



*Enhancing Healthcare  
Outcomes*

**Getting Started With**

**DiaTrends<sup>®</sup>**

**Version 4.1.36**

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## Introduction

Welcome to DiaTrends® version 4.1.36 - the key to a targeted approach to enhanced diabetes care.

Developed by practicing clinical endocrinologists, DiaTrends helps overcome the inherent difficulty of translating current diabetes guidelines into the labor-intensive actions required to help our patients achieve good outcomes.

- ✓ Please read the information below for insights as to how to most effectively use this innovative software in your practice.
- ✓ Please see referenced sections of the DiaTrends version 4.1.36 *Installation and Administration Guide*.
- ✓ Additional background information and tips are readily available in embedded topic-driven and context-sensitive “Help” throughout the DiaTrends program as explained below.
- ✓ To view a 127 slide annotated demonstration of the current version of DiaTrends, with a focus on efficient entry of the "Minimum Data Set," go to: <http://www.overlooksoftware.com/demo.aspx>  
(The download of this demo works best with high-speed Internet access. The demo is also available on the "Demo and Resources" CD that was in your product package.)

DiaTrends is an interactive information system specifically designed to enhance the quality of the diabetes care you provide to your patients and to document your outcomes so that you can prove the quality of your care.

*DiaTrends helps you use your valuable time to stay focused on the key processes of diabetes care.* It serves as an organizational tool to help you adhere to published guidelines. DiaTrends is remarkably easy to use. Data entry is simple, quick and intuitive. The data entry time per patient encounter is more than made up for by the organizational structure and improved productivity that the data entry, data review and trend analysis processes add to the effectiveness of each encounter.

Chronological prompts facilitate rapid development of an agenda for each encounter. DiaTrends will help you develop systematic approaches to improving the efficiency and quality of your diabetes care.

*DiaTrends is a quality-enhancement tool based on the principle that “what gets measured gets done.”* It helps you keep the processes of care up-to-date. Once you begin real-time reviews of your aggregate key indicators data, you will discover an added incentive to optimize each patient encounter, namely the opportunity to incrementally improve your overall performance measures. You will see trends toward improvement, if for no other reason than it feels good to have good numbers!

You will have the opportunity to set specific goals for yourself (or your diabetes care team) and to readily track your progress toward meeting those goals.

DiaTrends is not intended to serve as a stand-alone medical record, but rather as an interactive tool that complements your medical records while enhancing your productivity and the quality of your diabetes care. This strategy provides several advantages. You will have the option to gradually phase in entry of various data elements over the course of several visits. You can think big, but start small. You will maintain the flexibility of continuing to use your medical records (paper or electronic) in your preferred format. However, DiaTrends can easily print a diabetes summary report that could serve as an adjunct to a paper medical record if you so desire.

DiaTrends is simple, intuitive, flexible and networkable. It functions readily in a multi-user environment, allowing a collaborative effort by diabetes educators and other members of your diabetes care team. Key indicators of diabetes education are tracked. Features such as the HbA1c report card also enhance opportunities for patients to become active participants in their own care.

*Once you've entered a significant number of patients, you will want to begin using DiaTrends built-in robust reporting capabilities. Multiple "Key Indicators" are available to provide you with a quick overview of the percentage of your patients who are meeting certain key objectives. From the "Key Indicators" window you are able to select up to five parameters to which you can assign your provider goals. From the "Progress Toward Goals" window you are able to track your progress toward meeting those goals. In addition, by selecting parameters and filters from the user-friendly and intuitive "Report Generator," you can readily obtain real-time answers to nearly any quality of care issue.*

## Context-Sensitive Help

Although DiaTrends is carefully designed to be simple and intuitive to use, extensive embedded "Help" is readily available in case you have questions or wish to review background information.

Topic-driven help can be accessed from the main menu (select "Help" then "Contents" for a list of main help topics; or select "Help" then "Search For Help On..." to search by keyword).

Context-sensitive help (the help topic most closely related to the active window) can also be accessed by using the F1 key, or by simply clicking on the help button ("??") on the toolbar.

## Completing Setup

The separate *DiaTrends Installation and Administration Guide* contains detailed instructions on installation of DiaTrends in a “Single-User” (stand-alone PC) or “Multi-User” (networked) environment and activation of its database via license deployment.

Once you have completed those steps, you (or your DiaTrends administrator, if you are in a multi-user or network configuration) should take a few moments to complete the setup process as below, if this has not been done already. (These post-installation setup instructions are also included in The *DiaTrends Installation and Administration Guide*.)

These setup configurations and preferences can be changed at any time, although some may be limited by the parameters of your license.

When you start DiaTrends for the first time, two dialog boxes will be displayed with questions asking you about the glycohemoglobin test methods used in your practice and your preferences for verification of older dates:

### ❖ **Specifying HbA1c Methodology**

When you start DiaTrends for the first time, an option window will be displayed with two questions asking you about the glycohemoglobin test method used in your practice. Your answers to these questions determine how DiaTrends behaves with respect to entering HbA1c values:

- ✓ The first question asks if you are using a true HbA1c methodology for your glycohemoglobin tests. Answering “Yes” to this question allows you to enter HbA1c values. Answering “No” or “Don’t Know” to this question disables the ability for you to enter HbA1c values on both the “Quick Data Entry” panel and the “Glycemic Control” screen.

**IMPORTANT:** Users are strongly urged to enter only true HbA1c values - preferably National Glycohemoglobin Standardization Program (NGSP) certified. Other glycohemoglobin methods such as HbA1 or total glycohemoglobin have different normal and target ranges and should not be recorded in the HbA1c fields due to functional implications. For example, certain features, including HbA1c Report Card, HbA1c results on the Diabetes Summary Report, conversion of HbA1c to estimated average glucose, reports involving HbA1c, and Key Indicators assume true HbA1c results are being recorded. The HbA1c data entry fields (on both the Quick Data Entry panel and the Glycemic Control window) are disabled unless the user has indicated that a true HbA1c method is being used. If you are not currently using such an assay, we suggest you consider changing to one prior to using DiaTrends for HbA1c tracking. Using a true HbA1c method allows you to provide

patients with diabetes results that can be directly related to the risk of development or progression of long-term diabetes complications. This also has the potential to be especially important in the future if you wish to compare your aggregate results with those of other diabetes care providers.

- ✓ The second question (which is optional) asks if your HbA1c test method is certified through the National Glycohemoglobin Standardization Program as traceable to the Diabetes Control and Complications Trial. For further information, including an updated list of currently certified assay methods, go to the National Glycohemoglobin Standardization Program web site at: [www.missouri.edu/~diabetes/ngsp.html](http://www.missouri.edu/~diabetes/ngsp.html)). Your answer to this second question does not affect the behavior of DiaTrends.

Once you have answered these questions and clicked the “OK” button, this glycohemoglobin methodology window will no longer be displayed when you start DiaTrends. You can always change your answers by selecting “View” and then “Options/Configuration” from the DiaTrends menu. Then select the “Application Options” tab and click on the “Glycohemoglobin Method” button to re-display this window.

#### ❖ **Historical Date Verification Preference**

When you start DiaTrends for the first time, an option window will ask your preference for verification of older dates entered during the data entry process, allowing you to specify the number of months beyond which you will be alerted to verify that the date entered is correct.

- ✓ The purpose of "Historical Date Verifications" is to reduce the risk of inadvertent entry of incorrect dates. Although some users may choose to backfill with older data in order to make full use of the system, most data will be entered close to the time it was generated. This screen allows you to choose the time interval beyond which DiaTrends will ask you to confirm the accuracy of certain older dates you enter. For example, if you choose 3 months, DiaTrends will alert you to confirm data points more than 3 months old. If you expect to enter a significant amount of historical data from over 3 months ago, you may want to select a longer interval.
- ✓ This feature can be turned off for the duration of any DiaTrends session.

Once you have answered this question and clicked the “OK” button (thus setting your default number of months), this preference window will no longer be displayed when you start DiaTrends. You can always change your default by selecting “View” and then “Options/Configuration” from the DiaTrends menu. Then select the “Application Options” tab and then click the “Historical Date Verifications” button to re-display this window.

Most other DiaTrends options (as discussed in detail below) are set or changed on the “**Options/Configuration**” screen, which is easily accessed from the main menu at the top of DiaTrends by selecting “View” and then “Options/Configuration.”

### ❖ Adding New Users (User Names)

Logging in to DiaTrends always requires a “User Name” and a “Password.” DiaTrends is initially supplied with the following administrative defaults for “User Name” and “Password:”

“User Name:”	admin
“Password:”	diatrends

As noted above, this “User Name” and “Password” are entered to use DiaTrends for the first time.

Each person using DiaTrends should have his or her own unique “User Name.” In a multi-user network configuration this is typically set up by the administrator.

In fact, one of the first tasks the administrator should do is to add a new “User Name” (other than “admin”) for his or her own use. This is because “admin” only has access to certain administrative features of DiaTrends. For security reasons, “admin” is blocked from being able to use any patient-specific features of DiaTrends. When the user needs to have full access to patient-specific features, DiaTrends must be closed and the user must log in with a different (other than “admin”) User Name.

To add additional user names:

1. Log in to DiaTrends as a user with Security Level “Admin” (initially with the above defaults for “User Name” and “Password”).
2. From the menu at the top of the main DiaTrends window, select “View” and then “Options/Configuration.” The “Options/Configuration” window will open.
3. Select the “User Settings” tab on the “Options/Configuration” window.
4. Click the “Add New User” button. The “Add New User” window will open.
5. Under “Log In Information” enter:
  - User Name: At least 3 characters. Not case-sensitive. Typically informal, such as the user’s first or last name or initials or nickname. Must be unique.

- Password: At least 8 characters. Must include both alpha and numeric characters. May include special keyboard characters. Case-sensitive. Must be entered twice to confirm.
  - Password (Confirm): Must exactly match above.
6. Under “Personal Information (Optional)” enter (if desired):
- Name (First, Middle and Last): Documents the identity of this user. If entered, displays on the “User Settings” tab.
  - Email Address: Facilitates contacting this user. Not linked to any other features.
7. Review “Security Settings” for this user:
- Security Level: User(s) assigned Security Level “Admin” have certain administrative privileges (such as patient deletion, setting up user-defined fields, exporting data to Microsoft Access, making physicians active vs. inactive, changing a user’s security settings, adding new users, and setting up security options) that user(s) assigned Security Level “User” (which is the default) do not have.
  - Account Status: The default is “Active” for each user. The “admin” or other users with Security Level “Admin” can make a user “Inactive” in order to block him or her from being able to log in to DiaTrends. Upon attempting to log in, an “Inactive” user is notified of the inactive user account status and is advised to contact the system administrator for further information. The Account Status for user name “admin” is always “Active.”
  - Locked Out: The default is “Not Locked” for each user. Depending on Security Options selected, an individual user account may be blocked from additional login attempts after 3 unsuccessful login attempts within a certain time period, until the “admin” or another user with Security Level “Admin” resets this field to “Not Locked” for that user. (In the unlikely event that the “admin” gets locked out, which requires a much larger number of unsuccessful login attempts, the administrator will need to contact Overlook Software, Inc. for unlocking instructions).
  - Last Log In: Displays the date and time the selected user last successfully logged in to DiaTrends. Blank for a new user.
8. Once a new user begins using DiaTrends, he or she should change their password as instructed in the next section.

## ❖ Changing Your Password

The User Name “admin” is permanent (it provides certain unique administrative privileges), but for security purposes it is strongly recommended that one of the first tasks the administrator do is to change the “Password” of the User Name “admin” from the default one provided by Overlook Software, Inc. In fact, each login by “admin” using the default password will trigger a reminder message to change that password.

Passwords for other users that are set up by the administrator should be changed by each user (when starting to use DiaTrends and periodically thereafter).

DiaTrends allows each user to change his or her password (or the password of other users, if logged in as a user with Security Level “Admin”) at any time.

Each institution is required by current law to review and develop internal policies regarding the security of patient-identifiable health information. DiaTrends is designed to provide considerable flexibility in this regard. For example, you should consider whether your internal requirements for the length and/or complexity of “User Names” and “Passwords” need to be greater than those required by the DiaTrends program itself. You should consider instituting a policy requiring each user to change his or her password at regular intervals.

“User Names” and “Passwords” should be kept confidential, so as to help protect the confidentiality of patient records.

To change a password:

1. Log in to DiaTrends using the “User Name” (“admin” or other) for which you want to change the “Password.”
2. From the menu at the top of the main DiaTrends window, select “View” and then “Options/Configuration.” The “Options/Configuration” window will open.
3. Select the “User Settings” tab on the “Options/Configuration” window.
4. Double click a “User name” or highlight a “User Name” and click “Edit User” button.
  - ✓ If you are logged into DiaTrends as a user with Security Level “Admin” you may select any “User Name” from the list of users displayed on the “User Settings” tab, in order to change the password for the selected user. Otherwise, you will only be able to change the password for the “User Name” with which you logged in.
5. On the “Edit User” window, overwrite the existing “Password” with the new “Password” (twice). Click “Save & Close” button.

Be sure to remember your password. You will need it each next time you log in with this “User Name.” If you forget your password, the administrator can help you assign a new password, or you can contact Overlook Software for assistance. Contact Overlook Software if you forget the password for the “admin” user name (even if it has been changed).

### ❖ Practice Information

On the “Practice” screen you can enter your “Practice Name,” which is a required field. This “Practice Name” appears on certain reports. This is typically the name of the physician or clinic. Simply overwrite the default “[Your Practice Name Here]” text. If this field is blank, the “Save” and “Save & Close” buttons are disabled.

Address and phone number are optional.

To access the “Practice” screen, go to the DiaTrends main menu, select “View” and then “Options/Configuration” and then the “Practice” tab.

After entering your practice information, click “Save” or “Save & Close.”

### ❖ Application Options

You can configure the behavior of certain DiaTrends features (listed in the table below), using several optional settings in the “Application Options” dialog window.

Notes:

- ✓ In a network environment, changing the settings of some application options (these **global options are listed in bold** in the table below) affects how DiaTrends behaves on all workstations (and for all “User Names”), while other options (not bold below) are specific to the preference set by the particular user (“User Name”).
- ✓ If other users are actively using DiaTrends when you change the setting of a global option, the other users will not begin using the new setting until they close and restart DiaTrends.
- ✓ See embedded “Help” for further information about the DiaTrends features which can be adjusted.

After making any desired changes, click “Save” or “Save & Close.”

The following options are available for configuration by going to the main menu at the top of DiaTrends, selecting “View” and then “Options/Configuration” and then the “Application Options” tab:

Option	Description	Default
<p><b>Do you want to assign each patient's "Patient ID" (unique identifier)?</b></p>	<p>Selecting 'Yes' (recommended) requires you to assign a unique Patient ID to each new patient that is entered. For example, you may want to use an existing medical record or billing number.</p> <p>Selecting 'No' causes DiaTrends to automatically assign a unique Patient ID (starting with 1) to each new patient as they are entered.</p>	<p>'Yes'</p>
<p>Enable "Set (diagnosis) indicator to Yes?" pop-up messages on Quick Data Entry screen?</p>	<p>Selecting 'Yes' sets DiaTrends to automatically pop-up diagnostic indicator reminders when entering certain values on the "Quick Data Entry" screen.</p>	<p>'Yes'</p>
<p>Show Cardiovascular Events screen automatically upon patient selection?</p>	<p>Selecting 'Yes' causes DiaTrends to display the "Cardiovascular Events" screen each time a patient is selected (provided the same patient has not already been selected within the last 7 days).</p>	<p>'Yes'</p>
<p><b>Weight/Height to be entered in (units)...</b></p>	<p>Selecting 'Pounds/Inches' sets DiaTrends to record and calculate measurements in English units.</p> <p>Selecting 'Kilograms/Centimeters' sets DiaTrends to record and calculate measurements in metric units.</p> <p>You must be logged in as an administrator to toggle this selection.</p> <p>[Caution: Changing this option and clicking 'Save' or 'Save &amp; Close' will launch a conversion of all existing weight and height data].</p>	<p>'Pounds (lbs.) / Inches (in.)'</p>

<b>Charges and Reimbursement Tracking</b>	<p>Selecting ‘Use Categories’ sets the “Charges” and “Reimbursements” screens to provide categories in which to record various charges and reimbursements.</p> <p>Selecting ‘Use Total’ sets the “Charges” and “Reimbursements” screens to provide for entry of only total charges and total reimbursements.</p>	‘Use Categories’
Show progress towards goals on startup?	<p>Selecting ‘Yes’ causes DiaTrends to display the “Progress Towards Goals” screen each time you log in.</p> <p>You may want to set to “No” until you have enough aggregate data to begin setting and tracking progress toward goals in relation to that aggregate data.</p>	‘Yes’
Default number of HbA1c values for HbA1c Report Card	<p>Indicates the maximum number of HbA1c values (counting backwards from the most recent) you want to display by default on patients’ “HbA1c Report Cards.”</p> <p>Can override on “Glycemic Control” screen for individual patient.</p>	‘10’
Historical Date Verifications	<p>Specifies the number of months (3, 6, 9, 12, 18, 24, 36, 48 or 60) beyond which you will be alerted to verify that the date just entered is correct.</p>	(Set by each user)
<b>Glycohemoglobin Method...</b>	<p>Specifies whether you are using a true HbA1c test method.</p> <p>Answering “Yes” to this question allows you to enter HbA1c values.</p>	(Set globally by any user)

❖ **“Providers”**

You must enter at least one physician name before you can start entering patients.

**DiaTrends Physicians:** On “Options/Configuration” (“Providers” tab) enter one or more physician name(s) (with provider type “Physician”) up to the maximum number of “physician slots” allowed by your license agreement. Note that adding a patient requires assignment to a previously-entered physician (by selecting a physician name in the dropdown list on the “Patient Information” screen).

Need to add physician slots to your DiaTrends license? Just contact Overlook Software, Inc. at (336) 274-0066 or support@overlooksoftware.com.

**Default Physician:** You may want to click the checkbox to “Display (on this workstation) data for this physician for the “Current HbA1c Average” on toolbar, as well as the “Key Indicators,” “Progress Toward Goals,” and “HbA1c Trends” screens” if desired (for the one physician who will primarily be using this workstation). If no physician name is checked, the current HbA1c average on toolbar (on this workstation) will be for patients of all physicians, or, depending on your license, may default to the physician with the highest patient count.

**Other Providers:** You may want to add other provider (dietitian, nurse educator, eye specialist, foot specialist, and other provider) names and information. If so, eye and foot specialist names are then displayed in drop-down lists on the “Eyes” and “Feet and Lower Extremities” windows in case you wish to track which patients see these providers. Phone number and e-mail information is optional for all providers.

The following option is available for configuration (if there is more than one “Physician” name by going to the DiaTrends main menu, selecting “View” and then “Options/Configuration” and then the “Providers” tab:

Option	Description	Default
Default Physician	Specifies the physician (if any) to be set as the “default” physician for the currently logged-in user. The default physician is the one whose data displays by default for “Current HbA1c Average” in toolbar, as well as for “Key Indicators,” “Progress Toward Goals,” “HbA1c Trends,” and “HbA1c Distribution.”	Set by each user.  Can override for any report.

## Adding Patients

Once you have added a physician name (see page 12) and completed the other setup tasks above, you are ready to begin adding patients. For further information, you may want to review the embedded “Help” topics *How to Add a Patient Record* and *Patient Information Window* which provide valuable background information.

*It is strongly recommended that, over time, you systematically enter all of your active patients with diabetes into DiaTrends to help ensure data integrity.* Doing so will allow you to avoid selection bias and to maximize the statistical power of the built-in reports. Once a patient is registered into DiaTrends it’s important to enter all the data for that patient, to avoid the “dilutional” effect that would result from patients who are registered but have incomplete data sets. Aggregate report data is obviously more valid if all patients are entered and actively tracked. (However, most reports exclude patients with glucose intolerance and gestational diabetes, so entering patients with those diagnoses is optional.)

Most users, after starting to use DiaTrends, will prefer to add each patient and enter his or her pertinent information at (or shortly before) the time of that patient’s next encounter. This has the advantages of spreading this task out over time, as well as assuring that each patient has current data as soon as he or she is entered.

## Entering Patient Data

DiaTrends is designed for flexibility and seamless entry into your workflow. Its power and ease of use are best appreciated by hands-on use. In a short period of time you will learn how to most efficiently fit it into your practice style.

Here are some general suggestions:

A typical flow of events in a busy practice with established patients might be as follows at the time of initial patient entry into DiaTrends (see embedded “Help” if needed for more detailed recommendations):

- In some practice environments, the registration and data entry process is shared between physicians and ancillary staff.
- Add (register) the patient by way of the “Patient Information” window accessed from the toolbar or main menu. *Note that all required fields (indicated in bold) under both the “Demographics” and “Patient Status” tabs need to be completed in order to save a new patient.*

- Click “Save & Select” to open up his or her “Home Page.”
- Go to the necessary windows to enter current patient data.
  - ✓ *You will want to develop a systematic approach to entering data for each registered patient.* For example, you may want to first enter cardiovascular events, then long-term complications and comorbidities, then current medications, then other data such as smoking status, weight, blood pressure, HbA1c, lipids, eye exam, foot exam, and microalbumin.
  - ✓ You may wish to defer to a subsequent visit (or not use at all) certain screens such as acute metabolic complications, hospitalizations and patient education. This will minimize the time impact of the initial data entry process, and still allow you to enter complete data over the course of 2-3 visits. Remember that report results will lag behind if you are using any type of phased-in data entry.
  - ✓ Please note any required “Minimum Data Set” if you are participating in a patient registry project.
- Click on “Quick Data Entry” button (on “Home Page” or on Navigation Bar on the left side of the window) to begin entering current data. Note the convenient auto-dating and “set default date” features. Of course, these dates can be easily adjusted using the Visual Date Entry Tool (pop-up calendar) if the data element is from a date other than today or the default date.
- Go to data detail windows (by left mouse click from pertinent section of “Home Page,” right mouse menu selection from pertinent section of “Home Page,” or Navigation Bar) to enter additional pertinent information.

## Quick Data Entry Panel

The “Quick Data Entry” (QDE) panel (see above) allows you to quickly and easily enter many different data elements (and associated dates) from a single window.

*Most users enter all or most data from a typical office visit using the “Quick Data Entry” panel, easily navigating to detail windows to enter additional data or view trends only as needed.*

Features of the “Quick Data Entry” panel include:

- Simply click on “Today” to enter an office visit date (adjust using Visual Date Entry Tool as needed).
- Auto dating:

- ✓ Today's date appears by default as a result is entered.
- ✓ Or, the "Set Default Date" button can be clicked, and a date entered (in the date field that then appears where the button was), to set an alternate (older) default date to populate the QDE date fields as results are entered.
  
- ✓ Dates can easily be adjusted using the Visual Data Entry Tool as needed.
  
- Drop-down lists for quick entry of certain data elements.
  
- Color-coding of results: On this window, color-coding of a result occurs as soon as you exit the field. The color-coding legends may be reviewed in on-line help. Ranges for color-coding are adapted from published standards and provided for general guidance only. For any individual patient, the appropriate interpretation of any result is, of course, always subject to his or her circumstances and the provider's clinical judgment.
  
- Pop-up messages: In certain fields, if data (e.g., blood pressure) is entered which is likely to be abnormal, and you have not yet set the related diagnostic indicator (e.g., hypertension) to "Yes," a pop-up message appears (upon saving) asking whether you wish to set the related diagnostic indicator to "Yes." These pop-up messages are adapted from published standards and provided for general guidance only. For any individual patient, the appropriate interpretation of any result is, of course, always subject to his or her circumstances and the provider's clinical judgment. This pop-up functionality may be turned off or back on by accessing the "Options/Configuration" window from the "View" menu.
  
- Validation: DiaTrends helps assure data integrity (accuracy) by requiring most dates and data points to meet certain "validation" criteria (whether entered on QDE or a detail screen).
  
- Upon saving, data from the "Quick Data Entry" panel will be displayed on the "Most Recent Data" area (left side) of the "Home Page" window (if it is the most recent data), as well as on the relevant detail screen.

## Patient Flow

*As you become more familiar with DiaTrends, you will develop your own strategies for fitting it into your workflow style. You may wish to quickly review the patient's record before your encounter, making use of its features (such as color-coded real-time reminder prompts) to help develop an agenda for that visit. You may wish to print out the patient's "Diabetes Summary Report" to use as a worksheet for that visit. Then, at some point during or shortly after the visit, you should update the record with any new information.*

Some users have computer workstations or a laptop in the consult and/or exam rooms to use during patient visits. Many, however, prefer to enter data before and/or after the encounter. In that case, you may want to keep a simple list of new data elements (e.g. blood pressure, medication changes) to be added shortly after that visit. You may want to use a data entry face sheet on the front of your charts (see example on the DiaTrends resource disk). Or, you may wish to enter the data when you review your medical record later. Lab results should be entered as they become available.

*As you gain experience by using DiaTrends, you will find that the data entry time per patient encounter becomes remarkably brief, and is more than made up for by the organizational structure and improved productivity that the data entry, data review and trend analysis processes add to the effectiveness of each encounter.*

## Clinical Guidelines

Context-sensitive, menu-driven links are provided to full text of the following clinical practice guidelines:

- American Diabetes Association (ADA) Clinical Practice Recommendations
- American Association of Clinical Endocrinologists (AACE) Clinical Practice Guidelines for the Management of Diabetes Mellitus

Overlook Software, Inc. gratefully acknowledges that permission has been granted by these organizations for Overlook Software to utilize and provide these guidelines within DiaTrends. Any other use of these guidelines requires prior approval from ADA or AACE, respectively.

Several routes provide access to the ADA and AACE guidelines:

- Context-sensitive links to 27 topic menus can be accessed throughout the program by right mouse clicks or by clicking the on-screen guidelines buttons, and are also accessible from throughout the on-line help screens. Each of these topic menus provides multiple context-sensitive links to the actual full text of the guidelines.
- The guidelines are also accessible from a main guidelines menu, which provides links to these topic menus. This main guidelines menu may be accessed from the guidelines button on the toolbar (when the “Home Page” is the active window) or from the Navigation Bar (under “Resources” then “Clinical Guidelines”).
- Finally, a table of contents for each of the two sets of guidelines (ADA and AACE) may also be accessed from this main guidelines menu.

Overlook Software will provide updated clinical guidelines as they become available. Additional clinical guidelines are available via the “Website Links” screen.

## Right Mouse Functions

Many areas of DiaTrends have right mouse functionality leading to other related areas of the application. These menus typically provide, for example, links to units of measurement, detail windows, clinical guidelines, provider performance key indicators, and many other related features. To familiarize yourself with this feature, try a right mouse click over the various elements of the “Home Page” (esp. HbA1c) and review the options presented.

## Color-Coded Prompts

Many windows of the DiaTrends application display small, dynamic color-coded rectangles next to certain data fields (certain exam components, certain labs, education, vaccinations etc.) to provide the user with quick real-time visual reminders of when the related procedures may be “due.” This functionality is adapted from published guidelines and certain logical assumptions.

- Red prompts indicate a high likelihood that the procedure is due based on these guidelines and logical assumptions.
- Yellow prompts indicate that the user may want to consider whether the procedure may be due based on these guidelines and logical assumptions.
- Green prompts indicate that the procedure is likely up to date based on these guidelines and logical assumptions.
- Gray prompts indicate that the procedure is probably not currently applicable (at any time interval) for this patient.

*The color-coding and underlying logic for a prompt may easily be reviewed by a single right mouse click over the prompt.* Prompts are provided for general guidance only. For any individual patient, the appropriate frequency of any test, exam element or other procedure is, of course, always subject to his or her circumstances and the provider’s clinical judgment.

See “Common Conventions of the DiaTrends Application” in embedded “Help” for additional information on other helpful tools.

## Reports

*DiaTrends is based on the simple principle that “what gets measured gets done.” By using aggregate data to monitor processes of care and outcomes, you develop a heightened focus on improving adherence to those processes of care that lead to better outcomes. This robust reporting capability helps you develop systematic strategies for improving your delivery of diabetes care and achieving diabetes management goals within your patient population.*

DiaTrends includes a user-friendly, robust, custom “Report Generator.” This allows you to easily answer, in real-time, essentially any question you might have about your population of patients with diabetes. Reports can be filtered, if desired, by essentially any demographic subset or other relevant filters. The process of running a custom report is easy and intuitive. It involves these simple steps:

1. Select a general report topic from the “Report Generator” menu (such as “Glycemic Control”).
2. Select a more specific topic (such as “HbA1c”).
3. Choose a report type, such as “HbA1c: Range (& List),” which provides you with the number, percent and list of all active patients, meeting the selection criteria you pick, whose most recent HbA1c levels were between, above or below the level(s) you select.
4. Further define selection criteria, if desired (such as type of diabetes, age range, sex, race/ethnicity, exclusions such as newly diagnosed patients, medications, etc.). Or, simply accept the default criteria.
5. Click the “Run Report” button to view the report results. Print report if desired.

If you need a custom report that cannot be created in DiaTrends built-in robust “Report Generator,” please contact Overlook Software, Inc. at (336) 274-0066 or [www.overlooksoftware.com](http://www.overlooksoftware.com) or [support@overlooksoftware.com](mailto:support@overlooksoftware.com) for information and quotation on custom reports.

In addition to the custom “Report Generator,” DiaTrends features several built in “Provider Performance” reports that give you instant access to the most often asked questions about the population whose diabetes is being managed, allowing immediate quality improvement opportunities. For example:

- The “Current HbA1c Average” is displayed in the toolbar.
- The “Key Indicators” window displays the percentage of patients achieving key targets and processes of care. It also allows you to define your individual goals for any or all of these key indicators.

- The associated “Progress Toward Goals” window allows you to graphically track, in real time, your progress toward meeting up to five of the goals you have selected on the “Key Indicators” window.

*You will, of course, want to “raise the bar” as you successfully achieve your interim goals.*

These capabilities will provide you with the ability to tell your patients how they compare to others in the practice. Eventually you will be able to compare your treatment outcomes with others. Reporting capabilities also provide you with the key strategic advantage of being able to inform managed care organizations and other third parties that high quality care is being provided. The introduction and aggressive expansion of managed care throughout the United States has added clear emphasis to the importance of monitoring and reporting the quality of diabetes care. DiaTrends specifically fulfills this need.

## Disclaimers

Please be sure to carefully review “Important Information for Users of DiaTrends” and obtain answers to any questions you may have before using the DiaTrends application. This information is available from the Main Menu (select “View” then “Disclaimer”; or select “Help” then “About DiaTrends) or from on-line help (“Disclaimer Window”).

## Database Backups

***It is essential to perform regular backups of your DiaTrends database and to copy your backups to external media. It is also strongly recommended that you store a recent backup off-site. These easy steps will protect your investment and, more importantly, your data.***

Hard drives fail. Databases crash. Laptops get stolen. In order to protect your DiaTrends data against such calamities, it's essential to perform regular (preferably daily) backups of your DiaTrends database, to copy the backups to external media, and to store a recent backup off-site. Following a strict backup regimen should provide you with the necessary up-to-date files if for any reason you ever need to restore your data.

**The backup utility included with DiaTrends allows you to easily perform two steps necessary for secure database backups. However, it is up to you to establish a reliable backup procedure and to protect your backed-up data.**

There are two essential steps to backing up your data:

- Step 1: Run the DiaTrends backup utility (to copy the two database files to the backup directory on your hard drive), and
- Step 2: Copy the two files placed in the backup directory onto external media (such as USB flash drive, CD-R, CD-RW, USB flash memory drive, zip disks, tape, or another computer's hard drive) for safekeeping, preferably off-site.

In “Single-User” (standalone PC; non-networked) configuration, if it has been more than 3 days since your last backup you will be reminded upon exiting DiaTrends to perform a backup.

**Please see the *DiaTrends Installation and Administration Guide* (pages 43 – 48) or embedded “Help” for detailed information on performing database backups.**

You should contact your organization's system administrator or Overlook Software, Inc. technical support if you have questions or need assistance with establishing a backup procedure.

## Patient Confidentiality

Important security reminder: DiaTrends contains patient-identifiable health information (i.e. health information that is linked to the identity of individual patients), which may include personal and sensitive data, and which by law must not be viewed by or disclosed to unauthorized parties. Patient-identifiable health information must always be treated as confidential. All DiaTrends users and administrators must take appropriate measures to assure the privacy and security of this data, both within the DiaTrends application and in any format to which the data may be exported by the user. All users are responsible for appropriately protecting this patient-identifiable data in compliance with all applicable HIPAA Privacy and Security Rules and all other applicable law. The DiaTrends administrator should extend access privileges only to those persons who are permitted access to such patient-identifiable health information under the internal policies of the DiaTrends licensee and under applicable law.

## For More Information

For additional information about DiaTrends version 4.1.36, please see:

- ◆ [www.overlooksoftware.com](http://www.overlooksoftware.com)
- ◆ Embedded context-sensitive “Help,” which provides detailed information and step-by-step instructions on the use of the application.
- ◆ Annotated demonstration (127 slides) of the current version of DiaTrends, with a focus on efficient entry of the "Minimum Data Set:"
  - ◆ Online at <http://www.overlooksoftware.com/demo.aspx>  
(This demo download requires high-speed Internet access), or
  - ◆ The demo is also available on the "Demo and Resources" CD in your product package.
- ◆ The “Readme” file that installs with DiaTrends. This document provides you with last-minute updates and information about DiaTrends and we encouraged you to read it. It is displayed during DiaTrends installation setup. To access this document later, display the Windows Start menu, then select “Programs” and then “DiaTrends” and then “ReadMe File.”
- ◆ The *Installation and Administration Guide* (also available on the "Demo and Resources" CD).

## Support

For product or technical support, please contact Overlook Software, Inc. at:

Web Site: [www.overlooksoftware.com](http://www.overlooksoftware.com) Click on “Technical Support” to use the on-line form. This is the preferred mechanism for technical support.

E-mail:

For general information: [info@overlooksoftware.com](mailto:info@overlooksoftware.com)

For sales and pricing info: [sales@overlooksoftware.com](mailto:sales@overlooksoftware.com)

For technical support: [support@overlooksoftware.com](mailto:support@overlooksoftware.com)

For dialogue with physician: [physician@overlooksoftware.com](mailto:physician@overlooksoftware.com)

For web site issues: [webmaster@overlooksoftware.com](mailto:webmaster@overlooksoftware.com)

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We welcome your questions, comments and suggestions.

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