: ..... Last: .....  
 Home Ph: .....  
 Work Ph: .....  
 Mobile Ph: .....  
 Address: ▾  
 .....  
 Notes: ▾  
 .....

Contacts: store emergency contact information; saves records to a master list for use in other profiles.

Multiple entries can be saved per profile. A list screen is available for easy viewing and finding of a certain entry in the list.

**Allergies**

Allergy: .....  
 Reaction: ▾  
 .....  
 Start Date: ▼ .....  
 Notes: ▾  
 .....

Allergies: store information on any allergies for the personal profile.

Multiple entries can be saved per profile. A list screen is available for easy viewing and finding of a certain entry in the list.

**Illnesses, etc.**

Illness/Condition: ▾  
 .....  
 Symptoms: ▾  
 .....  
 Onset Date: ▼ .....  
 Cured Date: ▼ .....  
 Diagnosis: ..... ▾  
 Treatment: ..... ▾  
 Physician: ▼ .....  
 Location: ▼ .....  
 Notes: ..... ▾

Illnesses, etc: store information on previous illness, diseases, or conditions including symptoms, diagnosis, treatment, etc.

Multiple entries can be saved per profile. A list screen is available for easy viewing and finding of a certain entry in the list.

**Surgeries, etc.**

Surgery/Hospitalization: ▾  
 .....  
 Date: ▼ ..... Amt: \$ .....  
 Physician: ▼ .....  
 Location: ▼ .....  
 Instructions: ▾  
 .....  
 Notes: ..... ▾

Surgeries, etc: store information on previous surgeries or hospitalizations including date, instructions, etc.

Multiple entries can be saved per profile. A list screen is available for easy viewing and finding of a certain entry in the list.

**Appointments**

Physician: ▼  
 Date: ▼ Time: ▼  
 Location: ▼  
 Reason: .....▶  
 Diagnosis: .....▶  
 Treatment: .....▶  
 Notes: .....▶  
 Follow-Up Visit:  
 Date: ▼ Time: ▼

Appointments: store information on any appointment, including date, time, reason, diagnosis, follow-up date, etc.

Multiple entries can be saved per profile. A list screen is available for easy viewing and finding of a certain entry in the list.

**Medications**

Medication: .....  
 Take: .....  
 Dosage: .....  
 Physician: ▼  
 Start Date: ▼  
 Stop Date: ▼  
 Purpose: .....▶  
 Pharmacy: ▼  
 Rx #: .....  
 Active: ▼ Yes  
 Notes: .....▶

Medications: store information on medications or vitamins being taken, or previously taken, and prescription details.

Multiple entries can be saved per profile. A list screen is available for easy viewing and finding of a certain entry in the list.

**Vaccinations**

Name: My Name  
 02/23/2004 DTaP  
 02/17/2004 HepB  
 02/17/2004 Hib  
 .....  
 .....  
 .....

Vaccinations: store information on shots and vaccinations, including date, physician, etc. In this example, the details screen is not shown.

Multiple entries can be saved per profile. A list screen shown to the left is available for most topics. This allows for easy viewing and finding of a certain entry in the list.

**Tests**

Test: .....  
 Date: ▼ Amt: \$ .....  
 Physician: ▼  
 Location: ▼  
 Result: .....▶  
 .....  
 Goal: .....▶  
 .....  
 Notes: .....▶

Tests: store information on any kind of test or exam, including result, goal, physician, location, etc.

Multiple entries can be saved per profile. A list screen is available for easy viewing and finding of a certain entry in the list.

**Blood Pressure**

Name: My Name  
 02/23 02:48P 130/70 (P 64)  
 02/17 08:41P 120/70 (P 65)  
 02/11 04:41P 135/80 (P 70)  
 .....  
 .....  
 .....

Blood Pressure: store blood pressure test results, including pulse, date, time, activity, etc. In this example, the details screen is not shown.

Multiple entries can be saved per profile. A list screen shown to the left is available for most topics. This allows for easy viewing and finding of a certain entry in the list.

**Weight**

Weight: .....  
Date: ▼02/23/2004 Time: ▼2:50 PM  
Notes: ..... ▶

Save Cancel

**Glucose**

Glucose: ▼ mg/dL  
Carbs(g): .....  
Insulin: .....  
Event: ▼  
Date: ▼08/11/2005 Time: ▼10:03 AM  
Notes: ..... ▶

Save Cancel

**Cholesterol**

Total: .....  
LDL: .....  
HDL: .....  
Triglycerides: .....  
Date: ▼08/11/2005 Time: ▼10:02 AM  
Notes: ..... ▶

Save Cancel

**Family History**

First: ..... Last: .....  
Relation: ▼  
Side: ▼  
Birthdate: ▼  
Deceased: ▼  
Illnesses/Diseases/Conditions: ▶  
.....  
Notes: ..... ▶

Save Cancel

**Preferences Screen:**

**Preferences**

Currency Symbol: \$  
Date Format: ▼mmddyyyy Sep: ▼/  
Glucose Units: ▼mg/dL  
 Backup Databases on Hotsync  
 Confirm Delete Operations

Set/Change Password

Save Cancel

Weight: store weight measurements, including date, time, and notes.

Multiple entries can be saved per profile. A list screen is available for easy viewing and finding of a certain entry in the list.

Glucose: store blood sugar test results, including carbs, insulin amount, date, time, event, etc.

Multiple entries can be saved per profile. A list screen is available for easy viewing and finding of a certain entry in the list.

Cholesterol: store total, LDL, HDL, triglycerides, date, time, note, etc.

Multiple entries can be saved per profile. A list screen is available for easy viewing and finding of a certain entry in the list.

Family History: store family history information to record illnesses and conditions of related family members.

Multiple entries can be saved per profile. A list screen is available for easy viewing and finding of a certain entry in the list.

The Preferences screen allows the user to customize several items.

The currency symbol can be specific, as well as the date format and date separator (mm/dd/yyyy, etc.). The default glucose units can also be selected. Options can be turned on or off for backing up the Palm OS databases and confirming delete operations.

Tapping the Set/Change Password button allows the password to be changed.

## Setting or Changing the Password:

**Change Password**

New Password: .....

Retype Password: .....

7 8 9

4 5 6

1 2 3

0 abc Bksp

OK  Hide Input Cancel

For additional security, a password can be used. To set or change the password, tap the Password button on the Preferences screen.

Enter the old password if one exists, then enter the new password and retyped password. The abc button will bring up the on screen keyboard for easier text entry (Palm OS only). The Bksp button will backspace one character.

HealthFile data is not encrypted, but the password does prevent unauthorized users from viewing your information.

## Menu Options:

A menu system is available to perform additional functions on the handheld. The menu bar is at the bottom of the screen.

### File Menu:

The File menu offers the following options:

**Export Date to Memo/Note** - while viewing information details, select this option to export the information as text to a new note.



### Edit Menu:

The Edit menu offers the following options:

**Edit Contact List** - allows the user to edit the Master Contact List that can be used for any personal profile.

**Edit Insurance List** - allows the user to edit the Master Insurance List that can be used for any personal profile.

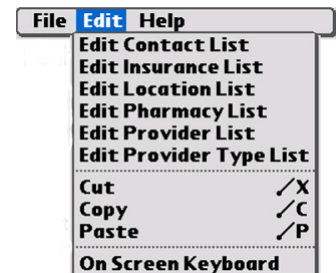
**Edit Location List** - allows the user to edit the Master Location List that can be used for specifying locations in different topics.

**Edit Pharmacy List** - allows the user to edit the Master Pharmacy List that can be used for selecting pharmacies in Medications.

**Edit Provider List** - allows the user to edit the Master Provider List of providers (physicians, etc.) that can be used to select a Provider in different topics.

**Edit Provider Type List** - allows the user to edit the Master Provider Type List that can be used for specifying a provider type in the Master Provider List.

**Cut/Copy/Paste** - standard functions.



### Help Menu:

The Help menu offers the following options:

**Help** - selecting this option will display the help file available on the handheld.

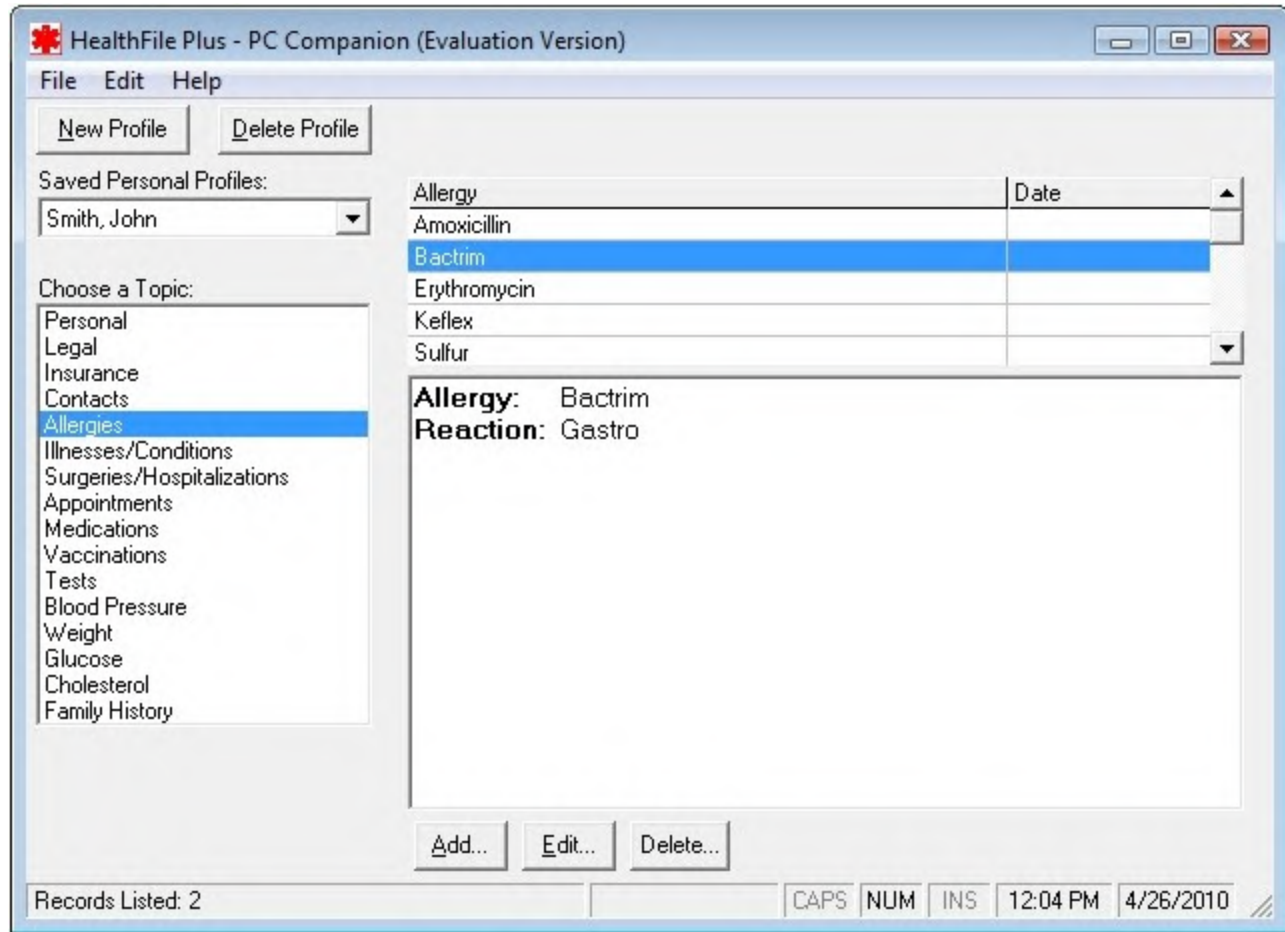
**About** - selecting this option will display the About screen, including the version number.

**Close** - fully closes the application on the handheld so that synchronization will work properly



## HealthFile Desktop:

The PC software includes all of the features on the handheld software, plus other features specific to the desktop software. Features available only on the desktop software include: printing selected records, printing all records, importing records from delimited text files (CSV, etc.), exporting records to a CSV file, and more. Consult the help file on the PC desktop software for further information on the desktop features.



## Conclusion:

If you are just evaluating or have already purchased HealthFile - Thanks!

If you have questions about the software, or cannot find an answer to a problem at our site, please email our support staff. We will work hard to resolve your issue and answer your questions.

