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# Win School Health

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## Guide

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Updated by Tony Yip of Chancery Software Ltd.

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# INTRODUCTION

You can use the Win School® Health module to keep track of student health information including immunizations, examinations, and conditions.

With Health, you can assign immunizations, examinations, or conditions to individual students or to a group of students, and then report on students' immunizations, examinations, and conditions.

## Getting Help

Access the Health online Help and ToolTips for more information.

ToolTips provide more information about a button or area.

### TO DISPLAY ONLINE HELP:

- From the Help menu, choose Help Topics

OR

Press F1

### TO DISPLAY A TOOLTIP:

- Pause your mouse pointer over a button or area.



## Getting Technical Support

Chancery's support programs are available by subscription and include the below services.

Technical Support

solves problems and answers questions when software doesn't produce the expected results.

Monday to Friday, 5 am to 5 pm Pacific Time

phone: 1-800-688-9939

fax: 1-800-346-0643

email: [techsupp@chancery.com](mailto:techsupp@chancery.com)

website: <http://support.chancery.com>

Web support

Chancery's web site includes a searchable knowledge base with frequently asked questions, tips, and troubleshooting, as well as support

forums for users to share experience and knowledge. Web tutorials are available on an annual subscription basis.

#### Software updates

releases of new versions with improved functions and software fixes. Updates are provided free of charge for three months from your date of purchase and are included in the subscription to Chancery Support Programs.

For more information on Technical Support Programs, call Chancery Customer Service at 1-800-999-9931 extension 130.

## Providing Feedback

To improve the quality of your documentation, we would like your comments regarding this guide. Email comments to Chancery's User Education department at [user\\_docs@chancery.com](mailto:user_docs@chancery.com).

# SETTING UP HEALTH

When you set up Health, you need to decide:

- whether to use Health in a single or multi-user environment
- where to maintain doctor information, Win School or Health
- what standards to use for Health setup information
- the schedule to update Health records
- backup schedule
- archive schedule

## Before You Start

Before you start working with Health, you must make some decisions on how you will be using Health. Thinking through how you use Health and setting up proper data standards at the beginning will save you a lot of extra work in the long run.

### Deciding on Single or Multi-User

Before you install Health, decide whether you will be using Health in a single or multi-user environment.

In single-user mode, only one workstation can use Health and everything you do in Health is done on that workstation.

In multi-user mode, many workstations are connected to the same Health database and can use Health at the same time. Several people can change information for the same student at the same time. Each person that clicks OK or Save will save his/her changes to the record. When one person adds a student, that student record is immediately available on all workstations. However, only one person at a time can archive.

Once you have installed Health in one mode, we recommend that you do not change from one mode to another.

#### **TO CHANGE FROM ONE MODE TO ANOTHER:**

- 1** Install Health 1.0 using the Release Notes that came with it. In the installation process, specify whether you want single-user or multi-user.
- 2** Install the Health 1.3 Update, and any other required updates using the Release Notes that came with those updates.

## Determining Data Standards

Before you work with Health, decide on the standards for Health information.

Data standards establish school-wide and district-wide conventions for setting up and entering data. Determining standards regulates terminology, maintaining consistent spelling, abbreviations, and capitalization.

Before you start working with Health, decide on the standards for:

- immunization titles, doses, reactions, populations, requirements, alternate requirements, and provisional enrollment period
- examination titles, statuses, categories, and codes
- condition titles, levels, and comments

## Using Unique Codes for Each School

If you are using only one Health database, skip this section.

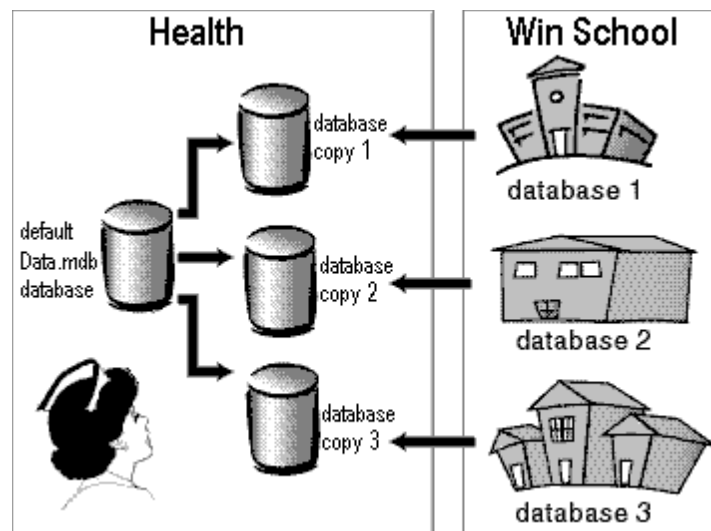
If you are using multiple Health databases, you can either use the same setup information for all databases or different setup information for each database.

First, make a copy of the default database as a backup. Then make one copy of the database for each school.

To use the same codes for all schools, copy the Health database file after you set up standard immunization, conditions, and examinations.

Conversely, to use unique codes for each school, copy the Health database file before you start.

The following diagram illustrates creating one copy of the Health database for each school.



#### **TO CREATE COPIES OF THE HEALTH DATABASE FILE:**

- 1** To use standard immunizations, examinations, and conditions for all schools, make sure you have set up Health following established standards.
- 2** In Windows Explorer, create one folder for each school database.
- 3** In the folder where you installed Health, copy your Health database file (in this example, it's Data.mdb) into the folders you created in step 2.
- 4** Rename each copy of the database in each folder with a unique file name.

## **Scheduling Routine Tasks**

Make sure there is a schedule for recurring tasks like updating Health with Win School demographic data, backing up, and archiving.

### **Scheduling Win School Updates**

Plan the best time to populate and update Health with demographic data from Win School. Include this as one of the regular tasks for Win School and Health.

Before you start working with Health, you must run WS Update to populate the database. Then, run WS Update regularly to make sure the Health database contains the current changes made in Win School.

For more information, see “Updating Data from Win School” on page 32.

### **Scheduling Back Up**

Make sure the Health data files are backed up regularly. If you use Win School, include Health as part of your Win School backup. Check with your System Administrator to make sure there is a schedule for backing up Health data files.

### **Scheduling Archive**

Plan the best time to archive records. You only need to archive records when student records have been deleted from the Win School database. For example, your school might only delete student records at the end of the school year.

If you work in a multi-user networked environment, plan when to archive student records, because only one user can archive records at a time.

For more information, see “Archiving Data” on page 42.

## **Using Task Checklists**

Use the following list of tasks to check when and what you must set up, work with, and archive.

### **STARTING THE SCHOOL YEAR**

- set up and maintain Win School School Setup and Details
- install Health
- back up and copy the Health database file
- set up database connections
- connect to the school database
- set up user accounts
- specify where to maintain doctor information
- populate Health with Win School data and set up schedule to regularly update Health with Win School data
- create and load a Health archive file
- establish backup and archive schedule
- set up standard immunizations, examinations, and conditions
- set up immunization requirements
- specify the provisional enrollment period and the school year start date
- enter student medical information

### **WORKING DURING THE SCHOOL YEAR**

- maintain student information
- assign, change, or delete immunizations, examinations, and conditions
- update Health with Win School data regularly
- generate reports
- export data to other software
- if necessary, change database connection

### **FINISHING THE SCHOOL YEAR**

- archive Health records in a data file
- if necessary, generate final reports
- if necessary, export data to other software

## **Logging On**

Everyone who uses Health should have his/her own username and password. To guard against unauthorized access to the database, make sure users do not share usernames and passwords.

## Logging On for the First Time

You need database administrator access to log on the first time and set up Health.

After you log on, you must change the DBAdmin password to keep the Health database secure.

### TO LOG ON TO HEALTH FOR THE FIRST TIME:

- 1 From the Start menu, choose Programs, choose Win School, then choose Health.
- 2 In the Logon dialog, type DBAdmin in both the “Name” and “Password” fields.

Usernames and passwords are case sensitive, so you must type uppercase and lowercase characters correctly.

- 3 Click OK.
- 4 In the message telling you that Health is not connected to a Health database file, click OK.
- 5 In the Database Connection Setup dialog, specify a Health database connection following the procedure below.
- 6 Change the DBAdmin password. See “Changing Passwords” on page 11.

## Logging On

If you do not know your username and password, see your System Administrator. Do not share your username and password with others. Each person should have his/her own username and password.

### TO LOG ON TO HEALTH:

- 1 From the Start menu, choose Programs, choose Win School, then choose Health.
- 2 In the Logon dialog, type your Username and Password.

Usernames and passwords are case sensitive, so you must type uppercase and lowercase characters correctly.

- 3 Click OK.

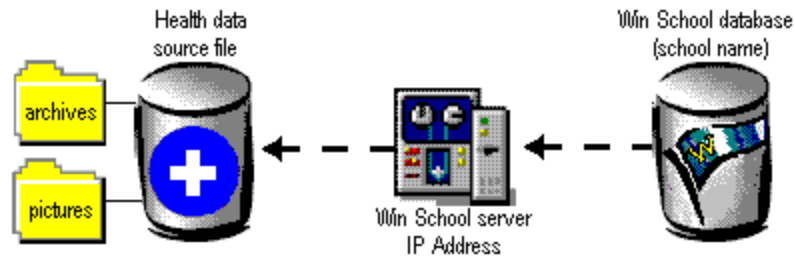
## Setting Up a Database Connection

When you log on, Health automatically connects to the last database you selected.

The first time you log on, you must specify the database to which you want to connect.

You can connect to another database at any time.

If you travel from school to school, you can use Health on a laptop computer to connect to Win School databases in different schools. For more information, see “Using a Laptop Computer to Connect to Win School Databases” on page 10.



#### TO SET UP A DATABASE CONNECTION:

- 1 From the File menu, choose New Connection. If you are logging on for the first time, the New Connection dialog opens automatically.

If you want to define a new connection, click Add first. If you change an existing connection, the existing information is replaced.

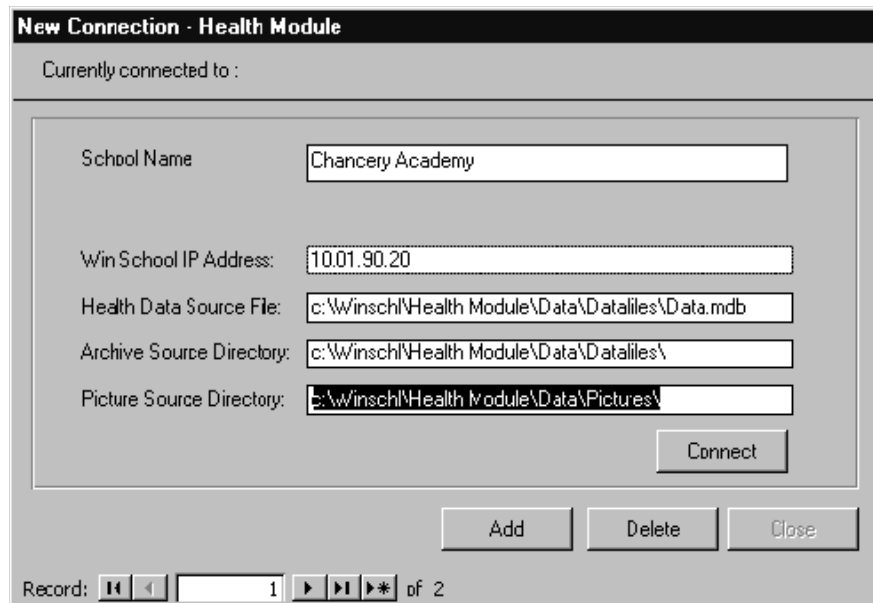
You must connect to a database to continue.

- 2 In the School Name field, type the school name exactly as it is in the Win School database. The school name is case sensitive so type upper and lower case characters exactly.
- 3 In the Database Name field, make sure the school name is correct.
- 4 Type the Win School IP Address. This number uniquely identifies the Win School Server. See your System Administrator for this information, typically numbers and periods, such as 10.01.50.60. Type the number exactly as it appears in the Win School server, including any leading zeros.
- 5 Type the path and file name of the Health database file.
- 6 Type the path of the archive files and the picture bitmap files.

You must name each bitmap file using the student’s number, and then store the files in the Picture Source Directory.

If you already have student pictures for Win School that uses student numbers as the bitmap file name, you can share the same folder for the Health student pictures.

For example, a student named John Smith with the student number 1054682 would have a picture in the bitmap file named 1054682.bmp in c:\winschl\health module\data\pictures.



- 7 To enter information for another school, click Add, click Yes to save the changes, then repeat steps 2 through 5.

To display the settings for a different school, click the left or right arrow buttons, or specify its record number at the bottom.

- 8 To connect to a school, use the left or right arrow buttons to display that school in the School Name field. Then click Connect.

Follow the onscreen instructions to complete the connection.

Make sure the top of the dialog shows the name of the school to which you want to connect.

**TO CHECK THE SCHOOL NAME IN WIN SCHOOL:**

- 1 Start Win School. Then start School Setup.
- 2 From the School menu, double-click School Information.
- 3 From the School Information popup menu, choose Extended Information.

## Connecting to a Database

You can connect to different Health databases that have been set up, in one school or in different schools.

You can use Health on a laptop computer to connect to Win School databases in different schools.

The procedure to connect to a Health database is the same whether you are using a desktop or laptop computer. As long as you have set up the Health database connection correctly, and you are on the same computer network as the database you want, you can connect to that database.

## Using a Laptop Computer to Connect to Win School Databases

If you travel from school to school, you can use Health on a laptop computer to connect to Health databases in different schools.

### TO CONNECT TO A DIFFERENT HEALTH DATABASE:

- 1 If you are using a laptop computer, make sure you are connected to the school's computer network. Then from the File menu, choose Open Connection.

The Database Connection dialog opens showing the Current Connection and the School Name popup menu.

- 2 From the School Name popup menu, choose the school you want. Click Connect.
- 3 Follow the onscreen instructions to complete the connection.

## Setting Up User Accounts and Passwords

Set up user accounts to guard against unauthorized access to the database.

Instruct users to contact the system administrator if they:

- forget their password
- find that their password no longer works
- suspect that others are using their password

Also instruct staff not to write down their passwords in a place where others can see it.

It might be useful for the database administrator to keep a list of user accounts in a secure location.

## Setting Access Levels

User accounts have one of the following access levels:

- Read Only lets you view information, generate reports, and export data. You can change your own password but you cannot make any other changes.
- Full Access lets you view and edit information. You can also change your own password.

- DBA (Database Administrator) lets you view and edit information. You can create and delete user accounts, and change user passwords. You must have at least one DBA account.

## Changing Passwords

All users can change their own password. Only users with DBA access can change other accounts' passwords.

### TO CHANGE PASSWORD:

- 1 From the Setup menu, choose Change Password.  
If you have DBA access, you can select which account password to change.
- 2 Type in the old password. Then type the new password in the New Password and Confirm text boxes.
- 3 Click OK to confirm the password change.
- 4 Click Cancel to close the Change Password dialog.

## Managing User Accounts

You must have DBA access to create, modify, or delete user accounts.

Username and passwords are case sensitive, for example, JoAnne is different from Joanne.

### TO CREATE USER ACCOUNTS:

- 1 From the Setup menu, choose User Accounts.
- 2 In the Setup User Accounts dialog, click Add User.
- 3 Type the Username. Then type the password in the Password and Confirm text boxes.

Username and passwords must be 4–14 characters long and are case-sensitive.

- 4 Select an Access Level radio button. Click OK.
- 5 A dialog confirms the account is created. Click OK.
- 6 To continue creating accounts, click Add User.
- 7 When you have finished, click Done.

### TO DELETE USER ACCOUNTS:

- 1 From the Setup menu, choose User Accounts.
- 2 In the Setup User Accounts dialog, click Delete User.
- 3 From the popup menu, select the account you want to delete. Click OK.
- 4 A dialog asks for confirmation. Click Yes to delete that account.

5 A dialog confirms the account is deleted. Click OK to return to the Setup User Accounts dialog.

6 When you have finished, click Done.

**TO MODIFY USER ACCOUNTS:**

1 From the Setup menu, choose User Accounts.

2 In the Setup User Accounts dialog, click Modify User.

3 From the popup menu, select the account you want to modify. Click OK.

4 Select a different Access Level. Click Done.

5 A dialog confirms that permissions for the account is changed. Click OK.

6 When you have finished, click Done.

## Setting Up Doctor Information Source

Decide where you want to maintain doctor information. You can enter doctor information in either Health or Win School.

If you maintain doctor information in Win School, that information is updated in Health when you click WS Update or choose Update from Win School Database from the File menu.

If you maintain doctor information in Health, both doctor and dentist information is maintained in the Student Profile. However, the doctor information in Health may be different from that in Win School.

If you change to importing doctor information from Win School, any doctor information presently in Health is replaced by the information in Win School.

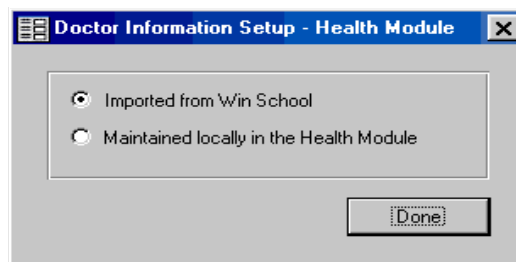
**TO SET UP DOCTOR INFORMATION SOURCE:**

1 From the Setup menu, choose Doctor Information Source.

2 To maintain doctor information in Win School, select “Imported from Win School”.

OR

To maintain doctor information in Health, select “Maintained locally in the Health Module”.



- 3 Click Done.

## Setting Up Immunizations

Immunizations include any type of medication provided to students to prevent infection.

Set up the immunizations required by State and Federal mandate, and by your school district.

Setting up immunizations includes several phases. See the following sections for details of each phase and how to set it up.

- Setting up immunization names and doses.
- Setting up immunization reactions.
- Setting up the requirements for each immunization dose, such as when each dose must be administered.
- If your school or district uses provisional enrollment, set up the Provisional Enrollment Period.

You do not need to set up Immunization Actions as that is already set up as part of Health.

After you have set up immunizations, if you change any immunization name, dose, reaction, or requirement, students will automatically have the changed immunization name, dose, reaction, or requirement.

After you have set up immunizations, if you delete any immunization name, dose, reaction, or requirement, students will immediately lose the deleted immunization (and all its doses), dose, reaction, or requirement. There is no undo.

## Setting Up Immunization Titles and Doses

Set up the immunizations required by State and Federal mandate, and by your school district.

Immunization titles are the types of immunizations given to students such as polio and MMR.

Doses are specific doses of immunizations, such as a booster shot or one in a series of immunization doses.

All immunization actions, for example Administered, are assigned to a dose and not to the entire immunization. For this reason, each immunization must have at least one dose.

**TO SET UP IMMUNIZATION TITLES AND DOSES:**

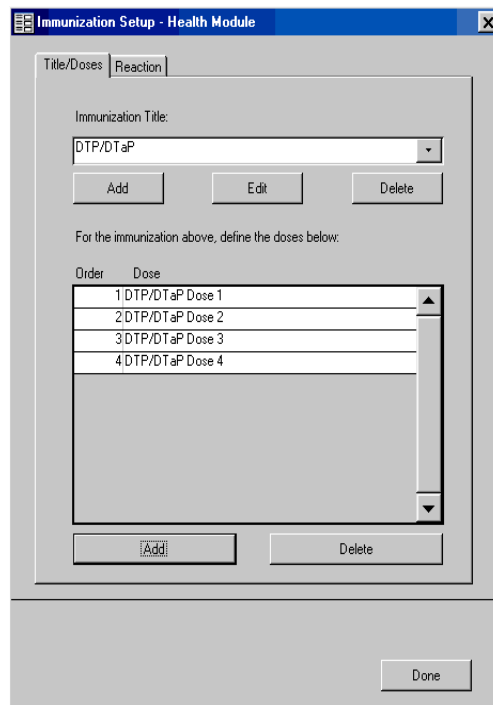
- 1 In the Main window, select Setup and choose Immunizations Setup.  
The Immunization Setup dialog displays the Immunization Title at the top and the doses/series for that immunization at the bottom.
- 2 In the Immunization Title area, click Add and type an immunization name. The name appears in the text box at the bottom. Click OK.

When you add an immunization, its first dose is automatically added. Each immunization must have at least one dose.

- 3 To change a dose name, select the dose name and type a new name.
- 4 To add a dose, click Add in the Doses area. Then type the order and the name of the dose. Click OK.

The order is the sequence in which Health displays the doses. For example, dose order 1 can be “infant dose 1”, order 5 can be “youth booster”, and order 12 can be “adult booster”. The doses are displayed by order sequence and not alphabetically by name.

Follow the above step to add all doses for the displayed immunization.



- 5 Repeat steps 2 to 4 to add other immunizations and doses.
- 6 When you have finished setting up immunizations and doses, click Done.

## Changing and Deleting Immunizations and Doses

Once you have set up and started using immunizations and doses, they are assigned to student records.

If you delete a dose that is assigned to students, those students will lose that dose. If you delete an immunization, students with that immunization will lose that immunization, including all its doses. There is no undo and the only way to get the information back is to restore from a backup.

### TO CHANGE AN IMMUNIZATION TITLE:

- 1 In the Main window, select Setup and choose Immunizations Setup.
- 2 In the Immunization Title popup menu, choose the Immunization you want to rename. Click Edit.
- 3 Type the new title and click OK.

### TO DELETE AN IMMUNIZATION:

- 1 In the Main window, select Setup and choose Immunizations Setup.
- 2 In the Immunization Title popup menu, choose the Immunization you want to delete. Click Delete.

A warning informs you that deleting an immunization deletes all its doses. All students with that immunization will lose that immunization and all its doses. There is no undo.

Click Yes to delete that immunization and all its doses.

### TO CHANGE A DOSE NAME:

- 1 In the Main window, select Setup and choose Immunizations Setup.
- 2 In the Immunization Title popup menu, choose the Immunization you want to work with.
- 3 In the Doses area, click the dose you want to change, and make changes in the dose list.

### TO DELETE A DOSE:

- 1 In the Main window, select Setup and choose Immunizations Setup.
- 2 In the Immunization Title popup menu, choose the Immunization you want to work with.
- 3 In the Doses area, click the dose you want to delete, and click Delete in the Doses area.

A dialog shows the dose you are about to delete. All students with that dose will lose that dose. There is no undo.

- 4 Click Yes to delete that dose.

## Setting Up Reactions to Immunizations

You can set up possible reactions to immunizations, such as allergic reactions.

Reactions are accessible by all immunizations. Set up reactions once and you can assign them to all immunizations.

### TO ADD IMMUNIZATION REACTIONS:

- 1 In the Main window, choose Setup and select Immunizations Setup.
- 2 In the Immunization Setup dialog, click the Reaction tab.
- 3 Click Add and type a reaction. The reaction appears in the text box at the bottom. Click OK.
- 4 To add more reactions, repeat the above step.
- 5 When you are done, click Done to close the Immunization Setup dialog.

## Changing and Deleting Immunization Reactions

When you delete a reaction, any students with that reaction will have the reaction reset to N/A. There is no undo for deleting a reaction.

When you change a reaction, any students with that reaction will automatically have the edited reaction. There is no undo.

### TO CHANGE OR DELETE IMMUNIZATION REACTIONS:

- 1 In the Main window, choose Setup and select Immunizations Setup.
- 2 In the Immunization Setup dialog, click the Reaction tab.
- 3 To change a reaction, select the reaction in the list and type a new reaction.  
All students with that reaction automatically have the changed reaction.
- 4 To delete a reaction, click the reaction to select it and click Delete.  
A dialog tells you how many students have that reaction, which will be changed to N/A. Click Yes to confirm you want to delete that reaction.
- 5 Click Done to close the Immunization Setup dialog.

## Setting Up Immunization Requirements

After you set up an immunization requirement, Health checks the student's birthdate or current grade to determine which immunization doses the student should have received.

Populations are groups of students who must have received an immunization. Populations can be based on age or grade. For clarity, use the student group as the population title, for example, "Grade 2–3" or "5–6 years."

You must set up populations to cover the entire student age range, and populations must not overlap.

Students must be in a population to have immunization requirements and to show up in reports. For example, if there is no population for 3–4 year-olds, then you cannot assign any immunization requirements to this age group, and they will not be in any Health reports.

In addition to defining the age or grade range for a population, you can also define the following:

- which immunizations and doses need to be administered
- minimum age when a dose must have been received
- whether a previous dose must be administered first
- the time period between doses in an immunization
- whether a dose must be administered within a time period, for example, if a dose must have been received within the last year
- alternate immunization, if an immunization can be replaced by another, such as using the measles vaccine as an alternate for MMR

For example, for the 5–6 year-old age range, students must have received 4 doses of DTP/DTaP, 3 doses of Polio, and 1 dose of MMR. You can set up a population called “5–6 years” with those immunization doses.

The chart below is an example of the populations you can set up with the required doses for that population (age range.)

Population	Polio dose 1	Polio dose 2	Hib - Child	Hib - Adult
5 - 6 years	✓		✓	
7 - 11 years	✓	✓		✓

Health checks that the series of individual doses have been administered, not just the number of doses. For example, Health checks that a student has received dose 1 and dose 2, and not dose 1 twice.

To set up immunization requirements, first set up populations, then set up the immunization requirements for each of the populations.

### Mapping Out Immunization Populations and Requirements

Before you set up immunization requirements, map out each population and every immunization dose each population needs.

You must be absolutely certain of the following:

- You have populations to cover all ages or grades.

Students that are not in any population cannot have immunization requirements assigned to them and will not show up in any report.

- None of the immunization requirements conflict with another.

If there are conflicting immunization requirements, including alternate requirements, reports and provisional enrollment calculation might be incorrect and you cannot tell which requirement is used.

## Setting Up Populations and Requirements

Set up both populations and immunization requirements in the same dialog.

For faster performance, set up only the populations you use.

Never overlap populations. For instance, if the range for population 1 is ages 5–10, do not make population 2 for ages 7–12.

### TO SET UP POPULATIONS:

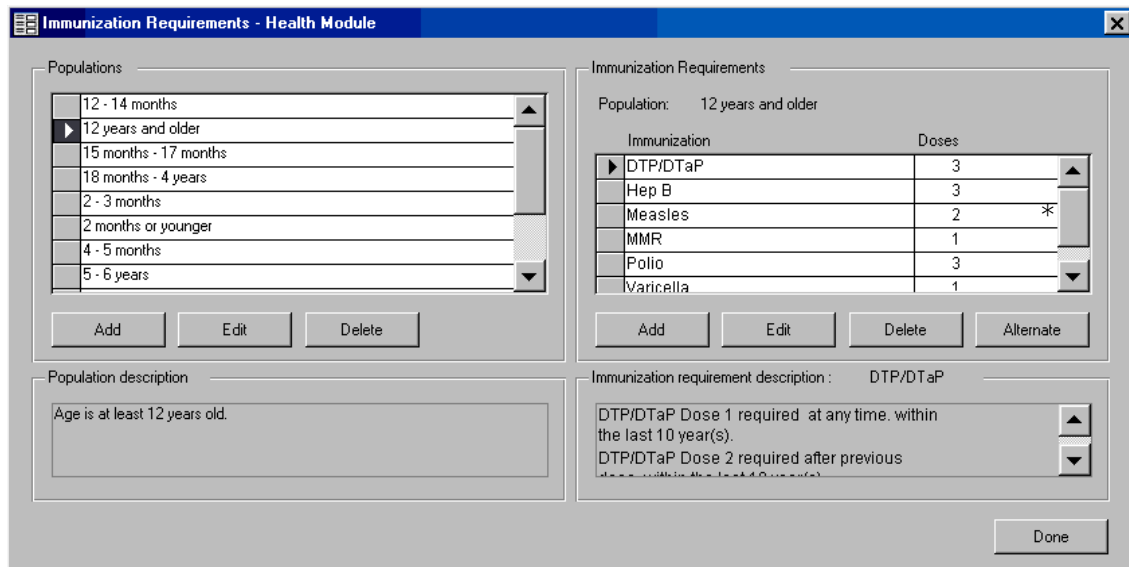
- 1 In the Main window, select Setup and choose Immunization Requirements.

The Immunization Requirements dialog shows Populations on the left and the Immunization Requirements for that population on the right.

At the bottom are descriptions of the population and the requirement.

The arrow to the left of a line indicates you are working with that population and requirement. Click on a different line to work on another population or requirement. The description at the bottom changes when you select a different population or requirement.

The asterisk besides a dose indicates that there is an alternate for that dose.



- 2 To add a population, click Add in the Populations area.

- 3 In the Population Setup dialog, type a Population Name. Then define the age or grade range of that population.

The screenshot shows a dialog box titled "Population Setup - Health Module". At the top, there is a text field for "Population Name" containing "12 - 14 months". Below this is a section titled "Population Description" with four radio button options:

- Age is at least 12 months and under 15 months
- Age is under ... years
- Grade is at least ... up to and including ...
- Grade is ...

At the bottom right of the dialog are "OK" and "Cancel" buttons.

Population Description	Meaning
Age is at least ... months/ years and under ... months/years	The population's age must be equal to or over the lower age, and less than the higher age. In this example, the age range is 12 - 14 months, inclusive. For a population of 4 year-olds, you would define it as Age is at least 4 years and under 5 years.
Age is under/at least ... months/years	"Under" means less than the age. "At least" means equal to or over the age.
Grade is at least ... up to and including ...	The population's grade must be equal to or over the lower grade, and less than or equal to the higher grade.
Grade is under/up to and including ...	"Under" means less than the grade. "Up to and including" means less than or equal to the grade.

- 4 Click OK to return to the Immunization Requirements dialog.
- 5 Repeat steps 2 - 4 to set up another population. Make sure you have populations to cover all ages or grades. When you've finished, click Done.

You can set up all populations and then set up immunization requirements for each population. Or you can set up the requirements for the population you have set up using the following procedure.

All students must be in a population to have immunization requirements and to appear in immunization reports.

**TO SET UP IMMUNIZATION REQUIREMENTS:**

- 1 If you are already in the Immunization Requirements dialog, go to the next step. Otherwise, in the Main window, select Setup and choose Immunization Requirements.

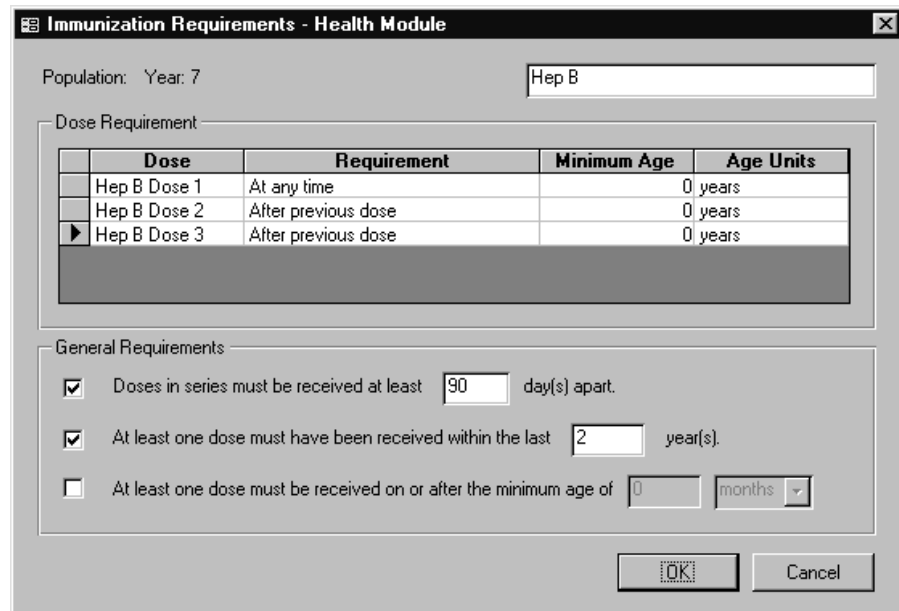
The arrow to the left of a line indicates you are working with that population and requirement. Click on a different line to work on another population or requirement. The description at the bottom changes when you select a different population or requirement.

- 2 Click a population to work with it. The arrow to the left of the population shows it is selected.
- 3 In the Immunization Requirements area, click Add.

The Immunization Requirements dialog shows the Population name at the top.

- 4 From the Immunization popup menu, choose an immunization that is required for this population.

When you select an immunization, all the doses for that immunization are displayed in the Dose Requirement area.



- 5 The icon at the left of a dose indicates you are working with that dose. Select a dose, then click on the requirement to choose a requirement from the popup menu:

If a dose:	Choose:
Can be administered anytime	At any time
Must be administered after the previous dose	After previous dose
Must be administered after a certain age	Use minimum age. Then specify the minimum age and select years or months in the Age Units column.
Is not required for this population	Not required

- 6** In the General Requirements area, specify conditions for doses.  
If doses cannot be administered too close together, select the “Doses in series must be received at least” checkbox and specify the number of days between doses. This only applies if the requirement is “After previous dose”.  
If a dose (usually the latest one) must not have been received too long ago, select the “A dose must have been received within the last” checkbox and specify the number of years.  
If a dose must be received on or after a minimum age, select the “At least one dose must be received on or after the minimum age of” checkbox and specify the age.
- 7** Click OK.
- 8** Continue to set up immunization requirements for that population. If two populations have the same requirements, set up the same immunization requirements for each population.  
An immunization requirements must not conflict with another. Otherwise you won’t know which requirement is used for reports and provisional enrollment calculation.
- 9** When you have finished, click Done.

## Changing and Deleting Populations and Requirements

If you change a population, students that meet the new population criteria will belong to the new population.

If you delete a population, all the requirements for that population will also be deleted. There is no undo.

If you change or delete a population, make sure all students still belong to a population so that they can be assigned immunization requirements.

If you delete an immunization requirement, that requirement is deleted from that population. There is no undo.

If you change an immunization requirement, students with that requirement will immediately be assigned the new requirement and provisional enrollment is recalculated for that population.

### **TO CHANGE OR DELETE POPULATIONS OR IMMUNIZATION REQUIREMENTS:**

- 1** In the Main window, select Setup and choose Immunization Requirements.
- 2** To change a population, select the population and click Edit in the Populations area.

In the Population Setup dialog, change the population title and/or description. Then click OK.

- 3 To change an immunization requirement, select the population on the left, then select the immunization on the right. Click Edit in the Immunization Requirements area.

In the Immunization Requirements dialog, make changes. Click OK.

- 4 To delete a population, select the population and click Delete.

A dialog tells you how many rules are defined for this population. Click Yes to confirm deleting this population. There is no undo.

- 5 To delete an immunization requirement, select the population on the left, then select the immunization on the right. Click Delete in the Immunization Requirements area.

A dialog tells you which requirement for which population you are about to delete. Click Yes to confirm deleting this requirement for this population. There is no undo.

- 6 Click Done to close the Immunization Requirements dialog.

## Setting Up Alternate Immunization Requirements

Some immunizations may be accepted as a substitute for another. For example, MMR might be accepted as an alternate to the measles vaccine.

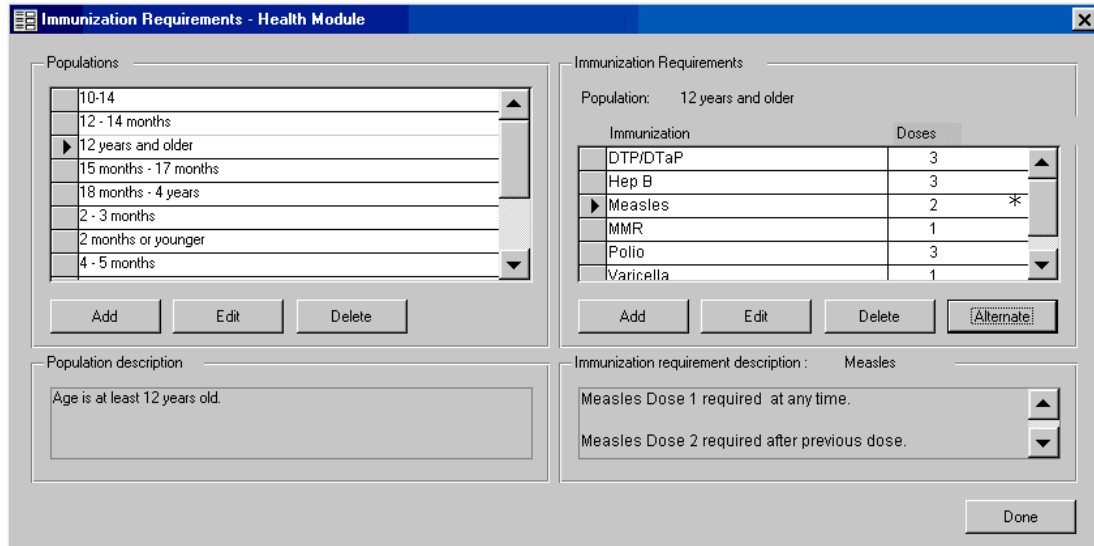
The asterisk besides a dose indicates that there is an alternate for that dose.

Make sure alternate immunization requirements do not conflict with each other. Otherwise you won't know which requirement is used for reports and provisional enrollment calculation.

### TO SET UP ALTERNATE IMMUNIZATIONS:

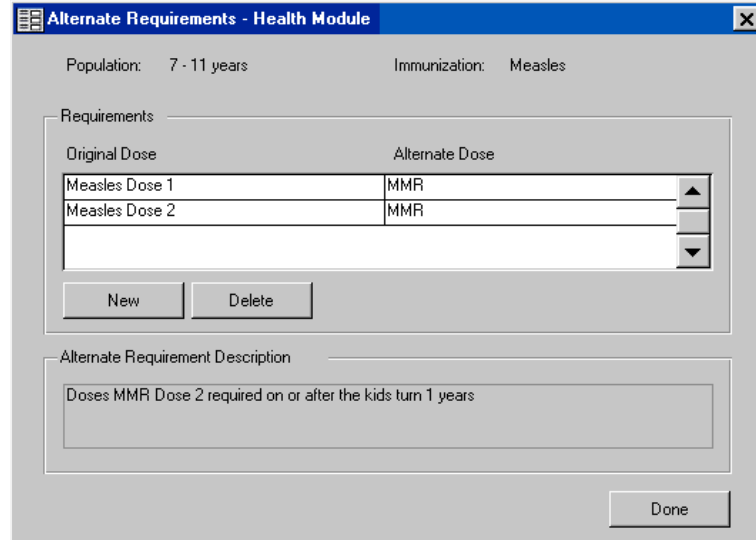
- 1 In the Main window, select Setup and choose Immunization Requirements.

- 2 Select the population and the immunization you want to work with, so that the arrows point to the correct population and immunization.



- 3 In the Immunization Requirements area, click Alternate.

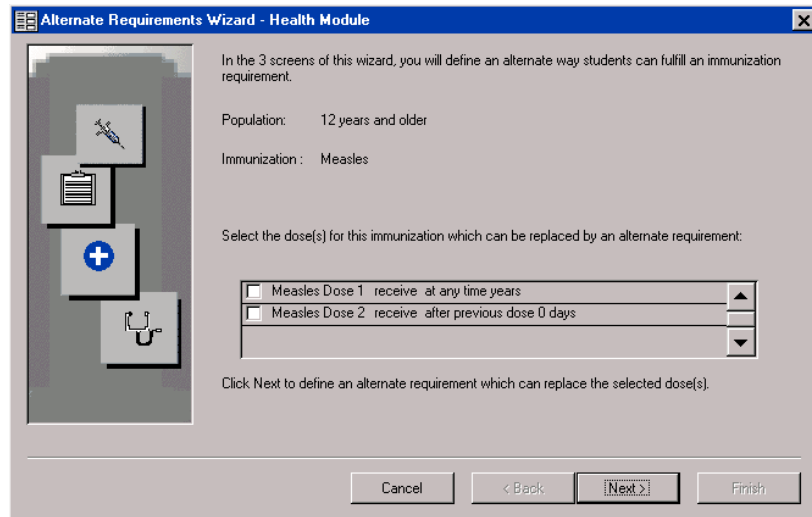
The Alternate Requirements dialog lists all the alternate immunizations for that immunization.



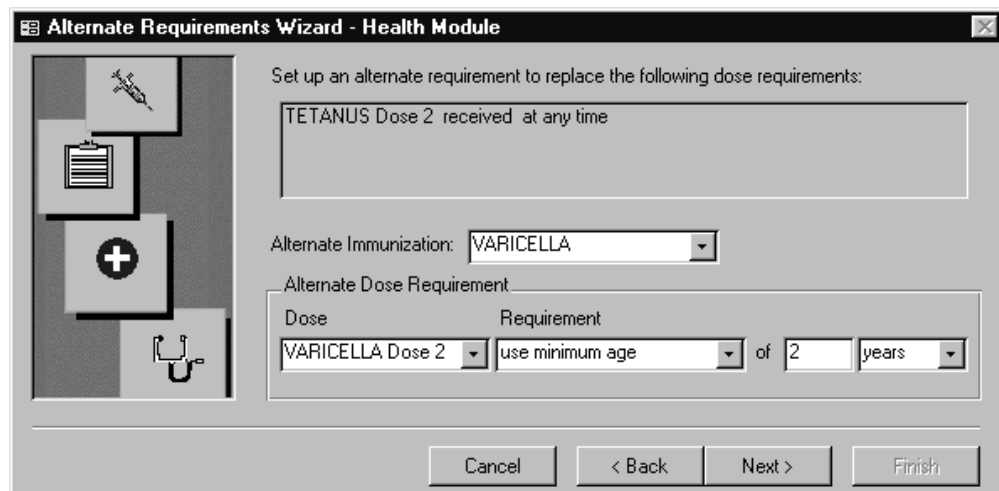
- 4 In the Alternate Requirements dialog, click New to display the Alternate Requirements Wizard.

The Alternate Requirements Wizard is a series of dialogs to assist you in setting up an alternate immunization.

The first screen of the Alternate Requirements Wizard shows the population and immunization you have selected.



- 5 Select the dose(s) that can be replaced by an alternate immunization. Then click Next.
- 6 In the second screen, select an alternate immunization, dose, and requirement. Click Next.



- 7 The final screen of the Alternate Requirements Wizard summarizes your selections, including:
  - population for this immunization
  - original immunization and dose(s)
  - replacement immunization and dose

If you need to change a selection, click Back and make changes. If everything is correct, click Finish to return to the Alternate Requirements dialog, which lists the population, original dose, alternate dose, and a description of the alternate dose requirements.

Once an alternate requirement is defined, you cannot change it. You must delete it and define a new alternate requirement.

### **Deleting Alternate Immunization Requirements**

If you delete an alternate immunization requirement, that alternate requirement is deleted from that immunization for that population. There is no undo.

You cannot change an alternate immunization requirement. You must delete it and define a new alternate requirement.

#### **TO DELETE AN ALTERNATE IMMUNIZATION:**

- 1** In the Main window, select Setup and choose Immunization Requirements.
- 2** Select the population and the immunization you want to work with, so that the arrows point to the correct population and immunization.
- 3** In the Immunization Requirements area, click Alternate.
- 4** In the Alternate Requirements dialog, select the dose you want to delete. Then click Delete.
- 5** Click Yes to confirm the deletion. There is no undo.
- 6** Click Done to close the dialog.

### **Setting Up Provisional Enrollment Period**

A student is provisionally enrolled when that student has not fulfilled all immunization requirements.

If a student does not have the required immunizations, that student is provisionally enrolled for the Provisional Enrollment Period.

After the provisional enrollment period, the student appears in the Immunization History report as Delinquent.

Set the Provisional Enrollment Period and the school year start date so Health can calculate which students are provisionally enrolled and which are delinquent.

#### **TO SET UP PROVISIONAL ENROLLMENT PERIOD:**

- 1** In the Main window, choose Provisional Enrollment Period from the Setup menu.
- 2** In the Provisional Enrollment Period text box, type the number of days.
- 3** In the Start of School Year text box, enter the first day of the school year.

- 4 Click OK.

### Calculating Provisional Enrollment Date

Students who do not meet all immunization requirements assigned to them are provisionally enrolled until they receive all required immunization doses.

A student is provisionally enrolled on the day an immunization dose is overdue or on the first day of the school year, whichever is later.

For example, if a dose is required by Jack’s 8<sup>th</sup> birthday on Oct. 1, Jack would be provisionally enrolled on the day the dose is overdue – Oct. 2. Jack would be provisionally enrolled for the provisional enrollment period or until he receives the immunization.

Another example is a dose that is required by Jill’s 7<sup>th</sup> birthday on July 1, or the start of Grade 2 on Sep. 1. In this example, Health uses the latter date for Provisional Enrollment calculation and Jill would be provisionally enrolled on the first day of school on Sep. 1.

If a student is missing multiple doses, Health calculates provisional enrollment from the first missing dose. For example, if Joe misses a Polio dose on Nov. 1 and then misses an MMR dose on Dec. 1, Joe’s provisional enrollment date would be calculated from the first overdue date – Nov. 2.

Immunization Requirement	Situation	When Provisional Enrollment Begins
At any time	Not received	Start of school year
After previous dose	Not received	Start of school year

Immunization Requirement	Situation	When Provisional Enrollment Begins
Use minimum age	Not received, or received too early	Start of school year
Doses in series must be received at least <i>n</i> day(s) apart	Not received, or received too early	Start of school year
At least one dose must have been received within the last <i>n</i> year(s)	Not received within the last <i>n</i> years	Start of school year, or <i>n</i> years after previous dose was received, whichever is later
At least one dose must be received on or after the minimum age of <i>n</i> .	Not received, or received too early	Start of school year

### Listing Provisional Enrollment Requirements

Use the Provisional Enrollment Requirements report to list the Provisional Enrollment rules in effect.

#### TO VIEW OR PRINT PROVISIONAL ENROLLMENT REQUIREMENTS:

- 1 Click Reports and choose Provisional Enrollment Requirements.



OR

From the Reports menu, choose Provisional Enrollment Requirements.

- 2 In the Provisional Enrollment Requirements Report dialog, select the population and print range options.

To display the report, click View Report at the top.

To print the report, click Print Report.

To save the report as a file, click Write to File, and specify the file format, name, and location.

- 3 When you have finished running the report, click Close.

For information on overriding provisional enrollment status, see “Overriding Provisional Enrollment Status” on page 53.

### Assigning Required Immunizations to Students (Batch Assign)

An efficient method is to pre-assign all required immunizations to all students with a blank date and N/A in the Action. Then you can run a report and see at a glance which student needs which immunizations.

As part of setting up immunizations, select the students and batch assign required immunizations to them with the Action of N/A and a blank Date.

When you administer an immunization, specify the date and select Administered for the Action. Health overwrites records with the same immunization and dose with the new date and action.

**TO BATCH ASSIGN AN IMMUNIZATION WITHOUT A DATE AND AN ACTION OF N/A:**

- 1 If you want, sort the students by clicking the column heading in the Main window.
- 2 Select the students to be assigned an immunization.

For information on sorting and selecting students, see “Viewing and Selecting Student Records” on page 46.

- 3 Click Batch Assign. Then click Immunizations.



OR

From the Edit menu, select Batch Assign Immunization.

- 4 From the popup menus, select the Immunization, then select the Dose.
- 5 Make sure Action is N/A and delete the Date.

A screenshot of a software dialog box titled 'Immunization Batch Assignments - Health Module'. The dialog has a blue header bar with a close button (X) on the right. The main area is light gray and contains the following elements: a label 'Select the Immunization you want to assign to selected students :'; four dropdown menus for 'Immunization' (set to 'Polio'), 'Dose' (set to 'Polio Dose 1'), 'Action' (set to 'N/A'), and 'Date' (empty); a text area for 'Comments'; an 'Options' section with a checked checkbox labeled 'Don't add immunization if it's already assigned with this date'; and two buttons at the bottom: 'Assign' and 'Done'.

- 6 Click Assign to begin assigning the immunization to the selected students.
- 7 A dialog shows how many students will be assigned that immunization. Click Yes to accept the batch assign.

When you administer an immunization, assign the same dose to the same students using the immunization date and an Action of Administered. For more information, see “Assigning an Immunization to Many Students” on page 57.

## Using Immunization Actions

Immunization Actions is part of Health and cannot be changed.

All immunizations must have an action. If you assign an immunization before it is administered, use N/A as the action.

When students receive an immunization, change the action to Administered.

Exemptions are for students who do not need to receive an immunization or a dose.

Immunization Actions include:

- N/A
- Administered
- Illness exemption
- Medical Exemption
- Military Exemption
- Parental Exemption
- Religious Exemption

For information on exempting one student, see “Viewing or Updating Student Immunizations” on page 59. For information on exempting many students, see “Assigning an Immunization to Many Students” on page 57.

## Setting Up Examinations

Examinations include any type of review of a student’s physical or emotional condition, including screenings.

An examination can include any type of:

- health screening, such as vision or spinal screening
- review of a student’s physical status
- review of a student’s emotional status
- examination because the student is complaining of an ailment
- impromptu examination because of other conditions or immunizations

The Examinations Setup dialog is divided into four areas:

- Examination Title
- Examination Status
- Examination Category
- Examination Code

**TO SET UP EXAMINATIONS:**

- 1** In the Main window, select Setup and choose Examinations Setup.
- 2** In the Examination Title area, click Add and type an Examination Title into the text box. Click Done.
- 3** To add an Examination Status for the selected Examination Title, click Add in the Examination Status area and type a status in the text box. Click Done.

Repeat to add more statuses to the selected Examination Title.

- 4** To add an Examination Category for the selected Examination Title, click Add in the Examination Category area and type a category in the text box. Click Done.

Repeat to add more categories to the selected Examination Title.

- 5** To add an Examination Code for the selected Examination Category, click Add in the Examination Code area and type a code in the text box. Click Done.

The Examination Codes you see only apply to the selected Examination Category.

Repeat to add more codes to the selected Examination Category.

- 6** Repeat steps 2 - 5 to add examinations.
- 7** When you've finished, click Done.

## Deleting Examinations

Once you have set up and start using examinations, they are assigned to student records.

If you delete an examination, students with that examination will lose that examination. If you delete an examination title, all its associated statuses, categories, and codes are also deleted. If you delete an examination category, all its codes are deleted. There is no undo.

You cannot change an examination. You must delete it and define a new examination.

#### TO DELETE AN EXAMINATION:

- 1 In the Main window, select Setup and choose Examinations Setup.
- 2 To delete an examination title, select the title and click Delete in the Examination Title area. All the statuses, categories, and codes for that examination are deleted.
- 3 To delete an examination status, select the status and click Delete in the Examination Status area.
- 4 To delete an examination category, select the category and click Delete in the Examination Category area. All the codes for that category are deleted.
- 5 To delete an examination code, select the code and click Delete in the Examination Code area.
- 6 When you've finished, click Done.

## Setting Up Conditions

Conditions are any type of physical or emotional incident or circumstance not covered by immunizations or examinations.

You can use conditions to keep track of:

- any medical conditions or incidents
- medications given
- actions taken
- connections to other conditions, immunizations, or examinations

For example, you can use conditions to keep track of accidents or persistent complaints from students in a part of the school.

Once you have set up and start using conditions, they are assigned to student records.

If you delete a condition, students with that condition will lose that condition. There is no undo.

You cannot change a condition. You must delete it and define a new condition.

#### TO SET UP CONDITION TITLES:

- 1 In the Main window, choose Health Condition Title from the Setup menu.
- 2 To add a condition, click Add and type a Condition title. Click OK.
- 3 To delete a condition, select a condition and click Delete.
- 4 Select a condition to be the default.
- 5 When you've finished, click Done.

#### TO SET UP CONDITION LEVELS:

- 1 In the Main window, choose Health Condition Level from the Setup menu.
- 2 To add a condition level, click Add and type a Condition level. Click OK.
- 3 To delete a condition level, select a condition and click Delete.
- 4 Select a condition level to be the default.
- 5 When you've finished, click Done.

#### TO SET UP CONDITION COMMENTS:

- 1 In the Main window, choose Health Condition Comment from the Setup menu.

To add a comment, click Add and type a comment. Click OK.

To delete a comment, select a comment and click Delete.

- 2 Select a comment to be the default.
- 3 When you've finished, click Done.

## Using Health with Win School

When you use Health with Win School, some factors can help you work more effectively with the two programs:

- Do not change first or last student names in Win School. To ensure that student data is consistent and that health information is not assigned to the wrong student, Health checks that the student's first and last name are the same before updating demographic information into Health.
- In Win School, after you run Next Year Prep and before you run Current/Next Year Merge, add students in the same order in both the current year and next year databases.

## Updating Data from Win School

Set up a schedule to regularly update the Health database with Win School demographic data. This will ensure you are working with current Win School data. Win School does not automatically update Health.

If you are updating a large number of students, the data transfer might take some time.

If you are using a modem, data transfers take longer.

Contact your System Administrator for the update schedule.

When you run WS Update, if Health finds that the data may be inconsistent between Win School and Health, Health may not run WS Update. For more information, see "What to do When a Student's Name Changes" on page 34.

#### **TO UPDATE HEALTH WITH WIN SCHOOL DATA:**

- 1** Make sure you are connected to the correct Health database. From the File menu, choose Open Connection.
- 2** In the Main window, click WS Update.



OR

From the File menu, choose Update from Win School Database.

- 3** In the confirmation dialog that appears, click Yes to update your Health database.

The Data Transfer Status dialog shows update progress. Updating a database with many students may be a lengthy process.

When the update is complete, check the Data Transfer Status dialog for results of the update, then click OK to close the dialog.

### **Maintaining Doctor Information**

When you set up Health, you specified where to maintain doctor information: Win School or Health.

If you maintain doctor information in Win School, that information is updated in Health when you run WS Update. You can view but cannot change doctor information in Health.

If you maintain doctor information in Health, you can edit that information in Health. However, that information may be different from what is in Win School.

For more information, see “Setting Up Doctor Information Source” on page 12.

### **Differences Between Health and Win School**

Some student information is maintained in Win School. When you run WS Update, that information is updated in Health. That is why it is important to run WS Update regularly to be sure student information in Health is current.

Most student demographic information is maintained in Win School. That information can be viewed, but not changed, in Health.

#### **INFORMATION THAT IS MAINTAINED IN WIN SCHOOL INCLUDES:**

- Doctor Information (if you chose to maintain it in Win School and not Health)
- Student Disability

- Call Ambulance
- Call Doctor
- Can Treat
- Legal Alert
- Win School Medical Alert and comments
- Student demographic and personal information such as name, address, phone number, student number, medicare number, social security number, and so on.
- All contact information including Contact 1 - 4 and Emergency Contact 1 and 2.

**INFORMATION THAT IS MAINTAINED IN HEALTH INCLUDES:**

- Doctor Information if you chose to maintain it in Health and not Win School
- Health user accounts and passwords
- Health Medical Alert and comments
- Student immunization, examination, and health condition information

### **Using Health with Different Win School Databases**

You can use Health on a laptop computer to connect to Win School databases in different schools. For more information, see “Using a Laptop Computer to Connect to Win School Databases” on page 10.

### **What to do When a Student’s Name Changes**

If you change a student’s name in Win School, Health will update information to a student with a different name. This ensures data consistency so that health information is not assigned to the wrong student.

Normally, student information is consistent in Win School and in Health. Occasionally, student information may become different. For example, if you run Next Year Prep and then add students in a different order in the Current Year and Next Year databases. Another scenario is if you connect to the wrong database or an old database, such as using a laptop computer and mistakenly connects to the wrong database.

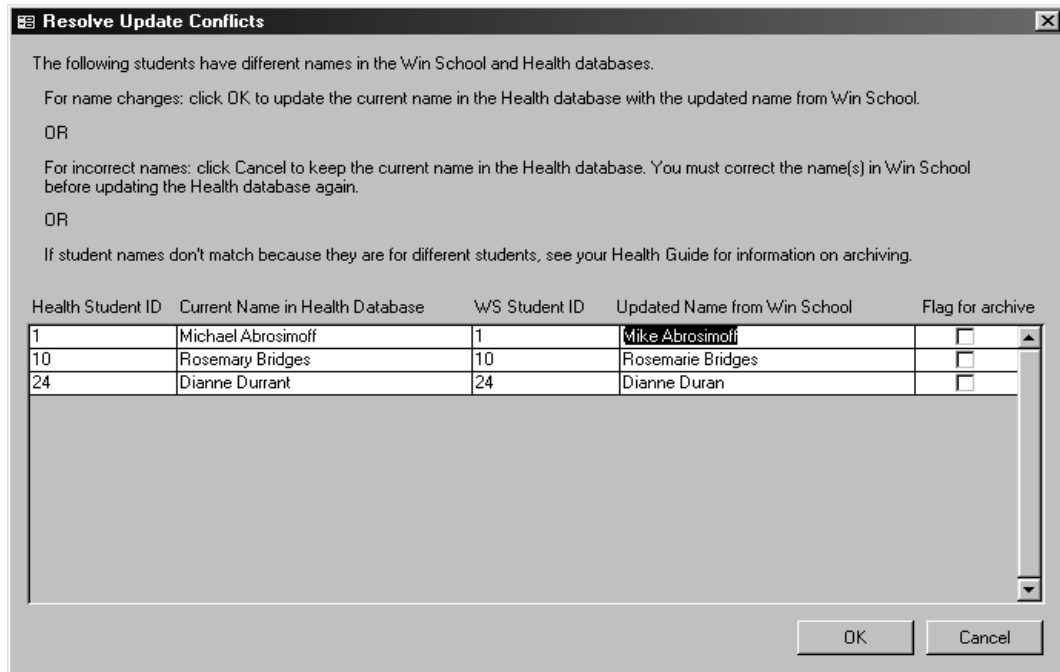
During WS Update, Health checks the student first and last name against an internal ID. These must be identical for WS Update to proceed. WS Update displays a dialog where you can confirm if:

- you changed a student’s first or last name in Win School
- you added students in a different order in the Current Year and Next Year databases between Next Year Prep and Current/Next Year Merge in Win School

When you run WS Update, if Health finds inconsistent data, you see the Resolve Update Conflicts dialog where you can do one of three things:

- update simple name changes
- find out about incorrect name changes
- flag inconsistent records for archive

In this example, you can see that these are name changes because the Health Student ID numbers are consistent in both Health and Win School.



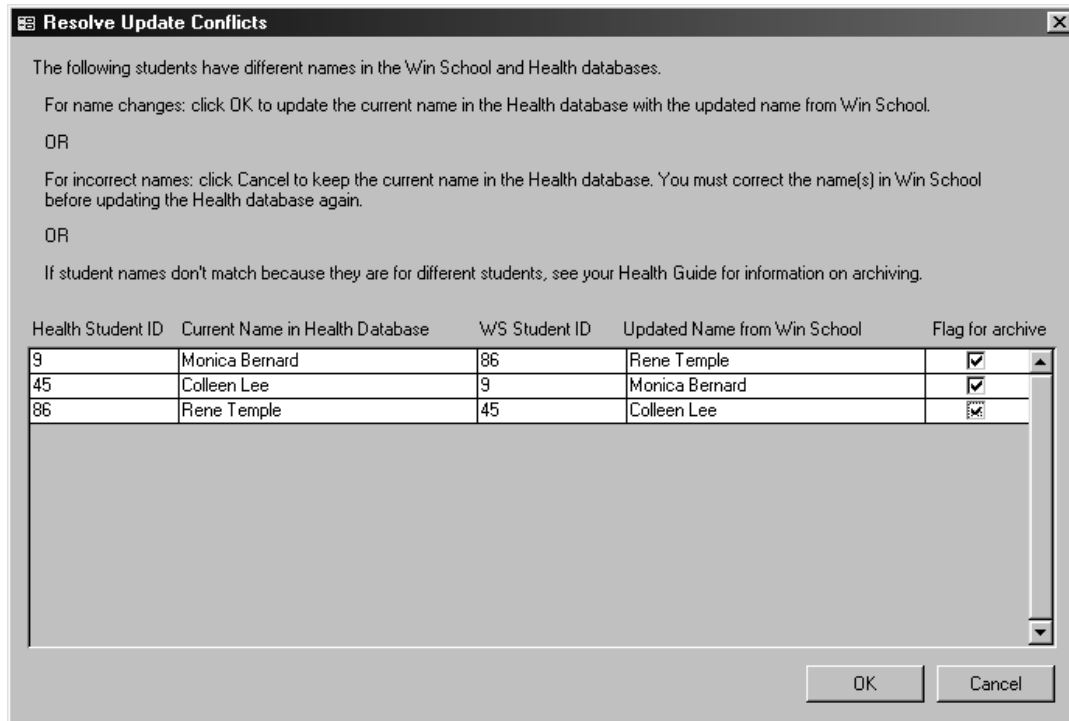
**TO UPDATE NAMES IN HEALTH:**

- Click OK. Health will update the name(s).

**TO CORRECT INCORRECT NAMES:**

- Click Cancel, correct the names in Win School, then run WS Update again.

In this example, you can see that these are different students. In this case, you will flag the inconsistent records for archive here. For information on archiving, see “Archiving Data” on page 42.



**TO FLAG THE INCONSISTENT RECORDS FOR ARCHIVE:**

- 1 Select “Flag for archive”, then click OK
- 2 Export the students records that are flagged for archive. Use a filter to export only those records with inconsistent data. If you don’t need to keep these students’ immunizations, examinations, or conditions, you can skip this step. For more information, see “Exporting Data” on page 40.
- 3 Archive the student records that has been flagged for archive. For more information, see “Archiving Data” on page 42.

Once the inconsistent records are archived, run WS Update.

- 4 Run WS Update to download the latest information from Win School. For more information, see “Updating Data from Win School” on page 32.
- 5 Import the data from the above step into Health. For more information, see “Importing Data” on page 37.

# Importing Data

If you have been using other software to maintain health records, you can import the records into Health.

To import data into Health, use one of the templates supplied with Health, making sure you must meet all the following criteria:

- all student names and student numbers must be already in Health
- all fields, including names, titles, doses, and codes, must match what you have set up in Health
- upper and lower case text must match
- you cannot import from an older version of Health
- the import file must be formatted according to the next section: “Formatting Files to Import into Health”.

## **TO IMPORT DATA FROM OTHER SOFTWARE:**

- 1** In the other software program, export your data to a text file.
- 2** Convert the text file format using the file templates in the next section: “Formatting Files to Import into Health”.
- 3** From the File menu, choose Import Data, then choose the type of records to import.
- 4** Click OK.

## Formatting Files to Import into Health

To import data from other software into Health, use one of the templates supplied with Health. You can also format the import file according to the following file templates, making sure you follow all the criteria in the previous section.

Each template contains a series of fields. Format your data to match the sequence and composition of these fields.

You must enter a carriage return as the last line of each template.

For more information, see “Appendix B: Importing Files into Health” on page 82 for file formats. If your files match the format of exported files, they can be imported properly.

If there are errors in the import, check the errors in `c:\ImportErrors.txt`, correct them, and import again.

## Health Demographic Records File Template

To import demographic records, you must meet all the following criteria:

- Make sure student last names and numbers are already in Health
- Name the import file `c:\Import_Demographics.txt`
- Type only numbers in the Student Number field and only text in all other fields

Do not use single or double quotes or apostrophes in student demographics. For example, do not use quotation marks for abbreviations for feet and inches, or in names such as O'Reily. For student height, use ft and in as the abbreviations.

Because student names and numbers must already be in Health, importing overwrites the matching records with the imported information without further warning. The import does not add demographic records to your Health database.

- Enclose the fields in double quotes following the template below:

```
"StudentNumber","LastName","MedicareNumber","Height","Weight",  
"MedicalAlertCondition","MedicalAlertComments"carriage return
```

For example:

```
"12345","Latimer","123456789","5 ft 11 in","185 lbs","This Student has  
Diabetes","Hospital of Preference : Surrey"↵
```

## Immunization Records File Template

To import immunization records, you must meet all the following criteria:

- Make sure student last names, student numbers, and immunization titles are already in Health
- Name the file `c:\Import_Immunizations.txt`
- Type only numbers in the Student Number field and only text in all other fields
- Enclose the fields in double quotes following the template below:

The following is the template for immunization records:

```
"StudentNumber","LastName","ImmunizationTitle","ImmunizationDose",  
"DateofImmunization","ImmunizationAction","ImmunizationReaction",  
"ImmunizationNotes"carriage return
```

For example:

```
"12345","Latimer","Hep A","Dose 1","7/25/99","Administered","Rashes",  
"Assigned during Batch Update"↵
```

## Health Condition Records File Template

To import condition records, you must meet all the following criteria:

- Name the file c:\Import\_Conditions.txt
- Make sure student last names, student numbers, condition descriptions, and condition levels are already in Health
- Type only numbers in the Student Number field, and only text in all other fields
- Enclose the fields in double quotes following the template below

The following is the template for condition records:

```
"StudentNumber","LastName","ConditionDescription",  
ConditionLevelDescription,"DateRecorded","1stCommentText",  
"2ndCommentText","3rdCommentText","4thCommentText",  
"Nurse's Comments"carriage return
```

For example:

```
"12345","Latimer","Asthma",Severe,"25/07/99","P.E. Exempt","Avoid  
grasses, pollen","Call Doctor","N/A","Uses Inhaler"↵
```

## Examination Records File Template

To import examination records, you must meet all the following criteria:

- Name the file c:\Import\_Examinations.txt
- Make sure student last names, student numbers, examination titles, examination statuses, examination categories, and examination codes are already in Health
- Type only numbers in the Student Number and Age at time of exam fields, and only text in all other fields
- Enclose the fields in double quotes following the template below

The following is the template for examination records:

```
"StudentNumber","LastName",ExamRecordIndex,"ExamDate",  
Age at time of exam,"Grade at time of exam","ExamTitle","ExamStatus",  
"CategoryTitle","ExamCodeTitle"."ExamComment"carriage return
```

For example:

```
"12345","Latimer",1,"28/07/99",15,"09","Physical Examination","Good",  
"Heart"," ","Involved in active sports"
```

```
"12345","Latimer",1,"28/07/99",15,"09","Physical Examination","Good",  
Lungs,"Clear","Starting to smoke"
```

```
"12345","Latimer",1,"28/07/99",15,"09","Physical Examination","Good",  
"Blood Pressure","180"," "↵
```

# Exporting Data

You can export Health data to other software, such as Excel, to create your own reports.

If you are exporting from one Health database to be imported into another Health database, the versions of Health must be the same. For reliable results, use one of the templates supplied with Health.

Each template can contain one or more sets of filter criteria. For better results, use a pre-defined template.

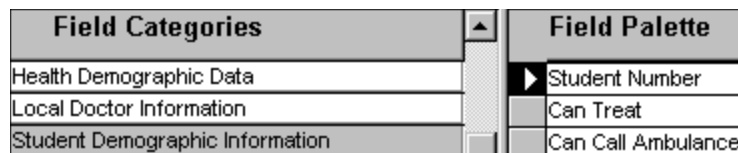
For full details on the format of exported files, see “Appendix C: Exporting Files from Health” on page 84.

## Creating an ASCII File

You can export Health data as an ASCII file. To ensure successful import and export of ASCII files, do not use apostrophes, single- or double-quotes as abbreviation for feet and inches.

### TO CREATE AN ASCII FILE TEMPLATE:

- 1 From the File menu, choose Export Data, then choose ASCII Transfer.
- 2 Click New Template.
- 3 Type the name of your template, then click the type of Health information you want to include: Immunizations, Examinations, Conditions, or Demographics.
- 4 Select a field category, select a field palette, then click Add.



- 5 If you want, select additional field categories and field palettes, clicking Add after each selection.

You must include the Student Number field in your template.

	Template Fields	Type	Size
1	Student Number	Text	15
2	Firstname	Text	50
3	Surname	Text	50

- 6 Click Save Template, type any notes you want, then click Save.

The template is automatically saved in the Health Datafiles folder.

Template Name :	Sept99
Template Type :	Immunizations
Notes :	doctor and contact information
Created By :	DBAdmin
Date :	19-Aug-99

- 7 Click OK.
- 8 Click Load Template, select the appropriate template, then click Load Template again.

**TO CHOOSE WHICH RECORDS APPEAR IN THE TEMPLATE:**

- 1 To constrain your output to a particular subset of records, click Filter Criteria.
- 2 Select a field category, then select field palettes, and click Add.
- 3 Type the criteria. Either place double quotes or no quotes around text fields – you cannot use single quotes.
- 4 Click Save Template, type a name and any notes you want, then click Save, and click OK.
- 5 To preview the data file, click View Subset.
- 6 To close the view, click the Close box.

**TO EXPORT AN ASCII FILE:**

- 1 From the File menu, choose Export Data, then choose ASCII Transfer.
- 2 If you have a template you want to use, click Load Template, then select the template and click Load Template.
- 3 Click ASCII Export.
- 4 A dialog shows you the name and location of the ASCII file. Click OK.
- 5 Close the window.

## Exporting to dBase

**TO EXPORT TO DBASE:**

- 1 From the File menu, choose Export Data, then choose Export dBase (.dbf).
- 2 A dialog shows you the location of the exported file(s). Click OK.

## Exporting to Access

Exporting to Access creates the HealthExport.mdb database with six tables:

- LDOIN\_LocalDoctorInformationExport
- DEIN\_DentistInformationExport
- HDDA\_HealthDemographicDataExport
- IMDA\_ImmunizationDataExport
- EXRE\_ExaminationRecordsExport
- HCOD\_HealthConditionsExport

### TO EXPORT TO ACCESS:

- 1 From the File menu, choose Export Data, then choose Export Access (.mdb).
- 2 A dialog shows you the name and location of the exported file. Click OK.  
To use the database, import it into Access.

### TO USE THE ACCESS DATABASE:

- 1 Launch Access and create a blank Access database.
- 2 From the Access main menu, choose File, then choose Get External Data, and choose Import.
- 3 Select the HealthExport.mdb database and click Import.
- 4 There are six tables as listed above. Click Select All, then click OK.

## Exporting to Excel

### TO EXPORT TO EXCEL:

- 1 From the File menu, choose Export Data, then choose Export Excel (.xls).
- 2 A dialog shows you the name and location of the exported file. Click OK.

## Archiving Data

At the start of the school year, you might want to create a file you can use throughout the year to archive student records.

At the end of the school year, you might want to generate reports or export data. Also, create an archive of the records you have flagged for archive.

Archiving is a one-way process. Once records are archived, you can view but cannot edit those records again. You cannot bring records back from an archive.

## Creating an Archive File

At the start of the school year, create a file you can use throughout the year to archive student records.

If you use Health in multi-user mode, you must create the archive file on a network drive that all users can access. If you archive students onto a local drive, then other users would only be able to see the name of the archive file, but would not be able to read the information in it.

Student records are flagged for archive when they have been deleted from Win School. When you update the Health database with Win School data, a red asterisk appears beside those records that have been flagged for archive.

student record is  
flagged for archive →

	Number	Student Name
*	029108	Abaloff, Anna-Marie Lee
	070329	Allen, Rob Darren

### TO CREATE AN ARCHIVE FILE:

- 1 From the View menu, choose Archive Contents.
- 2 Click New Archive.
- 3 In the Filename field, type the name of the archive.
- 4 In the Notes field, type any details you want.

Load Archive	Delete Archive	<< Back	Add	Filename	Spring 2000
				Notes	Jan 4 through Mar 31

- 5 Click Add to create the archive database.
- 6 In the dialog reporting your archive was successfully created, click OK.

In the Archive File Management dialog, the archive file information appears.

Archive File	Created	Notes
3 Spring 2000	12/01/99 9:48:49 DBAdmin	Jan 4 through Mar 31

Load Archive	Delete Archive	New Archive
Spring 2000		

- 7 Click OK to close the Archive File Management dialog.

## Archiving Records

To archive records, you must be the only user connected to the database and records must be flagged for archive. Records are flagged when they have been removed from the Win School database.

### TO ARCHIVE RECORDS:

- 1 From the File menu, choose Archive Student Information.
- 2 In the Archive File Management dialog, select the archive file to which you want to save the records, then click Archive Records.

	Archive File	Created	Notes
12	Fall1999	10/04/99 14:41:17 DBAdmin	Sept 7 to Dec 31



- 3 In the dialog that appears, click OK.
- 4 In the message that appears, click Yes.
- 5 Click OK to close the Archive File Management dialog.

## Viewing Archive Files

Display archive records to view student records that have been removed from the Win School database.

The Health Module Archive window shows you demographic, doctor and dentist, contact, general medical, immunization record, condition record, and examination record information. All of the information you entered in Health appears in the archive file.

### TO VIEW AN ARCHIVE FILE:

- 1 From the View menu, select Archive Contents.

- 2 Select the archive file, then click Load Archive to display the archive file. The Health Module Archives window opens.

The screenshot shows a software window titled "Current Archive File : Spring 2000". At the top left is a "Print Report" button with a printer icon. At the top right is a "Done" button with a blue arrow icon. Below the title bar is a table with the following data:

Student #	Name	Gender	Archive Date
20046085	Pan, Peter William	Male	23-Jun-00
20046086	Kurtis, Kelly	Female	23-Jun-00

Below the table is a tabbed interface with the following tabs: Demographic Info (selected), Doctor/Dentist Info, Contact Info, General Medical Info, Immunization Records, Health Condition Records, and Examination Records. The "Demographic Info" tab is active, showing the following information for student 1730 Kurtis, Kelly:

1730 Kurtis, Kelly

Phone :	<input type="text"/>	Gender :	<input type="text" value="Female"/>
Address :	<input type="text"/>	Birth Date:	<input type="text" value="N/A"/>
City :	<input type="text" value="N/A"/>	Ethnic Category:	<input type="text" value="N/A"/>
State / Zip:	<input type="text"/>	Home Languages:	<input type="text" value="English"/>
Country	<input type="text" value="N/A"/> <input type="text" value="N/A"/>	Normal Program:	<input type="text" value="N/A"/>
Area / County	<input type="text" value="N/A"/>	Grade:	<input type="text" value="N/A"/>
Social Security Num :	<input type="text"/>	Homeroom Number:	<input type="text" value="N/A"/>
Medicare Number:	<input type="text"/>		

- 3 To print the archive, click Print Report, then select the appropriate radio button, and click Print.
- 4 Click Done.

## Deleting Archive Files

### TO DELETE AN ARCHIVE FILE:

- 1 From the View menu, choose Archive Contents.
- 2 In the Archive File Management dialog, select the archive file you want to delete, then click Delete Archive.
- 3 In the confirmation message that appears, click Yes.
- 4 Click OK.

# USING MEDICAL RECORDS

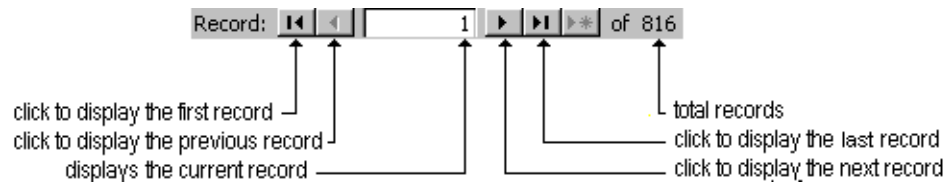
## Using the Main Window

The Main window displays the list of students imported from Win School into your Health database.

Make sure you have a schedule for regularly updating student information from Win School. This will ensure you are working with the latest information.

## Navigating the Main Window

You can see the total number of student records at the bottom of the Main window.



There are several different ways to move around the student list.

To	Do
move up and down the list	use the scroll bar
go to the last record	click the right-most arrow
go to the first record	click the left-most arrow
go to the next record	click the Right arrow or press the Down arrow
go to the previous record	click the Left arrow or press the Up arrow
go to a record number	type the record number in the current record text box and press Enter

## Viewing and Selecting Student Records

To view one record, double-click that student record in the Main window.

To display several student records one after another, select those records first. You must select a student record in the Main window, before you can use the Medical Info button or Student Medical Record from the Edit menu.

You can select one, several, or all student records in the Main window.

You might want to sort and select a group of student records, for example, when you want to assign an immunization.

Use the following ways to select student records:

- In the Main window, click the checkboxes in the Select column to select records.
- In the Select column, click the checkbox of the first record, then shift-click the checkbox of the last record to select all records in between.
- Click the Select column heading to select or deselect all student records.
- Select one checkbox, then press Return to select or deselect subsequent records (the first record is deselected.)

**TO VIEW ONE STUDENT RECORD:**

- In the Main window, double-click the record.

**TO VIEW A SERIES OF STUDENT RECORDS:**

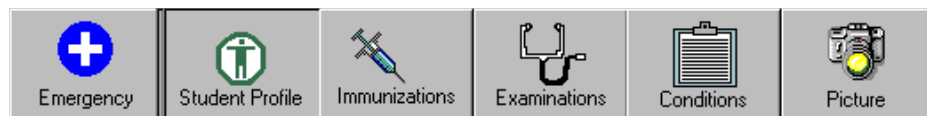
- 1 In the Main window, click the checkboxes in the Select column to select records.
- 2 Click Medical Info.



OR

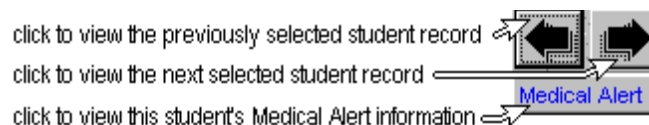
From the Edit menu, choose Student Medical Record.

- 3 The student's medical record opens showing the Student Profile by default. To display the student's emergency information, immunizations, examinations, conditions, or picture, click the appropriate button.



- 4 To view the next or previous record, click the left or right pointing button.

In the Student Profile view, the Medical Alert is displayed at the bottom. In the Immunizations, Examinations, and Conditions view, a Medical Alert button appears under the Next and Previous buttons for students who have medical alert information. Click the Medical Alert button to display the Medical Alert for that student.



- 5 When you've finished, click OK.

## Zooming into Fields

You can zoom into fields to display the field contents in a larger window.

### TO ZOOM INTO A FIELD:

- Click in the field and press Shift-F2. If the field is modifiable, type the text in the dialog, then click OK.

## Sorting Student Records

Sorting lets you arrange student records into groups. You can sort the Health database on any column in the Main window.

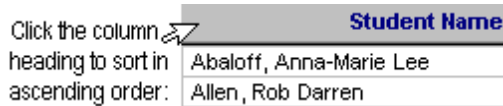
For example, you might be conducting eye and vision screening programs for all Grade 9 students. To group Grade 9 students, click the Curr Grade column heading to sort that column. Scroll to display records with 09 in the Curr Grade column.

Inactive student records are always sorted to the bottom of the list.

### TO SORT COLUMNS:

- 1 Click a column heading in the Main window (except the Select column) to sort that column in ascending order.

The column heading changes to navy blue to indicate that the Main window is sorted on that column.



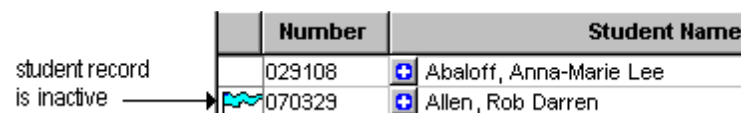
- 2 Click the sorted column heading again to sort that column in descending order.

## Viewing Inactive Student Records

A flag indicates student records that are no longer active in Win School.

A student record is inactive when that student is not currently enrolled; either the student has withdrawn, or the student entry date has not yet arrived.

It is important to know which student records are inactive, such as when administering immunizations.



	Number	Student Name
student record	029108	Abaloff, Anna-Marie Lee
is inactive →	070329	Allen, Rob Darren

When you sort the database, inactive student records are always sorted to the bottom by default.

## Viewing Records Marked for Archive

When student records are removed from Win School, a red asterisk appears in the column to the left of the student number after you run WS Update. For example, a student might have transferred to a different school district.

student record is flagged for archive →

	Number	Student Name
*	029108	Abaloff, Anna-Marie Lee
	070329	Allen, Rob Darren

When you archive data, student records with a red asterisk are removed from the Health database and saved in an archive file.

## Viewing Emergency Information

Use the Emergency Information window to quickly access critical health information.

The Emergency Information window contains display-only information on the following four tabs:

<b>Demographics</b>	personal information, including the student's address and phone number
<b>Doctor Info</b>	doctor and dentist's name, address, and phone number
<b>Medical Info</b>	health conditions, medical alerts, and comments
<b>Contact Info</b>	name, relationship with student, address, and phone number of up to 4 contacts and up to 2 emergency contacts

### TO DISPLAY EMERGENCY INFORMATION:

- 1 In the Main window, click the Emergency icon.



OR

From the View menu, choose Emergency Information.

OR

In the Student Medical Record, click Emergency.



- 2 Click a tab to display the information for that tab.

You cannot change information in the Emergency Information window.

- 3 To display medical alerts, click the Medical Info tab.
- 4 When you have finished viewing the information, click Close.

## Working with Student Medical Records

A student's medical record gives you an overview of the student's medical health information.

In a student's medical record, you can:

- view emergency information
- view and override provisional enrollment status
- view and update doctor and dentist information

If you have elected to maintain doctor information in Win School, you must edit doctor information in Win School.

- view and update health profile
- view Win School legal and medical alert
- view and update Health module medical alert
- view and update immunizations, including exemptions
- view and update examinations
- view and update conditions
- view student picture

### TO DISPLAY MEDICAL RECORDS:

- 1 If you want to use the Next and Previous buttons to display a series of medical records, select the students in the Main window.
- 2 Click Medical Info.



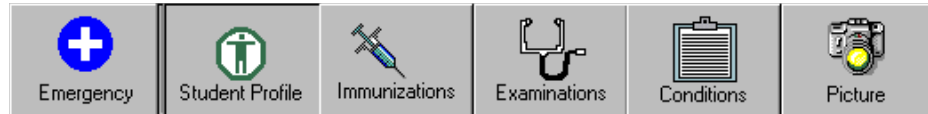
OR

From the Edit menu, choose Student Medical Record.

OR

Double-click a student name.

- 3 The student’s medical record opens in the Student Profile view by default, showing:
- doctor or dentist information on the left
  - student health profile on the right
  - medical and legal alerts on the bottom



The following table shows what you can do in the student medical record.

To	Click
View Emergency information	Emergency
Work with dentist information	the doctor information popup menu and select dentist information.
Work with immunizations	Immunizations
Work with examinations	Examinations
Work with conditions	Conditions
View student picture	Picture

If you have selected students in the Main window, use the Next and Previous buttons to display selected students’ records.



- 4 When you’ve finished, click OK.

## Maintaining Student Profiles

You can maintain health related information in the Student Profile, including:

- Doctor Information (if you chose to maintain it in Health and not Win School)
- Dentist Information
- Student Height, Weight, Immunization Status, and Provisional Enrollment status
- Health module Medical Alert and comments

Some information in the Student Profile is maintained in Win School and can be viewed but not changed in Health, including:

- Doctor Information (if you chose to maintain it in Win School and not Health)
- Student Disability
- Call Ambulance
- Call Doctor
- Can Treat
- Legal Alert
- Win School Medical Alert and comments

For more information on which fields are maintained in which application, see “Differences Between Health and Win School” on page 33.

## Maintaining Doctor and Dentist Information

You can maintain doctor information either in Win School or locally in Health. You select this when you set up Health in “Setting Up Doctor Information Source” on page 12.

If you maintain doctor information in Win School, that information is updated in Health when you choose Update from Win School Database from the File menu or click WS Update. For information on maintaining student information in Win School, see the Win School Details Guide.

If you maintain doctor information in Health, you enter and maintain both doctor and dentist information in Student Profile.

### TO MAINTAIN DOCTOR AND DENTIST INFORMATION:

- 1 If you want to work with a series of records, select the students in the Main window.
- 2 Click Medical Info.



OR

From the Edit menu, choose Student Medical Record.

- 3 In the Student Profile, enter that student’s doctor information.
- 4 To maintain dentist information, click the popup menu in the top left and select Dentist Information. Enter that student’s dentist information.

- 5 Use the Next and Previous arrows beside the student name to move to different records.
- 6 When you have finished maintaining doctor and dentist information, click OK.

## Maintaining Student Health Information

You can maintain student height, weight, immunization status, and provisional enrollment status in the Other Information area in the Student Profile.

Provisional Enrollment status is automatically calculated based on the immunization requirements you have set up.

### Overriding Provisional Enrollment Status

In the Student Profile, you can override a student's Provisional Enrollment status. For example, if a student received an immunization dose just before the required date, or you are sure a student has received all required immunizations but does not have the documentation and the dates, you might want to override that student's Provisional Enrollment status.

Manually overriding a student's Provisional Enrollment status has two effects:

- The student's Provisional Enrollment status remains on Override until you manually change it.
- The student's Provisional Enrollment status is not automatically updated, that is, Health no longer checks that student's Provisional Enrollment status based on immunization requirements.

#### TO MAINTAIN STUDENT HEALTH INFORMATION:

- 1 If you want to work with a series of records, select the students in the Main window.
- 2 Click Medical Info.



OR

From the Edit menu, choose Student Medical Record.

- 3 In the Student Profile, enter that student's health information in the Other Information area, including:
  - Medicare number
  - height and weight

- if the student is exempted from immunizations, select a reason from the Immunization Status popup menu
- to override a student's Provisional Enrollment status, select the Override checkbox, then you can change the Provisionally Enrolled checkbox and the Provisionally Enrolled Date.

The other fields are maintained in Win School.

- 4 Use the Next and Previous arrows beside the student name to move to different records. When you've finished, click OK.

## Entering Health Module Medical Alerts

The Medical Alert area shows two medical alert conditions: one you enter and update in Health; the other is imported from Win School.

Win School medical alerts and comments are maintained in Win School.

Students who have medical alerts have a medical alert flag in the Main window. You can sort by the Medical Alert column to quickly see which students have medical alerts.

Medical alert flag →

!	Number	
!	194	+ STU
!	592	+ STU

### TO ENTER MEDICAL ALERTS:

- 1 If you want to work with a series of records, select the students in the Main window.
- 2 Click Medical Info.



OR

From the Edit menu, choose Student Medical Record.

- 3 Type the information in the Health Module Medical Alert fields.

Medical Alert	
<b>Health Module Medical Alert Condition</b>	<b>Health Module Medical Alert Comments</b>
Allergies: bee stings, seafood, peanuts, and cats	Reaction: swells up, hives, and finds it difficult to breath Treatment: Adrenalin injection or Caladryl cream
<b>Win School Medical Alert Condition</b>	<b>Win School Medical Alert Comments</b>
Asthma, Severe	requires inhaler and breathing machine

- 4 Use the Next and Previous arrows beside the student name to move to different records. When you've finished, click OK.

## Viewing Medical Alerts

The Medical Information window lists medical alerts for students who have crucial health information entered in Health or Win School.

### TO DISPLAY MEDICAL ALERTS IN THE STUDENT PROFILE VIEW:

- Double-click a student record.

The Student Profile opens.

The Win School and Health medical alerts, comments, and conditions appear at the bottom.

The Win School legal alert also appears.

### TO DISPLAY MEDICAL ALERTS IN THE IMMUNIZATIONS, EXAMINATIONS, OR CONDITIONS VIEW:

- 1 If you want to work with a series of records, select the students in the Main window.
- 2 Click Medical Info.



OR

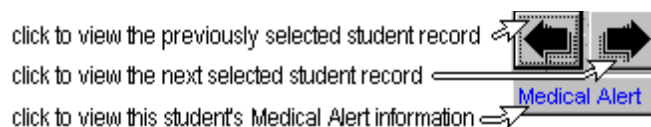
From the Edit menu, choose Student Medical Record.

OR

Double-click a student record.

- 3 Click Immunizations, Examinations, or Conditions.

For those students who have crucial medical information, a Medical Alert button appears.



- 4 Click Medical Alert to display the Win School and Health medical alerts, comments, and conditions.
- 5 Click Close.

## Viewing Student Pictures

You might want to open the student's picture to make sure the student record you are accessing belongs to the student in your office.

### TO DISPLAY A STUDENT PICTURE:

- 1 In the Main window, select a student and click Picture.



OR

From the View menu, choose Student Picture.

OR

In the Student Medical Record, click Picture.

- 2 When you have finished viewing the picture, click Close.

# ADMINISTERING IMMUNIZATIONS

## Assigning an Immunization to Many Students

You can pre-assign all required immunizations to each group of students with blank dates and an Action of N/A. Then you can easily see which students need which immunizations. See “Assigning Required Immunizations to Students (Batch Assign)” on page 27.

Batch assigning an immunization to many students is useful when many students receive the same dose on the same day.

When you administer an immunization, specify the date and select Administered for the Action. Health overwrites the immunization and dose of the same name with the new date and action.

### TO BATCH ASSIGN A DOSE TO SEVERAL STUDENTS:

- 1 If you want, sort the students by clicking the column heading in the Main window.
- 2 Select the students to be assigned an immunization dose.
- 3 Click Batch Assign. Then click Immunizations.



OR

From the Edit menu, select Batch Assign Immunization.

- 4 From the popup menus, select the Immunization and Dose.
- 5 From the Action popup menu, choose Administered.
- 6 In the Date field, type the immunization date.
- 7 If you want, select the “Don’t add immunization if it’s already assigned with this date” checkbox.

If you select this checkbox, students with the identical Immunization, Dose, Action, and Date will be skipped.

Whether you select this checkbox or not, if existing students have the identical Immunization and Dose with an Action of N/A and an empty Date, Health replaces those records with the new immunization data.

Immunization Batch Assignments - Health Module

Select the Immunization you want to assign to selected students :

Immunization : Polio

Dose : Polio Dose 1

Action : Administered

Date : 05-Sep-00

Comments :

Options

Don't add immunization if it's already assigned with this date

Assign Done

- 8 Click Assign to begin assigning the immunization to the selected students.
- 9 A dialog shows how many students will be assigned that immunization dose. Click Yes to accept the batch assign.

## Assigning an Immunization to One Student

If you need to assign immunizations to one student, use the student's medical record. For example, if you have a form showing a student's immunization history and you need to enter this student's immunizations into his record.

See "Viewing or Updating Student Immunizations" in the next section.

# Viewing or Updating Student Immunizations

In student medical records, you can view and update immunizations.

## TO VIEW OR UPDATE IMMUNIZATIONS IN MEDICAL RECORDS:

- 1 If you want to work with a series of records, select the students in the Main window.
- 2 Click Medical Info.



OR

From the Edit menu, choose Student Medical Record.

OR

Double-click a student record.

- 3 The student's medical record opens showing the Student Profile by default. Click Immunizations.

If that student has a medical alert, a Medical Alert button appears under the Next and Previous arrows.

To change the Date, Action, or Reaction of an immunization, make changes in the appropriate column.

OR

Select an immunization, click Edit, make changes, and click OK.

OR

Double-click an immunization, make changes, and click OK.

To add an immunization, click Add, specify the details, and click Assign.

To delete an immunization, select that immunization and click Delete. If you've deleted an immunization by mistake, click Restore.

- 4 If you have selected multiple students, click the Next arrow to view the next student's immunizations.
- 5 When you've finished working with immunizations, click OK.

## Selecting Report Options

In the Immunization History and Immunization Summary report, you can select options to report only students in specific categories.

The following table shows which students will appear in which report selection. One category does not supersede another, that is, all categories are of equal priority.

Students in Category	Category						
	Fully Compliant	Administered	Exempt	Provisionally Enrolled and not Delinquent	Delinquent	Non-compliant	Incomplete
Dose is administered, meeting all its requirements	✓	✓					
Dose is exempted, meeting all its requirements	✓		✓				✓ (except military exemption)
Dose is administered, even though it is not required	✓	✓					
Dose is exempted, even though it is not required	✓		✓				
Dose is neither administered nor exempted, and is violating its requirements, and is still within the provisional enrollment period				✓		✓	✓
Dose is neither administered nor exempted, and is violating its requirements, and is past the provisional enrollment period					✓	✓	✓
Dose is administered and is violating its requirements, and is still within the provisional enrollment period		✓		✓		✓	✓
Dose is administered and is violating its requirements, and is past the provisional enrollment period		✓			✓	✓	✓
Dose is exempted and is violating its requirements, and is still within the provisional enrollment period			✓	✓		✓	✓
Dose is exempted and is violating its requirements, and is past the provisional enrollment period			✓		✓	✓	✓

## Viewing Immunization History

The Immunization History report lists students' immunization history, including students who are exempted from immunizations.

You can use this report to list students who are provisionally enrolled on the day you run the report, or specify a date to forecast which students will be provisionally enrolled at a future date.

Use this report to view or print the immunization history of individual students. You can run this report for selected students or a selected population to get a snapshot of their immunizations.

To produce a report, you must select at least one immunization in the Immunizations tab, and at least one option in “Include the following students” in the Students tab. All other options are optional. The report is run based on all the options you select.

The following examples show using the forecast date to produce reports based on selections in the Immunizations and Students tabs.

Selections in Immunizations tab	Selections in Students tab	Report shows
One immunization	<ul style="list-style-type: none"> <li>Run report using forecast date</li> </ul>	Both provisionally enrolled students and not provisionally enrolled students for that immunization on the forecast date
One immunization	<ul style="list-style-type: none"> <li>Provisionally enrolled students only</li> <li>Run report using forecast date</li> </ul>	Only provisionally enrolled students for that immunization on the forecast date
Several immunizations	<ul style="list-style-type: none"> <li>Run report using forecast date</li> </ul>	Both provisionally enrolled students and not provisionally enrolled students for selected immunizations on the forecast date
All immunizations	<ul style="list-style-type: none"> <li>Provisionally enrolled students only</li> <li>Run report using forecast date</li> </ul>	Only provisionally enrolled students for all immunization on the forecast date

Consider carefully what you want to report on. Running this report for a large number of students might take a long time and generate a huge report, for example, running this report for the entire school might an hour or more and produce a thousand-page report.

### TO VIEW OR PRINT THE IMMUNIZATION HISTORY REPORT:

- 1 If you want to run a report on selected students, select them in the Main window.

You must select the student(s) to be included in the report. You can specify one of the following options:

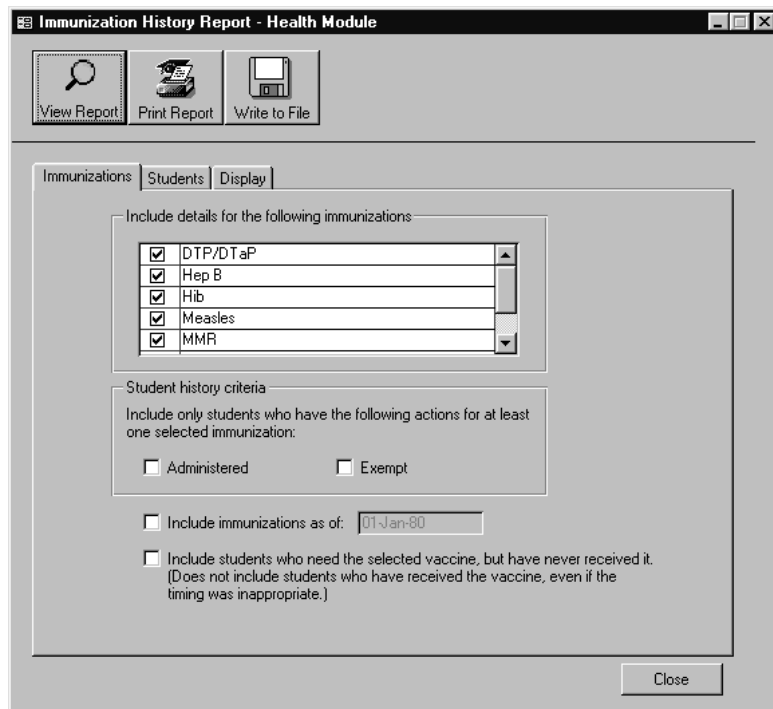
- selected students in the Main window
  - selected student population in the Students tab
  - all populations in the Students tab
- 2** Click Reports and choose Immunization History.



OR

From the Reports menu, choose Immunization History.

- 3** The Immunization History Report dialog displays the Immunizations tab by default. Select one or more immunizations.



Select	To show
Administered	Students who have received any of the selected immunization(s).
Exempt	Students who are exempt for any reason from any selected immunization(s).
Neither Administered nor Exempt	Students who are not exempt for any reason, including students with required immunizations even if the immunization has not been assigned to them.

Select	To show
Both Administered and Exempt	Students who either have any of the selected immunization(s) assigned to them, or are exempt from any of the selected immunization(s).
Include immunizations as of	Students who have received the selected immunizations on or after the specified date.
Include students who need the selected vaccine, but have never received it	Students who require the selected immunization, but do not have it assigned to them, or assigned with an Action of N/A. For this option, you can select only 1 immunization. This option is different from selecting provisionally enrolled students. If you want to report on provisionally enrolled students, see step 4 below.

- 4 Click the Students tab and select the students to be included in the report.

To list only the students who are provisionally enrolled, select “Provisionally enrolled students only”. This lists *only* provisionally enrolled students.

To include students who are forecasted to be provisionally enrolled, type a future date in “Run report using forecast date”. This lists *both* provisionally enrolled and non-provisionally enrolled students on the forecast date.

To list only students who will be provisionally enrolled on the forecasted date, select “Provisionally enrolled students only” and type a date in “Run report using forecast date”.

- 5 Click the Display tab and select display options.

Select “Include comments (landscape format)” to view or print comments on your report. For increased readability in this format, you can resize the report onscreen.



**6** To display the report, click View Report at the top.

To print the report, click Print Report.

To save the report as a file, click Write to File. Then specify the file format, name, and location.

**7** When you have finished running the report, click Close.

In the Immunization History report, the Age column shows one of the following:

- if the student has received the dose and has met all immunization requirements, the Age column shows the student’s age (immunization date - birthdate)
- if the student did not receive the dose, the column shows N/A
- if the student’s birthdate is blank, the column shows N/A
- if the student’s birthdate is later than the immunization date, the column shows INV

## Viewing Immunization Summary

Use the Immunization Summary Report to print or view:

- totals by dose for any single population
- totals by dose for all combined populations
- totals by immunization title for any single population
- totals by immunization title for all combined populations.

At the immunization title level, users can view or print the following totals:

- total number fully compliant (includes exempt and up-to-date)
- total number of medical exemptions
- total number of religious exemptions
- total number of parental exemptions
- total number of illness exemptions
- total number of military exemptions
- total number provisionally enrolled
- total number delinquent
- total number noncompliant (includes provisionally enrolled and delinquent)
- total number incomplete (includes provisionally enrolled, delinquent, and exempted from required immunizations)

You can calculate all totals, at both the dose and immunization title levels, for a selected population or for all populations.

### Understanding the Report Totals

At the immunization title level, the totals for fully compliant include all students who are up-to-date on all administrations. That is, students who require and have received an immunization, require and are exempt from an immunization, or don't require an immunization.

At the immunization title level, Health accumulates totals for exemptions by counting a single student once if that student received one or more exemptions for an immunization title.

Fully compliant students who are assigned or administered a dose that is **not** part of their requirements are still considered fully compliant. The following cases are considered fully compliant:

- a dose is not required, but is assigned and administered
- a dose is not required, but is assigned and medically exempted
- a dose is not required, and is not assigned

As this example shows, totals for the immunization title level appear on the report before the totals for individual doses.

<b>Immunization Summary Report</b>	
Population:	<b>Year: 7</b>
Immunization Title:	<b>Polio</b>
<b>Dose:</b>	<b>All Doses</b>
<b>Fully compliant:</b>	<b>3</b>
<b>Medical Exemption:</b>	<b>1</b>
<b>Religious Exemption:</b>	<b>1</b>
<b>Parental Exemption:</b>	<b>0</b>
<b>Illness Exemption:</b>	<b>2</b>
<b>Military Exemption:</b>	<b>1</b>
<b>Provisionally Enrolled and Not Delinquent:</b>	<b>0</b>
<b>Delinquent:</b>	<b>2</b>
<b>Noncompliant:</b>	<b>2</b>
<b>Incomplete:</b>	<b>3</b>
<b>Dose:</b>	<b>Polio Dose 1</b>
Administered:	3
Medical Exemption:	0
Religious Exemption:	1
Parental Exemption:	0
Illness Exemption:	0
Military Exemption:	0
Provisionally Enrolled and Not Delinquent:	0
Delinquent:	1
Noncompliant:	1
Incomplete:	2

The following table shows how Health calculates totals for this report, both at the immunization title level, and at the individual dose level.

<b>Totals on the Immunization Title for the selected population:</b>	
Fully Compliant	<p>The number of students in the selected population who have satisfied all requirements for all doses for this immunization. This includes the following students:</p> <ul style="list-style-type: none"> <li>students who need certain doses in a specific time period and have received all doses in that time period, or have been exempted from them</li> <li>students who do not need the dose, regardless of whether they received it or not</li> </ul> <p>All students are either fully compliant or noncompliant for an immunization, that is, if you add the total of fully compliant and noncompliant, you will get the total number of students in that population.</p>
Medical Exemption	<p>The number of students in the selected population who have medical exemption from receiving at least one of the current immunization doses. If a student has a medical exemption for more than one of this immunization's doses, he is counted only once in this total.</p>

Religious Exemption	The number of students in the selected population who have religious exemption from receiving at least one of the current immunization doses. If a student has a religious exemption for more than one of this immunization's doses, he is counted only once in this total.
Parental Exemption	The number of students in the selected population who have parental exemption from receiving at least one of the current immunization doses. If a student has a parental exemption for more than one of this immunization's doses, he is counted only once in this total.
Illness Exemption	The number of students in the selected population who have illness exemption from receiving at least one of the current immunization doses. If a student has a illness exemption for more than one of this immunization's doses, he is counted only once in this total.
Military Exemption	The number of students in the selected population who have military exemption from receiving at least one of the current immunization doses. If a student has a military exemption for more than one of this immunization's doses, he is counted only once in this total.
Provisionally Enrolled and Not Delinquent	The number of students in the selected population who have violated at least one of the immunization's dose requirements, but are still within their grace period for all of the dose violations.
Delinquent	The number of students in the selected population who have violated at least one of the immunization's dose requirements, and are past their grace period for at least one of these dose violations.
Noncompliant	The number of students in the selected population who have violated at least one of the immunization's dose requirements, regardless of the grace period. This is the total of students who are provisionally enrolled, plus those who are delinquent.
Incomplete	The number of students in the selected population who have violated at least one of the immunization's dose requirements, regardless of the grace period, plus students who have medical, religious, parental, or illness exemption from at least one dose with a requirement. <b>This does not include military exemption.</b> This is not a straight total of noncompliant plus all exemptions except military exemption. This is because a student may have a medical exemption for dose 1 and a religious exemption for dose 2.
<b>For a specific dose in a specific immunization for the selected population:</b>	
Administered	The number of students in the selected population who have the selected immunization dose administered at least once; regardless of whether it satisfies the immunization requirements or not. Students who receive the same dose more than once are counted only once.
Medical Exemption	The number of students in the selected population who have medical exemption from getting this immunization dose. Students who are exempted from the same dose more than once are counted only once.
Religious Exemption	The number of students in the selected population who have religious exemption from getting this immunization dose. Students who are exempted from the same dose more than once are counted only once.
Parental Exemption	The number of students in the selected population who have parental exemption from getting this immunization dose. Students who are exempted from the same dose more than once are counted only once.

Illness Exemption	The number of students in the selected population who have illness exemption from getting this immunization dose. Students who are exempted from the same dose more than once are counted only once.
Military Exemption	The number of students in the selected population who have military exemption from getting this immunization dose. Students who are exempted from the same dose more than once are counted only once.
Provisionally Enrolled and Not Delinquent	The number of students in the selected population who have not satisfied the immunization dose requirements, but are still within their grace period.
Delinquent	The number of students in the selected population who have not satisfied the immunization dose requirements, and are past their grace period.
Noncompliant	The number of students in the selected population who have not satisfied the immunization dose requirements, regardless of the grace period. This is the total of students who are provisionally enrolled, plus those who are delinquent.
Incomplete	The number of students in the selected population who have not satisfied the immunization dose requirements, regardless of the grace period, plus students who have medical, religious, parental, or illness exemptions. This is the total of noncompliant, medical exemption, religious exemption, parental exemption, and illness exemptions. <b>This does not include military exemption.</b>

Health calculates totals for all populations using the same criteria above, both at the immunization title level and the individual dose level. Health adds the totals of all defined populations to produce the total for all populations.

**TO VIEW OR PRINT THE IMMUNIZATION SUMMARY REPORT:**

- 1 Click Reports and choose Immunization Summary.

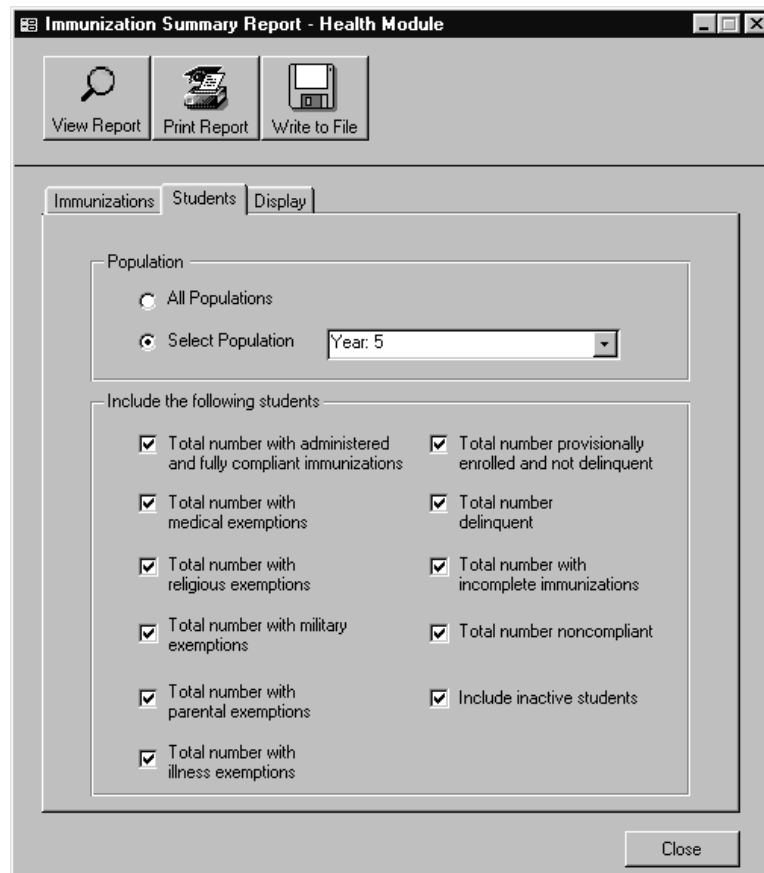


OR

From the Reports menu, choose Immunization Summary.

- 2 The Immunization Summary Report dialog displays the Immunizations tab by default. Select the immunization(s) you want.
- 3 Click the Students tab and select the student population for the report.

To show a summary of all population totals, select “All Populations” in the Students tab. This shows all doses and all populations.



Select	To show
Total number with administered and fully compliant immunizations	Students who have received all required immunizations.
Exemptions	Students who are exempt for the specified reason.
Provisionally enrolled & Not delinquent	Students who have not received a dose by the required date and are still within the provisional enrollment period.
Delinquent	Students who have passed the provisional enrollment period.
Noncompliant	Students who are provisionally enrolled, including delinquents.
Incomplete immunizations	Students who are delinquent, noncompliant and exempted from required immunizations.

**4** Click the Display tab and select display options.

To produce a report at the immunization level only and exclude the dose level, deselect “Include totals by dose”.

- 5 To display the report, click View Report at the top.

To print the report, click Print Report.

To save the report as a file, click Write to File. Then specify the file format, name, and location.

- 6 When you have finished running the report, click Close.

### Example One

If a student has passed the provisional enrollment period (delinquent) for dose 2 and is still within the provisional enrollment period for dose 3, that student is reported as “Delinquent” for dose 2 and “Provisionally Enrolled & not Delinquent” for dose 3.

### Example Two

If a student received a dose earlier than the required date, that student is listed first as both Administered and Provisionally Enrolled during the provisional enrollment period; then as both Administered and Delinquent after the provisional enrollment period.

This situation could happen if the provisional enrollment period is 30 days and a dose is required within the last year. A student received the dose 2 years ago. As such, the dose was received but it does not meet immunization requirements. Therefore during the 30-day provisional enrollment period, the report shows 1 Administered and 1 Provisionally Enrolled. After the 30-day provisional enrollment period, if you run the report again, it shows 1 Administered and 1 Delinquent.

# RECORDING EXAMINATIONS

## Examining a Student

In a student's medical record, you can log the examination you give to one student. You can also check the student's examinations, as well as immunizations and conditions.

If you are recording an examination given to a class or group of students, see "Assigning an Examination to Many Students" on page 72.

### TO VIEW OR UPDATE EXAMINATIONS IN MEDICAL RECORDS:

- 1 If you want to work with a series of records, select the students in the Main window.
- 2 Click Medical Info.



OR

From the Edit menu, choose Student Medical Record.

OR

Double-click a student record.

- 3 The student's medical record opens showing the Student Profile by default. Click Examinations.

If that student has a medical alert, a Medical Alert button appears under the Next and Previous arrows.

- 4 In the Sort Exams by line, click Exam to sort by examination title in alphabetical order.

Click Date to sort by date in reverse chronological order, that is, latest examination on top and oldest at the end.

- 5 To add an examination, click Add, select the examination from the popup menu, and click Assign.
- 6 Select the status from the popup menu and in the bottom part of the dialog, select the Category, Code, and type any comments.

To see the Comment field in a bigger dialog, click in the field and press Shift-F2.

- 7 If you have selected multiple students, click the Next arrow to view the next student's examinations.
- 8 When you've finished, click OK.

## Assigning an Examination to Many Students

For required examinations, the easiest way is to assign all required Examinations with blank dates to each group of students. Then when you give the examination, change the date and add comments to the students that need comments.

### Assigning Required Examinations to Students (Batch Assign)

You can assign an examination to a group of students. For example, if a class requires periodic head lice examinations, pre-assign the examinations with scheduled future dates. When an examination is given, record the results with any comments.

#### TO BATCH ASSIGN AN EXAMINATION:

- 1 If you want, sort the students by clicking the column heading in the Main window.
- 2 Select the students who are getting the examination.
- 3 Click Batch Assign. Then click Examinations.



OR

From the Edit menu, select Batch Assign Examination.

- 4 From the Examination popup menu, select the Examination.
- 5 From the popup menus, select an Exam Status and Exam Code(s).
- 6 Type the Exam Date and any Comments.
- 7 Click Assign to begin assigning the examination to the selected students.
- 8 A dialog shows how many students will be assigned that examination. Click Yes to accept the batch assign.

## Showing a List of Examinations

Use the List of Examinations report to show student's examinations.

### TO VIEW OR PRINT THE LIST OF EXAMINATIONS REPORT:

- 1 Click Reports and choose List of Examinations.



OR

From the Reports menu, choose List of Examinations.

- 2 Select the examination(s) you want to report on, and other report options.
- 3 To display the report, click View Report at the top.

To print the report, click Print Report.

To save the report as a file, click Write to File, and specify the file format, name, and location.

- 4 When you have finished running the report, click Close.

## Showing a Summary of Examinations

Use the Examination Summary report to summarize examinations for all students or students in a range of grades or ages.

Please note the following in the Examination Summary report:

- Since students usually do not have the same examination more than once a day, in the rare instance when this happens, that student will be counted more than once in this report's totals.
- Examinations with a Code or Category of N/A are not included in this report.

### TO VIEW OR PRINT THE EXAMINATION SUMMARY REPORT:

- 1 Click Reports and choose Examination Summary.



OR

From the Reports menu, choose Examination Summary.

- 2** In the Examinations tab, select the examination(s) you want to report on, and other report options.
- 3** Click the Students tab and select the students to be included in the report, and other student options.
- 4** Click the Display tab and select display options.
- 5** To display the report, click View Report at the top.

To print the report, click Print Report.

To save the report as a file, click Write to File. Then specify the file format, name, and location.

- 6** When you have finished running the report, click Close.

# RECORDING HEALTH CONDITIONS

## Viewing or Assigning Student Conditions

In student medical records, you can view and update student health conditions.

### TO VIEW OR UPDATE STUDENT HEALTH CONDITIONS IN MEDICAL RECORDS:

- 1 If you want to work with a series of records, select the students in the Main window.
- 2 Click Medical Info.



OR

From the Edit menu, choose Student Medical Record.

OR

Double-click a student record.

- 3 The student's medical record opens showing the Student Profile by default. Click Conditions.

If that student has a medical alert, a Medical Alert button appears under the Next and Previous arrows.

To add a condition, click Add, then select the condition Title and specify other details.

To change the condition Title, Level, Date, or Comment, make changes in the appropriate column.

To delete a condition, select that condition and click Delete. If you delete a condition by mistake, click Restore.

- 4 If you have selected multiple students, click the Next arrow to view the next student's condition.
- 5 When you've finished working with conditions, click OK.

# Assigning a Condition to Many Students (Batch Assign)

You can batch assign a health condition to many students at once.

## TO BATCH ASSIGN A CONDITION:

- 1 If you want, sort the students by clicking the column heading in the Main window.
- 2 Select the students who will be assigned the condition.
- 3 Click Batch Assign. Then click Health Conditions.

OR

From the Edit menu, select Batch Assign Condition.

- 4 From the popup menus, select the Condition, Level, and up to four pre-defined comments. You can also type comments in the Nurse's Comments text box.
- 5 Check that the date is correct.
- 6 Click Assign to begin assigning the condition to the selected students.
- 7 A dialog shows how many students will be assigned that condition. Click Yes to accept the batch assign.

# Listing Health Conditions

Use this report to list students' health conditions.

## TO VIEW OR PRINT THE LIST OF HEALTH CONDITIONS REPORT:

- 1 Click Reports and choose List of Health Conditions.

OR

From the Reports menu, choose List of Health Conditions.

- 2 Select the conditions and levels you want to report on, and other report options.
- 3 To display the report, click View Report at the top.

To print the report, click Print Report.

To save the report as a file, click Write to File. Then specify the file format, name, and location.

- 4 When you have finished running the report, click Close.

# GLOSSARY

Use the following list of terms to assist your understanding of Health.

## **ASCII**

American Standard Code for Information Interchange. A character set counting 94 printable characters and 34 other characters such as space, bell, shift-in, tab, and so on. Used as a format for transferring data from one computer to another.

## **At Least**

In Health, an option that means equal to or greater than a specified number.

## **Batch Assigning**

Entering a condition, immunization, or examination for a group of selected students, such as for a grade, age, or homeroom.

## **Condition**

Any type of physical or emotional incidents and circumstances that are neither examinations nor immunizations.

## **Contact**

A person who takes care of a student or who can be called in an emergency. Contacts usually include the student's parents.

## **Delinquent**

A report selection to show students who do not meet the requirements and for whom the grace period has expired.

For more information, see "Selecting Report Options" on page 59.

## **Dose**

A specific dose of an immunization, such as a booster shot or one in a series of immunization doses.

## **Examination**

Any type of review of a student's physical or emotional condition, including screenings.

## **Exemption**

A flag indicating that a student does not have to receive an immunization or an immunization dose. Exemption reasons include medical, military, illness, parental, and religious.

## **Fully Compliant**

A report selection to show students who have satisfied all the requirements for all doses for an immunization. For example, if a dose is required for the current population then the student must have had that dose administered correctly, or be exempt for it. The student does not need the dose if it is not required, and thus is fully compliant whether the student has received the dose or not.

For more information, see “Selecting Report Options” on page 59.

## **Immunization**

Any type of medication provided to students to prevent infection.

## **Import**

A feature that lets you add data records from other software into the Health database.

## **Inactive Student Record**

A student who is not currently enrolled; either the student has withdrawn or the student entry date has not yet arrived.

## **Incomplete**

A report selection to show students who are non-compliant, delinquent, and/or exempted from required immunizations. This does not include military exemption.

For more information, see “Selecting Report Options” on page 59.

## **IP Address**

A number that uniquely identifies a computer on a network. Health needs the Win School Server’s IP address to find the student and attendance information it uses.

## **Non-compliant**

A report selection to show students who are provisionally enrolled, including delinquents.

For more information, see “Selecting Report Options” on page 59.

## **Population**

A group of students. Populations can be based on a range of ages or grades.

Immunization requirements are set up for populations and some reports are based on populations.

Students must be in a population to have immunization requirements and to show up in reports.

## **Provisionally Enrolled**

Students who do not meet the immunization requirements.

Students are reported as provisionally enrolled on the day an immunization dose is overdue or on the first day of the school year, whichever is later.

Students remain provisionally enrolled until they satisfy all immunization requirements.

## **Provisional Enrollment Period**

The provisional enrollment period (in days) in which a student is reported as provisionally enrolled.

When the provisional enrollment period is passed, the Immunization Summary report shows the students as Delinquent.

## **Under**

In Health, an option that means less than the specified number.

## **Up to and Including**

In Health, an option that means less than or equal to the specified number.

## **User Account**

A user name and password that lets you access Health and secures the database against unauthorized access.

There is a default user account, with the user name and password “DBAdmin,” that is provided to the database administrator to set up user accounts. After you log on the first time, change the administrator password.

All user accounts are set up with either Read Only, Full Access, or DBA access.

## **WS Update**

A process that populates or brings Health up-to-date with information entered in Win School.

# APPENDIX A: UPDATING FIELDS FROM WIN SCHOOL TO HEALTH

When you run WS Update, Health copies these fields from Win School.

## Student Demographics

WS Update copies the following Student Demographic fields from Win School to Health.

- First Name
- Middle Name
- Surname
- Gender
- Social Security Number
- Ethnic Category
- Home Languages
- Birthdate
- Phone Number
- Mailing Address 1
- Mailing Address 2
- Mailing Address City
- Mailing Address State
- Zip Code
- Mailing Address Area
- County
- Mailing Address Country

If a student does not have a mailing address but has a physical address, WS Update copies the physical address instead of the mailing address.

## Contact Information

WS Update copies the following Contact Information fields from Win School to Health.

- Title
- First Name
- Middle Name
- Surname
- Relation
- Phone

- Address 1
- Address 2
- City
- State
- Zip Code
- Employer
- Position
- Work Phone
- Work Address 1
- Work Address 2
- Work City
- Work State
- Work Zip Code

## **Doctor Information**

WS Update copies the following Doctor Information fields from Win School to Health.

- Medical Alert
- Medical Comments

## **Doctor Information (if source is Win School)**

If you chose to maintain doctor information in Win School, WS Update copies the following additional Doctor Information fields from Win School to Health.

- Doctor Name
- Doctor Address 1
- Doctor Address 2
- Doctor City
- Doctor State
- Doctor Zip Code
- Doctor Office Phone
- Doctor Home Phone
- Legal Alert
- Disability
- Call Ambulance
- Call Doctor
- Can Treat

# APPENDIX B: IMPORTING FILES INTO HEALTH

These are the format limits of fields you can import into Health 1.3.

## Import\_Immunizations Template

Field Name	Data Type	Data Size
Student Number	Character	15
Surname	Character	50
Immunization Title Description	Character	30
Immunization Dose	Character	50
Immunization Date	Date	8
Immunization Action Description	Character	30
Immunization Reaction Description	Character	30
Immunization Note	Memo	65,535

## Import\_Examinations Template

Field Name	Data Type	Data Size
Student Number	Character	15
Surname	Character	50
Exam Record Number	Long integer	6 +
Exam Date	Date	8
Age	Integer	3 digits
Grade	Character	3
Exam Title	Character	29
Exam Status	Character	29
Exam Category	Character	29
Exam Code Description	Character	29
Exam Comment	Memo	65,535

## Import\_Conditions Template

Field Name	Data Type	Data Size
Student Number	Character	15
Surname	Character	50
Health Condition Description	Character	29
Health Condition Level	Character	29
Date Recorded	Date	8
1st Condition Comment Text	Character	255
2nd Condition Comment Text	Character	255
3rd Condition Comment Text	Character	255
4th Condition Comment Text	Character	255
Nurse's Comment	Character	65,535

## Import\_Demographics Template

Field Name	Data Type	Data Size
Student Number	Character	15
Surname	Character	50
Medicare Number	Character	39
Height	Character	15
Weight	Character	15
Medical Alert Condition	Character	255
Medical Alert Comment	Character	65,535

# APPENDIX C: EXPORTING FILES FROM HEALTH

When you export Health data to dBase, Access, or Excel, Health creates the appropriate files and fields, as listed in the following sections.

You can work with the exported Health data to run queries or generate reports.

## Exporting to dBase

Exporting to dBase creates the following six dbf files in the root folder of drive C:

File name	Description
HM_LDOIN.dbf	Local doctor information
HM_DEIN.dbf	Dentist information
HM_HDDA.dbf	Student Health demographic data
HM_IMDA.dbf	Immunization data
HM_EXRE.dbf	Examination records
HM_HCOD.dbf	Health conditions (including level and comments)

Exporting to dBase also generates the following four (.dbt) memo files in the root folder of drive C, related to database files containing memo field:

HM_EXRE.dbt	HM_HCOD.dbt
HM_HDDA.dbt	HM_IMDA.dbt

### Doctor Information File HM\_LDOIN.dbf

This file contains the Doctor details for each student from their Student Profile.

Field Name	Data Type	Data Size	Description
index	Numeric	6 (decimal=0)	Student ID (from Win School)
name	Character	39	Doctor Name
offphone	Character	23	Doctor Office Phone number
homephone	Character	23	Doctor Home Phone number
addr1	Character	35	Doctor Address1
addr2	Character	35	Doctor Address2
city	Character	35	Doctor City
state	Character	29	Doctor State
zip	Character	13	Doctor Zip

### Dentist Information File HM\_DEIN.dbf

This file contains the Dentist details for each student from their Student Profile.

Field Name	Data Type	Data Size	Description
index	Numeric	6 (decimal=0)	Student ID (from Win School)
name	Character	39	Dentist Name
offphone	Character	23	Dentist Office Phone number
homephone	Character	23	Dentist Home Phone number
addr1	Character	35	Dentist Address1
addr2	Character	35	Dentist Address2
city	Character	35	Dentist City
state	Character	29	Dentist State
zip	Character	13	Dentist Zip
lastupdate	Date	8	Last update date

### Student Demographics File HM\_HDDA.dbf

This file contains the student Health demographic data for each student from their Student Profile.

Field Name	Data Type	Data Size	Description
index	Numeric	6 (decimal=0)	Student ID (from Win School)
medicare	Character	39	Medicare number
height	Character	15	Height
weight	Character	15	Weight
studentaid	Character	50	(Not used)
immcode	Numeric	11 (decimal=0)	Immunization Status Code (see table below)
immdesc	Text	30	Immunization Status Description (see table below)
legalalert	Logical	1	Legal Alert Flag from Win School (F=False, T=True)
medalflag	Logical	1	Health module Medical Alert Flag (F=False, T=True)
medalcond	Character	254	Health module medical alert condition
medalcomm	Memo		Health module medical alert comment
provenrfla	Logical	1	Provisional Enrolment Flag (F=False, T=True)
provenrdat	Date	8	Provisional Enrolment Date
lastupdate	Date	8	Last update date
arcflag	Logical	1	Archive Flag (F=False, T=True)
arcflagdat	Date	8	Archive Flag Date
user	Character	15	User name

<b>Immunization Status Code</b>	<b>Immunization Status Description</b>
1	N/A
4	Religious Exemption
5	Parental Exemption
6	Medical Exemption
7	Military Exemption
8	Illness Exemption

### Immunization Data File HM\_IMDA.dbf

This file contains the immunization record for each student from their student medical record, including immunization, action, and reaction.

<b>Field Name</b>	<b>Data Type</b>	<b>Data Size</b>	<b>Description</b>
index	Numeric	6 (decimal=0)	Student ID (from Win School)
itemcode	Numeric	11 (decimal=0)	Immunization Code
itemdesc	Character	30	Immunization Title
actioncode	Numeric	11 (decimal=0)	Action Code (see table below)
actiondesc	Character	30	Action Description (see table below)
date	Date	8	Date of the Immunization assignment
time	Date	8	Time of the Immunization assignment
dosage	Numeric	19 (decimal=5)	(Not used)
nnote	Memo		Immunization Assignment Comment
lastupdate	Date	8	Last update date
user	Character	15	User name
reactionco	Numeric	11 (decimal=0)	Reaction code
reactionde	Character	30	Reaction description

<b>Immunization Action Code</b>	<b>Immunization Action Description</b>
1	N/A
2	Administered
3	Medical Exemption
4	Military Exemption
5	Parental Exemption
6	Religious Exemption
7	Illness Exemption

### Examination Records File HM\_EXRE.dbf

This file contains the examination records for each student from the Examinations area in the student medical record, including examination title, description, and exam code.

Field Name	Data Type	Data Size	Description
exindex	Numeric	11 (decimal=0)	Examination internal index
student	Numeric	6 (decimal=0)	Student ID (from Win School)
date	Date	8	Date of the examination
age	Numeric	6 (decimal=0)	Student age at the time of examination If student age is "N/A", it is exported as "500", "0", or " " (blank)
grade	Character	3	Student grade at the time of examination
titlcode	Numeric	11 (decimal=0)	Examination title code
titldesc	Character	29	Examination title
statcode	Numeric	11 (decimal=0)	Examination Status Code
statdesc	Character	29	Examination Status name
catcode	Numeric	11 (decimal=0)	Examination Category code
catdesc	Character	29	Examination Category name
ex2index	Numeric	11 (decimal=0)	Examination Code ID (code)
excdcode	Character	29	Examination Code name
excdesc	Memo		Examination (Category) comment
user	Character	15	User name
lastupdate	Date	8	Date of examination

### Health Conditions File HM\_HCOD.dbf

This file contains the Health conditions for each student from the Conditions area in the student medical record, including condition level and comments.

Field Name	Data Type	Data Size	Description
index	Numeric	6 (decimal=0)	Student ID (from Win School)
condcode	Character	4	Condition Code
conddesc	Character	29	Condition Name
levelcode	Character	4	Condition Level Code
leveldesc	Character	29	Condition Level Name
date	Date	8	Date of condition assignment
com1code	Character	4	Condition Comment code
com1desc	Character	254	Condition Comment

Field Name	Data Type	Data Size	Description
com2code	Character	4	Condition Comment code
com2desc	Character	254	Condition Comment
com3code	Character	4	Condition Comment code
com3desc	Character	254	Condition Comment
com4code	Character	4	Condition Comment code
com4desc	Character	254	Condition Comment
comment	Memo		Additional Comment
user	Character	15	User name
lastupdate	Date	8	Last update date

## Exporting to Access

Exporting to Access creates the HealthExport.mdb file in the C:\ root directory. HealthExport.mdb contains the following six tables with no relation between the tables.

LDOIN_LocalDoctorInformationExport	DEIN_DentistInformationExport
HDDA_HealthDemographicDataExport	IMDA_ImmunizationDataExport
EXRE_ExaminationRecordsExport	HCOD_HealthConditionsExport

### Doctor Information Table, LDOIN\_LocalDoctorInformationExport

This table contains the Doctor details for each student from their Student Profile.

Field Name	Data Type	Description
Index	Number (integer)	Student ID (from Win School)
Name	Text (39 char)	Doctor Name
OffPhone	Text (23 char)	Doctor Office Phone number
HomePhone	Text (23 char)	Doctor Home Phone number
Addr1	Text (35 char)	Doctor Address1
Addr2	Text (35 char)	Doctor Address2
City	Text (35 char)	Doctor City
State	Text (29 char)	Doctor State
Zip	Text (13 char)	Doctor Zip

### Dentist Information Table DEIN\_DentistInformationExport

This table contains the Dentist details for each student from their Student Profile.

Field Name	Data Type	Description
Index	Number (integer)	Student ID (from Win School)
Name	Text (39 char)	Dentist Name
OffPhone	Text (23 char)	Dentist Office Phone number
HomePhone	Text (23 char)	Dentist Home Phone number
Addr1	Text (35 char)	Dentist Address1
Addr2	Text (35 char)	Dentist Address2
City	Text (35 char)	Dentist City
State	Text (29 char)	Dentist State
Zip	Text (13 char)	Dentist Zip
LastUpdate	Date/Time	Last update date

### Student Demographics Table HDDA\_HealthDemographicDataExport

This table contains the student Health demographic data for each student from their Student Profile.

Field	Data Type	Description
Index	Number (integer)	Student ID (from Win School)
Medicare	Text (39 char)	Medicare number
Height	Text (15 char)	Height
Weigh	Text (15 char)	Weigh
StudentAid	Text (50 char)	(Not used)
ImmCode	Number (long integer)	Immunization Status Code (see table below)
ImmDesc	Text (30 char)	Immunization Status Description (see table below)
LegalAlertFlag	Yes/No	Legal Alert Flag used in Win School (1=Active, 0=Inactive)
MedAlFlag	Yes/No	Health module Medical Alert Flag (1=Active, 0=Inactive)
MedAlCond	Text (255 char)	Health module medical alert condition
MedAlComm	Memo	Health module medical alert comment
ProvEnrFlag	Yes/No	Provisional Enrolment Flag (1=Active, 0=Inactive)
ProvEnrDate	Date/Time	Provisional Enrolment Date
LastUpdate	Date/Time	Last update date
ArcFlag	Yes/No	Archive Flag (1=Active, 0=Inactive)
ArcFlagDate	Date/Time	Archive Flag Date
User	Text (15 char)	User name

<b>Immunization Status Code</b>	<b>Immunization Status Description</b>
1	N/A
4	Religious Exemption
5	Parental Exemption
6	Medical Exemption
7	Military Exemption
8	Illness Exemption

### **Immunization Information Table IMDA\_ImmunizationDataExport**

This table contains the immunization record for each student from their medical record, including immunization, action, and reaction.

<b>Field</b>	<b>Data Type</b>	<b>Description</b>
Index	Number (integer)	Student ID (from Win School)
ItemCode	Number (long integer)	Immunization Code
ItemDesc	Text (30 char)	Immunization Title
ActionCode	Number (long integer)	Action Code (see table below)
ActionDesc	Text (30 char)	Action Description (see table below)
Date	Date/Time	Date of the Immunization assignment
Time	Date/Time	Time of the Immunization assignment
Dosage	Number (double)	(Not used)
Nnote	Memo	Immunization Assignment Comment
LastUpdate	Date/Time	Last update date
User	Text (15 char)	User name
ReactionCode	Number (long integer)	Reaction code
ReactionDesc	Text (30 char)	Reaction Description

<b>Immunization Action Code</b>	<b>Immunization Action Description</b>
1	N/A
2	Administered
3	Medical Exemption
4	Military Exemption
5	Parental Exemption
6	Religious Exemption
7	Illness Exemption

### **Examination Records Table EXRE\_ExaminationRecordsExport**

This table contains the examination records for each student from the Examinations area in the student medical record, including examination title, description, and exam code.

<b>Field Name</b>	<b>Data Type</b>	<b>Description</b>
ExIndex	AutoNumber (long integer)	Examination internal index
Student	Number (integer)	Student ID (from Win School)
Date	Date/Time	Date of the examination
Age	Number (integer)	Student age at the time of examination If student age is "N/A", it is exported as "500", "0", or " " (blank)
Grade	Text (3 char)	Student grade at the time of examination
TitlCode	Number (long integer)	Examination title code
TitlDesc	Text (29 char)	Examination Title
StatCode	Number (long integer)	Examination Status Code
StatDesc	Text (29 char)	Examination Status name
CatCode	Number (long integer)	Examination Category code
CatDesc	Text (29 char)	Examination Category name
EX2Index	Number (long integer)	Examination Code ID (code)
ExCdCode	Text (29 char)	Examination Code name
ExCdDesc	Memo	Examination (Category) comment
User	Text (15 char)	User name
LastUpdate	Date/Time	Date of examination

## Health Conditions Table HCOD\_HealthConditionsExport

This table contains the Health conditions for each student from the Conditions area in the student medical record, including condition level and comments.

Field	Data Type	Description
Index	Number	Student ID (from Win School)
CondCode	Text (4 char)	Condition Code
CondDesc	Text (29 char)	Condition Name
LevelCode	Text (4 char)	Condition Level Code
LevelDesc	Text (29 char)	Condition Level Name
Date	Date/Time	Date of condition assignment
Com1Code	Text (4 char)	Condition Comment code
Com1Desc	Text (255 char)	Condition Comment
Com2Code	Text (4 char)	Condition Comment code
Com2Desc	Text (255 char)	Condition Comment
Com3Code	Text (4 char)	Condition Comment code
Com3Desc	Text (255 char)	Condition Comment
Com4Code	Text (4 char)	Condition Comment code
Com4Desc	Text (255 char)	Condition Comment
Comment	Memo	Additional Comment
User	Text (15 char)	User name
LastUpdate	Date/Time	Last update date

## Exporting to Excel

Exporting to Excel creates the HealthExport.xls workbook in the root folder of drive C, which contains the following six spreadsheets:

LDOIN_LocalDoctorInformationExp	DEIN_DentistInformationExport
HDDA_HealthDemographicDataExp	IMDA_ImmunizationDataExport
EXRE_ExaminationRecordsExport	HCOD_HealthConditionsExport

## Doctor Information Sheet LDOIN\_LocalDoctorInformationExp

This spreadsheet contains the Doctor details for each student from their Student Profile.

Column	Description
Index	Student ID (from Win School)
Name	Doctor name
OffPhone	Doctor Office Phone number
HomePhone	Doctor Home Phone number

Column	Description
Addr1	Doctor address1
Addr2	Doctor address2
City	Doctor City
State	Doctor State
Zip	Doctor Zip

### Dentist Information Sheet DEIN\_DentistInformationExport

This spreadsheet contains the Dentist details for each student from their Student Profile.

Column	Description
Index	Student ID (from Win School)
Name	Dentist Name
OffPhone	Dentist Office Phone number
HomePhone	Dentist Home Phone number
Addr1	Dentist Address1
Addr2	Dentist Address2
City	Dentist City
State	Dentist State
Zip	Dentist Zip
LastUpdate	Last update date

### Student Demographics Sheet HDDA\_HealthDemographicDataExpor

This spreadsheet contains the student Health demographic data for each student from their Student Profile.

Column	Description
Index	Student ID (from Win School)
Medicare	Medicare number
Height	Height
Weigh	Weigh
StudentAid	(Not used)
ImmCode	Immunization Status Code (see table below)
ImmDesc	Immunization Status Description (see table below)
LegalAlertFlag	Legal Alert Flag imported from Win School (True/False)
MedAlFlag	Health module Medical Alert Flag (True/False)
MedAlCond	Health module Medical Alert condition
MedAlComm	Health module Medical Alert Comment
ProvEnrFlag	Provisional Enrolment Flag (True/False)

Column	Description
ProvEnrDate	Provisional Enrolment Date
LastUpdate	Last update date
ArcFlag	Archive Flag (True/False)
ArcFlagDate	Archive Flag Date
User	User name

Immunization Status Code	Immunization Status Description
1	N/A
4	Religious Exemption
5	Parental Exemption
6	Medical Exemption
7	Military Exemption
8	Illness Exemption

### Immunization Data Sheet IMDA\_ImmunizationDataExport

This spreadsheet contains the immunization record for each student from their medical record, including immunization, action, and reaction.

Column	Description
Index	Student ID (from Win School)
ItemCode	Immunization Code
ItemDesc	Immunization Title
ActionCode	Action Code (see table below)
ActionDesc	Action Description (see table below)
Date	Date of the Immunization assignment
Time	Time of the Immunization assignment
Dosage	(Not used)
Nnote	Immunization Assignment Comment
LastUpdate	Last update date
User	User name
ReactionCode	Reaction code
ReactionDesc	Reaction description

<b>Immunization Action Code</b>	<b>Immunization Action Description</b>
1	N/A
2	Administered
3	Medical Exemption
4	Military Exemption
5	Parental Exemption
6	Religious Exemption
7	Illness Exemption

### **Examination Records Sheet EXRE\_ExaminationRecordsExport**

This spreadsheet contains the examination records for each student from the Examinations area in their medical record, including examination title, description, and exam code.

<b>Column</b>	<b>Description</b>
ExIndex	Examination internal index
Student	Student ID (from Win School)
Date	Date of the examination
Age	Student age at the time of examination If student age is "N/A", it is exported as "500", "0", or " " (blank)
Grade	Student grade at the time of examination
TitlCode	Examination title code
TitlDesc	Examination Title
StatCode	Examination Status Code
StatDesc	Examination Status name
CatCode	Examination Category code
CatDesc	Examination Category name
EX2Index	Examination Code ID (code)
ExCdCode	Examination Code name
ExCdDesc	Examination (Category) comment
User	User name
LastUpdate	Date of examination

## Health Conditions Sheet HCOD\_HealthConditionsExport

This spreadsheet contains the Health conditions for each student in the Conditions area in their medical record, including condition level and comments.

Column	Description
Index	Student ID (from Win School)
CondCode	Condition Code
CondDesc	Condition Name
LevelCode	Condition Level Code
LevelDesc	Condition Level Name
Date	Date of condition assignment
Com1Code	Condition Comment code
Com1Desc	Condition Comment
Com2Code	Condition Comment code
Com2Desc	Condition Comment
Com3Code	Condition Comment code
Com3Desc	Condition Comment
Com4Code	Condition Comment code
Com4Desc	Condition Comment
Comment	Additional Comment
User	User name
LastUpdate	Last update date

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