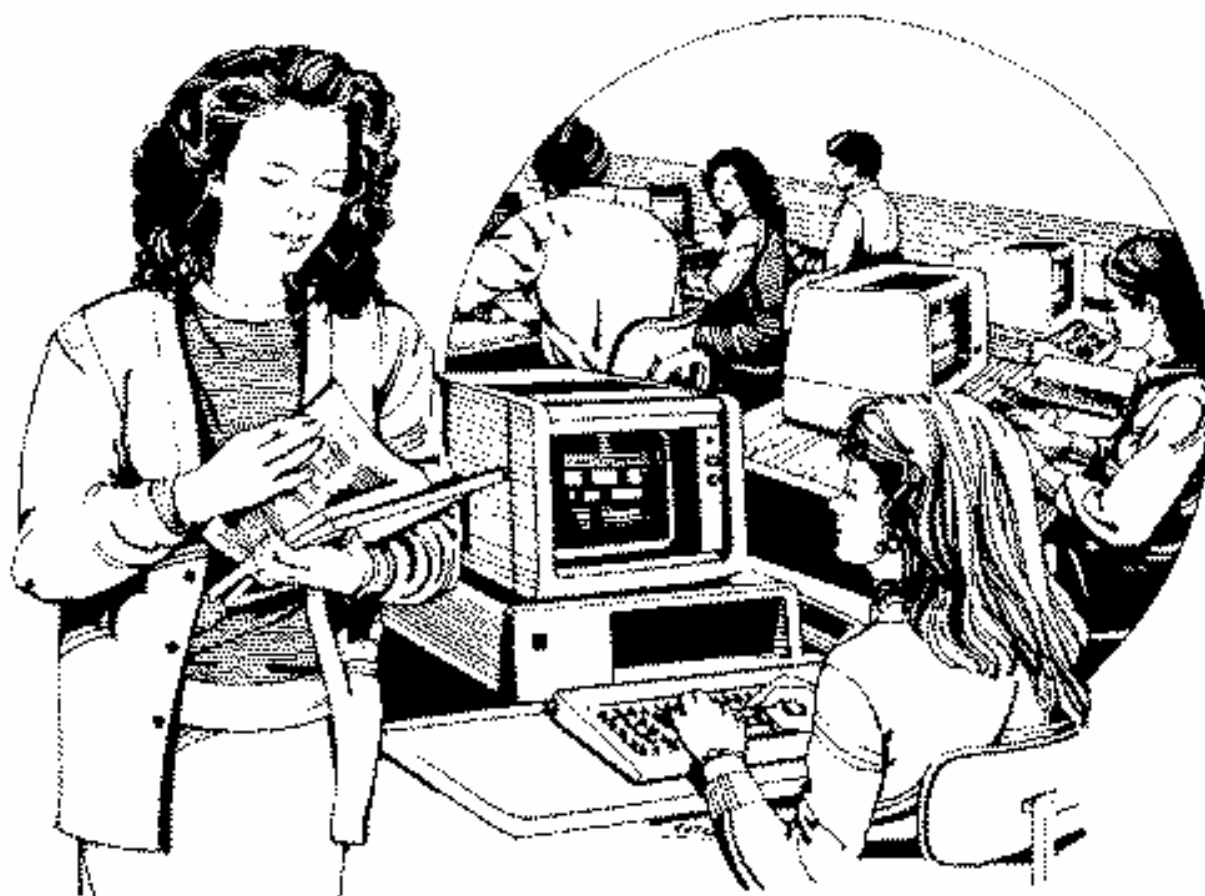


# Nurse's Daily Work Sheets



**User's Manual**

# **Daily Work Sheets**

Health District Information System  
HDIS (Windows Ver. 4.0 )

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**CHC** Software, Inc.  
Health District Information Systems  
[helpdesk@hdis.org](mailto:helpdesk@hdis.org)

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# Introduction

This program is designed to assist you in organizing a systematic approach to entering your nurse's daily work sheets and provides accurate up-to-date records within your health district.

Please review the manual carefully to obtain the maximum benefits. Little or no prior computer experience is necessary to operate this program.

## About This Manual

***The Nurse's Daily Work Sheets Module*** is simple to use. ***The maximum benefit with the least time spent will be obtained if you start at the first page of this manual and follow the directions exactly as you enter the first record in your computer.***

Square boxes in this manual surround the key that you are to press on your keyboard. As an example, when you read

ENTER

, press the **enter** key on your keyboard.

The word

**TYPE** is followed by bracketed [ ] instructions of what to type into a field.

Note: For Technical Support, email: [helpdesk@hdis.org](mailto:helpdesk@hdis.org)



# Navigation

Whenever you see one  click the left side of your mouse once.

Whenever you see two  click the left side of your mouse twice.

## Navigation Keys For Entering Information

**Tab** or **ENTER** to move to next field

**Shift** **Tab** or **Up** to go back one field

**Alt** + **R** places you in the receipt screen.

## Editing Keys

**Backspace** deletes one character left of cursor

**Delete** deletes one character

**Insert** inserting & overwriting modes

When you see a pull-down field, click the arrow to the right to view all your choices.



## Starting HDIS

### MICROSOFT Windows Users

Start

Programs

Health District Info Systems

HDIS

# Health District Information System Menu Bar

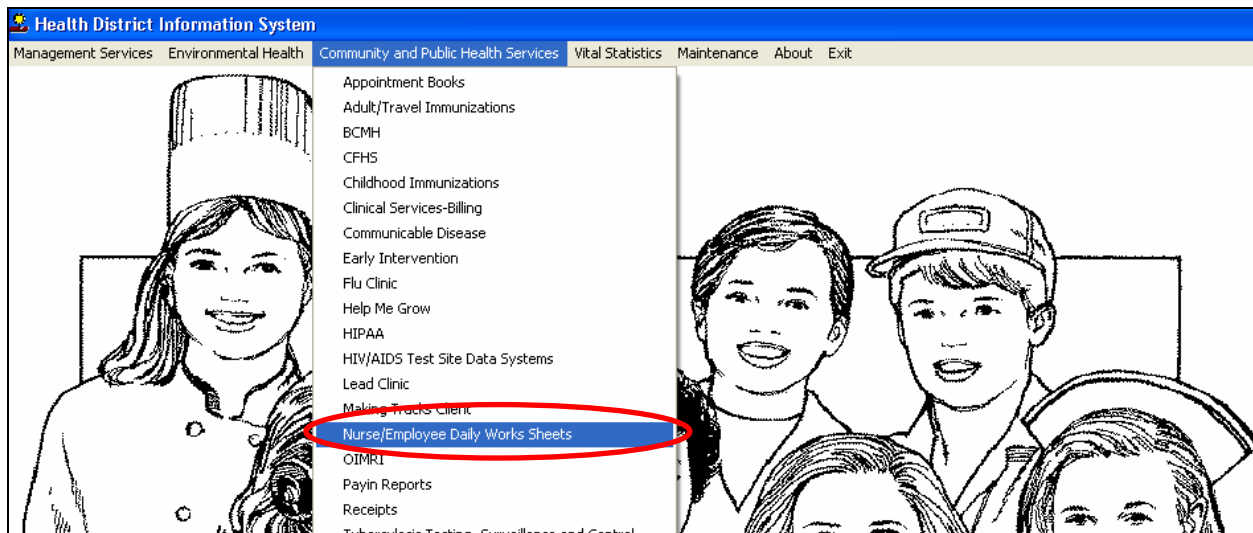
**HDIS (Health District Information System)** has several different modules designed to assist your health district in its day-to-day operations. The **Nurse's Daily Work Sheets module** is a great addition to these modules and simplifies your record keeping, billing and information management needs.



**Community and Public Health Services**



**Nurse's Daily Work Sheets**



**Daily Work Sheets**



# Entering an Activity

Nurse	Date	Entry	Prgm	Act	Time	Vehicle	From Odom
994	03/13/2003	5	5155	4230	60		
994	03/13/2003	6	5707	4230	90		
994	03/13/2003	7	5701	4230	30		
994	03/13/2003	8	5999	4261	60		
994	03/14/2003	1	5141	4299	90		
994	03/14/2003	2	5141	4230	90		
994	03/14/2003	3	5707	4271	45		

The “**View/Select**” window is for viewing a nurse/employee’s worksheets. To add a daily work sheet, choose the **Month**, **Year**, **Nurse/Employee Code & Name**, and choose the **Day** from the tab bar that lies on top of the grid.

In this case we are entering a daily worksheet for **Bridgett Doe** on **September 28, 2006**. When you are ready to start making entries for the day, click the “**Add**” tab.

You may now begin to enter information into the fields for your entry. In this particular example we are entering the 1<sup>st</sup> entry on **September 28, 2006**. When complete making one entry, click **"Add"** to begin the next.

Field/Button	Description
Date	Date of work sheet.
Entry	Entry number from work sheet.
Ps	Choose the political subdivision from the dropdown list.
Program	Indicate the program.
Activity	Indicate the activity performed.
# Seen	Enter the number of clients seen.
Time	Enter the time of your entry in minutes.
Total Office Time	The program will fill this field out automatically.
Total Field Time	The program will fill this field out automatically.
Total	The program will fill this field out automatically.
Vehicle #	Enter the vehicle number if you used a county/city vehicle.
Mileage	Enter your mileage if applicable.
ID #	Enter the ID number of the client.
Name/Location	Enter the location name of the entry.
Address	Enter the address of the activity.
Notes	Enter your own notes on the entry.
Add	Click to move on to the next entry for the day.



Daily Work Sheet for DOE, BRIDGETT

View/Select | Modify | Add

Date: 09/28/2006 | Entry: 2 | Ps: [dropdown] | City: [text box]

Prgm: [dropdown] | Description: [text box] | Activity: [dropdown] | Description: [text box] | # Seen: 0

Time: [text box] | Total office time: 60.0 | Total field time: 0 | Total: 60.0 | Vehicle #: [text box] | Mileage: [text box]

ID #: [text box] | Name: [text box]

Name/Location: [text box] | Address: [text box]

Notes: [text area]

Add

After the “**Add**” button was clicked, the program automatically moved on to the next entry (2) for the day. Continue filling out your entries until you have completed your days’ work.

# Modifying an Entry



## Modify

Daily Work Sheet for DOE, BRIDGETT

View/Select      Modify      Add

Date: 09/28/2006    Entry: 1    Ps: 97    City: CUYAHOGA

Prgm: 100    Description: CHILD HEALTH    Activity: 200    Description: CLINICS    # Seen: 0

Time: 60    Total office time: 60    Total field time: 0    Total: 60    Vehicle #:    Mileage: 0.0

ID #:    Name:    Name:    Address:

Notes:

Nurse/Employee Code & Name: BD    DOE, BRIDGETT

Previous    Next    Delete    **Modify**

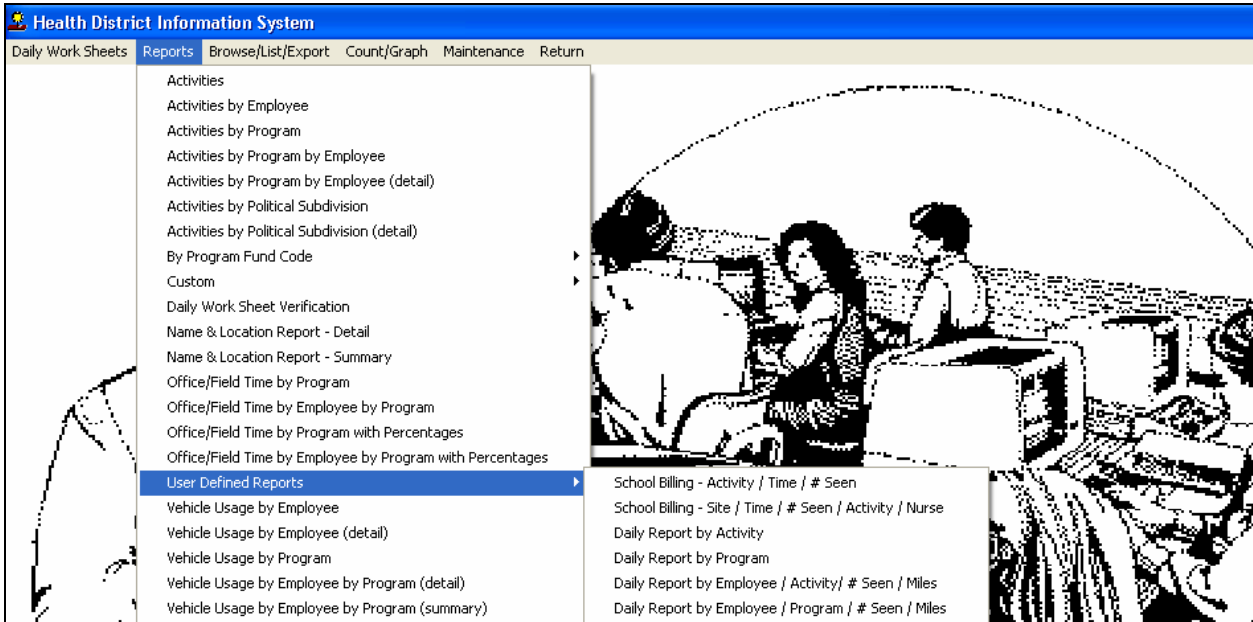
To modify a work sheet choose the day of the work sheet on the “**View/Select**” tab and click on the “**Modify**” tab. The entry that is selected will appear as “Read Only” (gray). To modify the entry click the “**Modify**” button. The “**Next**” and “**Previous**” buttons will navigate to your next or previous entries for the work sheet. To delete an entry, click the “**Delete**” button.



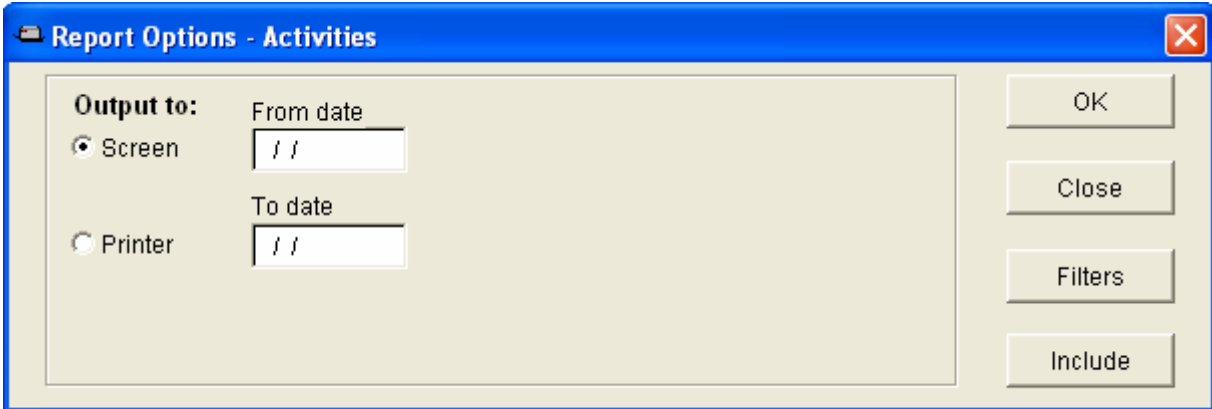
# Reports



## Reports



The **Daily Work Sheets** program has a set of pre-defined reports to choose from. Each reported will ask for **From date issued** and **To date issued** in order for you to perform your reporting needs under different time frames.



You may also preview the report before printing. Also, you have the ability to use filters to build a query.

## Reports

<b>Report</b>	<b>Description</b>
Activities	Generates a count report for all the activities performed based on the time frame you indicate in the "From" and "To" date fields. The activities will be broken down between "Office" and "Field" and will also include a "total" along with a percentage.
Activities by Employee	Generates a count report for all the activities performed based on the time frame you indicate in the "From" and "To" date fields for each employee. The activities will be broken down between "Office" and "Field" and will also include a "total" along with a percentage.
Activities by Program	Generates a count report for all the activities performed for each program based on the time frame you indicate in the "From" and "To" date fields. The report will also generate a "total time" for and "average time" for each activity.
Activities by Program by Employees	Generates a count report for all the activities performed for each program, by each employee based on the time frame you indicate in the "From" and "To" date fields. The report will also generate a "total time" and "average time" for each activity.
Activities by Program by Employees (detail)	Generates a count report for all the activities performed for each program, by each employee based on the time frame you indicate in the "From" and "To" date fields. The report will also generate a "total time", "average time", and "date" for each activity.
Activities by Political Subdivision	Generates a count report for activities by each political subdivision based on the time frame you indicate in the "From" and "To" date fields.
Activities by Political Subdivision (detail)	Generates a count report of activities by political subdivision based on the time frame you indicate in the "From" and "To" date fields. The report also includes average time and mileage.
By Program Fund Code – Office/Field Time with Percentages	Generates a fund code count report with office versus field time with percentages based on the time frame you indicate in the "From" and "To" date fields.
By Program Fund Code - Office/Field Time by Employee with Percentages	Generates a fund code count report with office versus field time by employee with percentages based on the time frame you indicate in the "From" and "To" date fields.
By Program Fund Code - Office/Field Time by Employee by Date	Generates a fund code count report with office versus field time by employee by date based on the time frame you indicate in the "From" and "To" date fields.
By Program Fund Code - Vehicle Usage by Fund	Generates a vehicle usage report by fund code based on the time frame you indicate in the "From" and "To" date fields.
Daily Work Sheet Verification	

Name and Location Reports – Detail	Generates a name and location report along with a program description based on the time frame you indicate in the “From” and “To” date fields.
Name and Location Reports – Summary	Generates a name and location report along with a program description by employee based on the time frame you indicate in the “From” and “To” date fields.
Office/Field Time by Program	Generates an office versus field time report for all programs based on the time frame you indicate in the “From” and “To” date fields.
Office/Field Time by Employee by Program	Generates an office versus field time spent for each employee based on the time frame you indicate in the “From” and “To” date fields.
Office/Field Time by Program with Percentages	Generates an office versus field time report for all programs by with percentages based on the time frame you indicate in the “From” and “To” date fields.
Office/Field Time by Employee with Percentages	Generates an office versus field time spent for each employee with percentages based on the time frame you indicate in the “From” and “To” date fields.
Vehicle Usage by Employee	Generates vehicle usage report by each employee for each based on the time frame you indicate in the “From” and “To” date fields.
Vehicle Usage by Employee (detail)	Generates a vehicle usage report by each employee based on the time frame you indicate in the “From” and “To” date fields. The report also includes a “location name and address” along with a “Traveler’s Certificate” for the inspector to sign.
Vehicle Usage by Program	Generates a vehicle usage report for each program based on the time frame you indicate in the “From” and “To” date fields.
Vehicle Usage by Employee by Program (summary)	Generates a vehicle usage report by employee, by program based on the time frame you indicate in the “From” and “To” date fields.
Vehicle Usage by Employee by Program (detail)	Generates a vehicle usage report by employee, by program based on the time frame you indicate in the “From” and “To” date fields. The report also includes a “location name and address” along with a “Traveler’s Certificate” for the employee to sign.
Vehicle Usage by Employee by Program (summary)	Generates a vehicle usage report for each vehicle based on the time frame you indicate in the “From” and “To” date fields.

# Using the Include Button

Checked boxes indicate that the code is included in your report !

IN	Code	Program
<input checked="" type="checkbox"/>	100	CHILD HEALTH
<input checked="" type="checkbox"/>	101	BCMH
<input checked="" type="checkbox"/>	102	EARLY INTERVENTION
<input checked="" type="checkbox"/>	103	PKU/GENETICS
<input checked="" type="checkbox"/>	104	IMMUNIZATIONS, CHILD
<input checked="" type="checkbox"/>	105	IAP GRANT
<input checked="" type="checkbox"/>	106	WELCOME HOME
<input checked="" type="checkbox"/>	107	HEARING SPEC. POD
<input checked="" type="checkbox"/>	108	EMPLOYEE HEALTH
<input checked="" type="checkbox"/>	109	COMMUNICABLE DISEASE
<input checked="" type="checkbox"/>	110	FLU
<input checked="" type="checkbox"/>	111	SUPERVISORY
<input checked="" type="checkbox"/>	112	HIV/AIDS
<input checked="" type="checkbox"/>	113	PLACEMENT PHYSICALS
<input checked="" type="checkbox"/>	114	TUBERCULOSIS
<input checked="" type="checkbox"/>	115	LEAD
<input checked="" type="checkbox"/>	116	ADULT IMMUNIZATIONS
<input checked="" type="checkbox"/>	117	HEALTH DISTRICT GENERA
<input checked="" type="checkbox"/>	118	TIME OFF
<input checked="" type="checkbox"/>	119	EARLY START

IN	Code	Activity
<input checked="" type="checkbox"/>	200	CLINICS
<input checked="" type="checkbox"/>	201	REPORTS
<input checked="" type="checkbox"/>	202	FILING/MAILINGS/ PROG SU
<input checked="" type="checkbox"/>	203	DIRECT CLIENT SERVICE
<input checked="" type="checkbox"/>	204	EDUCATION CLASS PREPA
<input checked="" type="checkbox"/>	205	ATTEMPTED VISIT
<input checked="" type="checkbox"/>	206	HOME/OFFICE VISIT
<input checked="" type="checkbox"/>	207	STAFF MEETING
<input checked="" type="checkbox"/>	208	INSERVICE TRAINING ATTE
<input checked="" type="checkbox"/>	209	SUPERVISION PERSONNEL
<input checked="" type="checkbox"/>	210	OTHER MEETING-AGENCY
<input checked="" type="checkbox"/>	211	PLANNING/DESK WORK
<input checked="" type="checkbox"/>	212	TRAVEL TIME
<input checked="" type="checkbox"/>	213	ORIENTATION
<input checked="" type="checkbox"/>	214	SICK DAY, PERSONAL DAY
<input checked="" type="checkbox"/>	215	VACATION, MISC.LEAVE
<input checked="" type="checkbox"/>	216	EDUC. CLASS, COMMUNITY
<input checked="" type="checkbox"/>	217	INSERVICE TRAINING PRES
<input checked="" type="checkbox"/>	218	TRANSLATION PROVIDED
<input checked="" type="checkbox"/>	219	HEALTH PROMOTION

Reset All Check Boxes

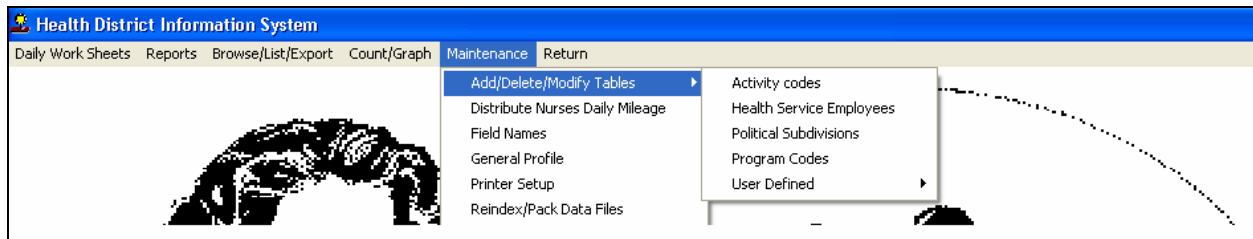
Reset All Check Boxes

The **“Include”** button on the **Report Options** menu allows you to choose which **Program** and **Activity** codes to include in each of your reports. If you wish to include the codes, place a checkmark in the **“IN”** box.

# Maintenance - Add/Delete/Modify Tables



## Maintenance



The maintenance menu contains a list of the tables that you can modify for your program.





## Activity Codes

**Add/Delete/Modify Activity Table**

Code	Activity	Time
11	OFFICE -- LETTER	O
12	OFFICE -- PHONE CALL	O
13	OFFICE -- PLAN REVIEW	O
14	OFFICE -- VISITATION	O
15	OFFICE -- OTHER	O
16	OFFICE -- ILLNESS INVESTIGATION	O
17	OFFICE -- HEALTH EDUCATION	O
18	OFFICE -- MEETING	O
19	OFFICE -- COMPLAINT	O
21	FIELD -- CONSULTATION	F
22	LICENSE/PERMIT INSPECTION*	F
23	FIELD -- SAMPLE TRANSPORT	F
24	FIELD -- OPACITY READING	F
25	FIELD -- OTHER	F
26	FIEL -- ILLNESS INVESTIGATION	F
27	FIELD -- HEALTH EDUCATION	F
28	FIELD -- MEETING	F
29	FIELD -- COMPLAINT	F

Buttons: Close, Add, Delete, Print

Field/Button	Description
Code	Enter the activity code.
Activity	Enter the activity.
Time	Enter "O" for <b>OFFICE</b> activity, or "F" for <b>FIELD</b> activity
Close	Closes the table
Add New Fee	Adds an activity to the table.
Delete Fee	Deletes the activity.
Print	Prints a list of the Activity Codes



## Health Service Employees

**Add/Delete/Modify Nurse/Employee Table**

Code	Name	District
908	ANDERSON, GAIL	
MK	ATC RN	
CM	CAROL MCKNIGHT, RN ATC	
CS	CAROL SIRL, RN ATC	
CT	CAROL TACKETT, RN	
27	CARSEY, LORETTA	
978	COLE, DAWN	
69	COX, DONNA	
973	DL COLE	
BD	DOE, BRIDGETT	
JD	DOE, JANE	
06	DURCHIK, KATHY	
9102	DURDA, LINDA	
994	DWYER, JUDY	
02	FULTON, LOIS	
61	GUNSCH, ANNMARIE	
JM	JENNIFER MURRAY, ATC	
KD	KATHY DURCHIK	
KM	KATHY MACKEY, RN	
KV	KATHY VERNON, RN ATC	
9103	KEE, MICHELLE ATC	
28	KEENER, TERRY	

Close  
Add  
Delete  
Print

Field/Button	Description
Code	Enter the employee's code.
Name	Enter employee's name (last name, first name).
District	Enter the employee's district.
Close	Closes the table
Add New Fee	Adds an employee to the table
Delete Fee	Deletes the employee.
Print	Prints a list of the employees.



## Political Subdivision

**Add/Delete/Modify Political Subdivision Table**

Code	Subdivision	District
01	WILLOWICK CITY	07
02	WICKLIFFE CITY	02
03	WILLOUGHBY HILLS CITY	02
04	WILLOUGHBY CITY	06
05	EASTLAKE CITY	07
06	PAINESVILLE CITY	03
07	MENTOR CITY WEST	04
08	KIRTLAND CITY	02
09	MENTOR ON THE LAKE CITY	05
10	WAITE HILL VILLAGE	02
11	TIMBERLAKE VILLAGE	07
12	KIRTLAND HILLS VILLAGE	02
13	GRAND RIVER VILLAGE	03
14	FAIRPORT HARBOR VILLAGE	05
15	NORTH PERRY VILLAGE	01
16	PERRY VILLAGE	01
17	MADISON VILLAGE	01
18	LAKELINE VILLAGE	07
19	CONCORD TOWNSHIP	01
20	PERRY TOWNSHIP	01
21	LEROY TOWNSHIP	01
22	MADISON TOWNSHIP	01

Buttons: Close, Add, Delete, Print, Update Districts

Field/Button	Description
Code	Enter the code for the subdivision.
Subdivision	Enter the political subdivision.
District	Enter the district.
Close	Closes the table
Add	Adds a political subdivision to the table.
Delete	Deletes the political subdivision.
Print	Prints a list of subdivisions.
Update Districts	



## Program Codes

**Add/Delete/Modify Program Codes Table**

Code	Program	Update Module	Fund #
100	CHILD HEALTH	00	
101	BCMh		
102	EARLY INTERVENTION		
103	PKU/GENETICS		
104	IMMUNIZATIONS, CHILD		
105	IAP GRANT		
106	WELCOME HOME		
107	HEARING SPEC. POD		
108	EMPLOYEE HEALTH		
109	COMMUNICABLE DISEASE		
110	FLU		
111	SUPERVISORY		
112	HIV/AIDS		
113	PLACEMENT PHYSICALS		
114	TUBERCULOSIS		
115	LEAD		
116	ADULT IMMUNIZATIONS		
117	HEALTH DISTRICT GENERAL BUSINE		
118	TIME OFF		
119	EARLY START		
120	HEALTH PROMOTIONS		
121	TRAFFIC SAFETY GRANT		

Buttons: Close, Add, Delete, Print

Field/Button	Description
Code	Enter the program code.
Program	Enter the program.
Update Module	
Fund #	
Close	Closes the table
Add	Adds a program code to the table
Delete	Deletes the code
Print	Prints a list of the program codes.



## Distribute Nurse's Daily Mileage

The screenshot shows a dialog box titled "Distribute Daily Mileage" with a blue border and a close button in the top right corner. The main text is in red and blue. Below the text are two date input fields labeled "From date" and "To date", each containing "||". To the right of these fields are two buttons labeled "OK" and "Close".

**Use this procedure if you enter your mileage as one total for the whole day.**

This procedure will use the mileage entered for each person on a given day and distribute it evenly across each program code. The last entry in that day might be adjusted to reflect the total amount for that day. If you do not want a particular program code to receive a portion of that mileage, enter an "X" in the update column in the program code table.

From date:  To date:

OK Close

Use this procedure if you enter your mileage as one total for the whole day. This procedure will use the mileage entered for each person on a given day and distribute it evenly across each program code. The last entry in that day might be adjusted to reflect the total amount for that day.

If you do not want a particular program code to receive a portion of that mileage, enter an "X" in the "Update Column", in the "Program Code" table.



## Field Names

Field Name	Data Base Field Name
# OF REFERRALS	NDW.REF_NO
# OF SCREENING	NDW.SCREEN_NO
ACTIVITY CODE	NDW.ACT
AGE	NDW.AGE
COMP TIME	NDW.COMP
DATE	NDW.DATE
DISEASE CODE	NDW.DISEASE
DISPOSITION	NDW.DISPOS
ENTRY #	NDW.ENTRY
ENTRY #	NDW.C_ENTRY
FLEX TIME	NDW.FLEX
FROM ODOMETER READING	NDW.F_ODOM
ID #	NDW.ID
LOCATION	NDW.LOCA
LOCATION ADDRESS	NDW.LOC_ADDR
LOCATION NAME	NDW.LOC_NAME
LOCATION NOTES	NDW.LOC_NOTE
MARITAL STATUS	NDW.MS
MILES	NDW.MILES
NURSE/EMPLOYEE	NDW.HSEMP
OTHER	NDW.OTHER
PLACE OF VISIT	NDW.PV
POLITICAL SUB. CODE	NDW.PS

The **field names** listing can be very useful in determining what fields you wish to utilize to merge data for letters or when creating adhoc reports. The Field Name column is used to merge data into letters. Enter the field name in capital letters in the body of the letter surrounded by asterisks (no spaces between asterisks and field name).



## General Profile

**General Profile**

Demographics | General | Management | Environmental | Community & Public Health Services | Vital

Health Department

Division

Address1

Address2

City  State  Zip

County

Phone #'s  FAX #

Federal Tax ID

Commissioner

Client/Server Location

2004  2003  2002  2001  2000  1999  1998

Make Checks Payable to:

Close

The **General Profile** allows you to fill out the basic information for your health department.



## General

**General Profile** ✖

Demographics

General

Management

Environmental

Community & Public Health Services

Vital

Activate Pull-Downs  
 Default to Profile Area Code  
 Amount Per Mile  
  
 Display Odometer Readings for Daily Work Sheets  
 Name of Signature File  
  
 Export / Import Server Location  
  
 This is a Lap Top for Export / Import Function  
 Memory Problem - "Not Responding"  
 Environmental / Use Street Name Table

### Options for Printing Letters

 Letters-1/4 inches from top  
 Letters - 1 3/4" left margin  
 Letters - 2" left margin  
 Letters - 2 1/4" left margin  
 Letters - 2 1/2" left margin  
 Print Return Address on Envelopes

Field/Button	Description
Activate Pull-Downs	Activates the "pull down" menus in HDIS
Default to Profile Area Code	Defaults every phone number area code to the area code entered in the "General Profile" on the "Demographics" page.
Amount Per Mile	Enter the amount of money received per mile for personal vehicle usage.
Display Odometer Readings for Daily Work Sheets	Allows you to enter mileage using odometer readings for your Daily Work Sheets.
Name of Signature File	
Export/Import Server Location	
This is a Lap Top for Export/Import Function	Check if the PC is being used out in the field.
Memory Problem – "Not Responding"	



Environmental/Use Street Table	
Letters – ¼ Inches from Top	Choose how many times you would like to move your letter down from the top of the paper.
Letters – 1 ¾" left margin	Check to begin printing your letters 1 ¾" left of the margin.
Letters – 2" left margin	Check to begin printing your letters 2" left of the margin.
Letters – 2 ¼" left margin	Check to begin printing your letters 2 ¼" left of the margin.
Letters – 2 ½" left margin	Check to begin printing your letters 2 ½" left of the margin.



## Community & Public Health Services – Nurse’s Dailies

**General Profile**

Demographics | General | Management | Environmental | **Community & Public Health Services** | Vital

Adult Immunizations | BCMH | Childhood Immunizations | Clinical Services | Communicable Disease | Flu Clinics

HIV/AIDS Testing | Help Me Grow | Lead Clinics | **Nurses Dailys** | TB Testing | Welcome Home | Appointments | Match

- Nurse's Daily's - Edit Check PS, Prgm, Act, Time
- Nurse's Daily's - Edit check last add
- Nurse's Daily's - Hide Political Subdivision
- Nurse's Daily's - Display Name & Address for Mileage
- Nurse's Daily's - Display Name & Address Always
- Nurse's Daily's - Display Notes
- Nurse's Daily's - Display # Seen
- Nurse's Daily's - by login & password
- Nurse's Daily's - Indicate Flex of Comp
- Nurse's Daily's - Display Additional Fields
- Nurse's Daily's - Display Additional Fields # 2
- Nurse's Daily's - Style 2 - Delaware County
- Nurse's Daily's - Style 3 - Richland County

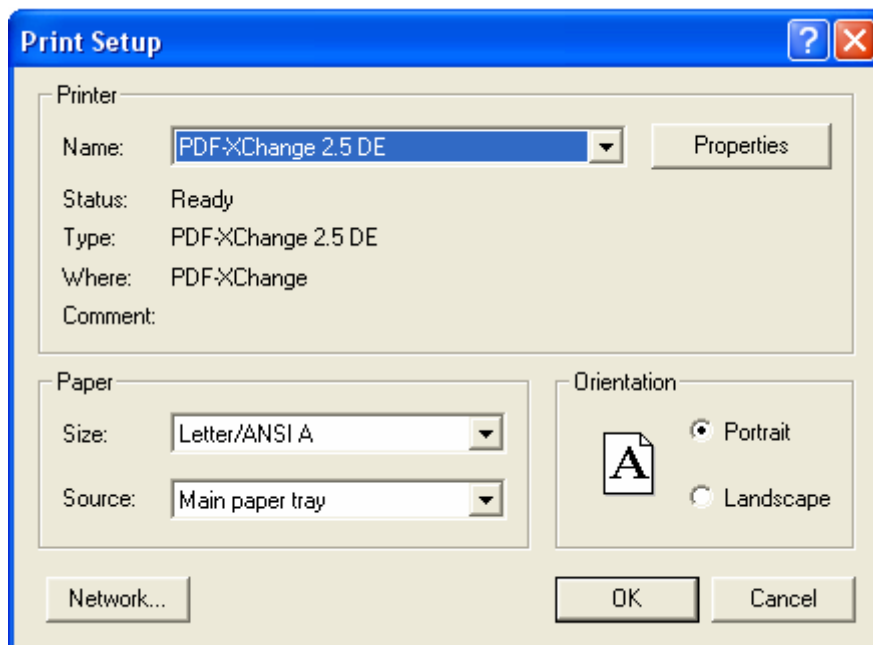
**Remove Fields From Data Entry Screen**

- Nurse's Daily's - Vehicle
- Nurse's Daily's - Miles
- Nurse's Daily's - ID # & Name

The Nurse’s Daily’s tab under the General Profile allows you to pick and choose what fields to include or not include in the Nurse’s Daily Work Sheet module. Please contact our office if you have any questions on these options.



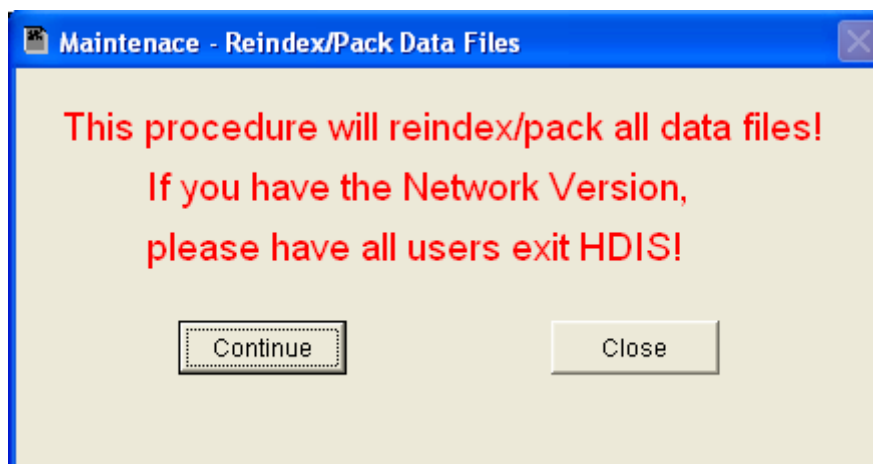
## Printer Setup



The print setup allows you to choose what printer you would like to print from. Pick the printer in the name dropdown and click “**OK**”.



## Reindex/Pack Data Files.



This function is only needed should your data be corrupted due to a power failure. Please contact CHC Software if you have any questions or concerns.