

NOBLE*TRACKER



NOBLE HOUSE
The Comprehensive RemedySM

NOBLE*TRACKER

Noble House

**828 S.E. 8th Avenue
Deerfield Beach, FL 33441
Sales (561) 392-6700**

**Technical Support (954) 418-0829
Fax (954) 418-9631**

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1 Quick Start

This quick start section introduces you to the main window of Noble*Tracker and helps you get the software up and running quickly.

Because Noble*Tracker requires Noble*Direct for Windows, you must set up Noble*Direct before using Noble*Tracker. Please refer to the documentation for Noble*Direct for Windows for assistance.

This quick start section covers the following topics:

- Starting Noble*Tracker
- The Noble*Tracker Main Window
- Setting Up

Starting Noble*Tracker

To start Noble*Tracker:

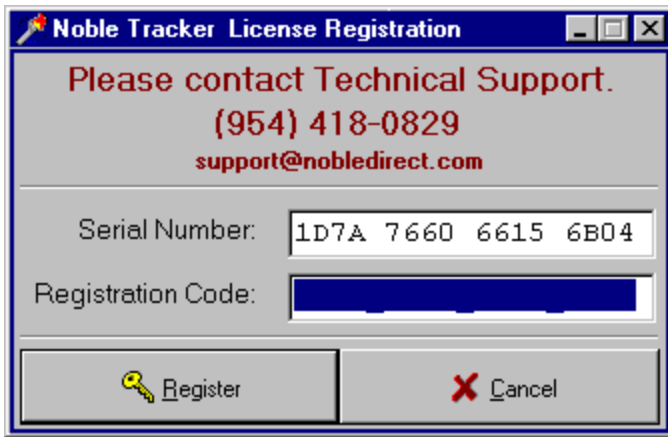
1. From the Windows Start menu, select the Programs group, then the Noble House group.
2. Click on the Noble Tracker icon; the system presents the logon dialog.



3. Select your User ID from the drop-down menu, enter your password, and click OK.

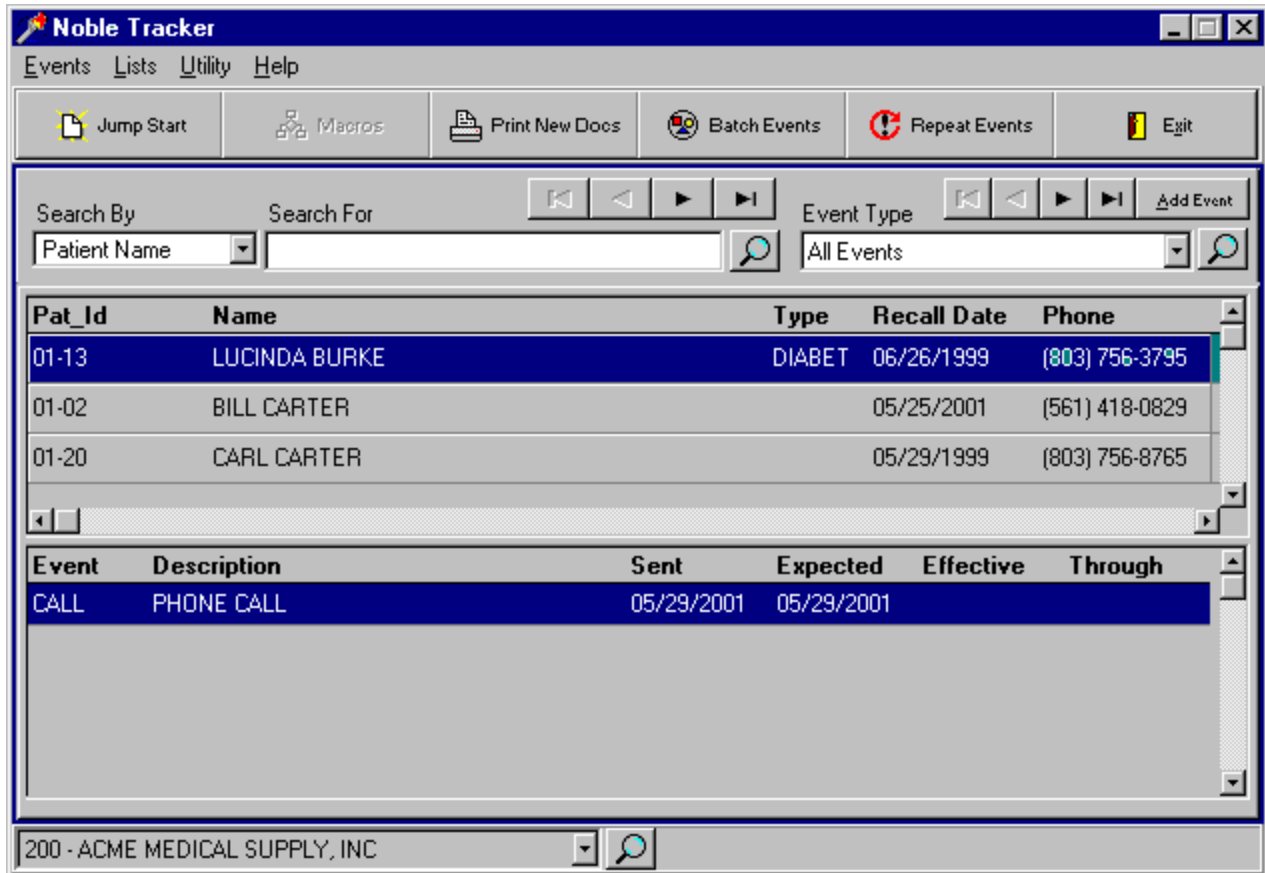
After a few moments and some informational windows, the Noble*Tracker main window appears. See The Noble*Tracker Main Window for more details.

NOTE: The very first time you launch Noble*Tracker, the system will display the screen below. Please enter the registration code and click Register. For help, call or email Technical Support (954-418-0829, support@nobledirect.com).



The Noble*Tracker Main Window

The main window appears when you start Noble*Tracker. By selecting from the options on this screen, you can access all of the functionality in the software.



Noble*Tracker is divided into three categories of functionality:

Events - manages Events, including event creation, updating, and the generation of documents related to the events.

Lists - generates event-related reports.

Utility - provides support utilities for events, including undo and reprint features.

These three categories appear as menus across the top of the main window. The main window also contains a toolbar that provides quick access to the most commonly used functions.

Note the following:

- You may select the practice whose events you wish to manage by clicking on the Magnifying Glass at the bottom of the screen and selecting the practice from the Choice List that appears.
- The top of the screen lists the patients. The bottom part of the screen lists the events for each patient. To see the events for a patient, click on that patient. You may also filter the events that display for each patient by selecting only that event from the event drop-down.
- You may right-click on an event to display a popup menu that will allow you to complete that event; events that don't have a set duration may be marked as completed. The same popup menu also allows you to edit the event or delete it.
- You may scroll through the list of patients by using the VCR Buttons in the center of the screen; use the VCR buttons to the right to scroll through the list of events for each patient.
- You may also locate a patient using Noble*Tracker's Locate a Patient feature.

For details about the commands on each menu in the main window, see the following:

Events Menu

Lists Menu

Utility Menu

Help Menu

Event

An event can be any occurrence that you wish to note or wish the system to bring to your attention. For example, an event can be a phone call, the issuing of a CMN, or the sending out of a log book. An event is categorized into an Event Type and has the characteristics of that event type. An event:

- can trigger the printing of documents and labels (e.g., Welcome Letter)
- can have associated documents that can be expected to be returned at a certain time (e.g., Logbook)
- may have a set duration (e.g., six months).
- may be repeated (e.g., CMNs)

Event Type

An event type is a way to categorize an Event (e.g., CALL, LOG, CMN). Event Types have certain characteristics:

- Event Types can trigger the printing of documents and labels (e.g., Welcome Letter)
- These documents can be expected to be returned at a certain time (e.g., Logbook)
- Event Types may have a set duration (e.g., six months).
- Event Types may be repeated (e.g., CMNs)

An Event is an individual instance of an Event Type.

VCR Buttons



Press the First button to move to the first item in the list.



Press the Previous button to move to the previous item in the list.



Press the Next button to move to the next item in the list.



Press the Last button to move to the last item in the list.

Locating a Patient

To locate a patient using the search utility:

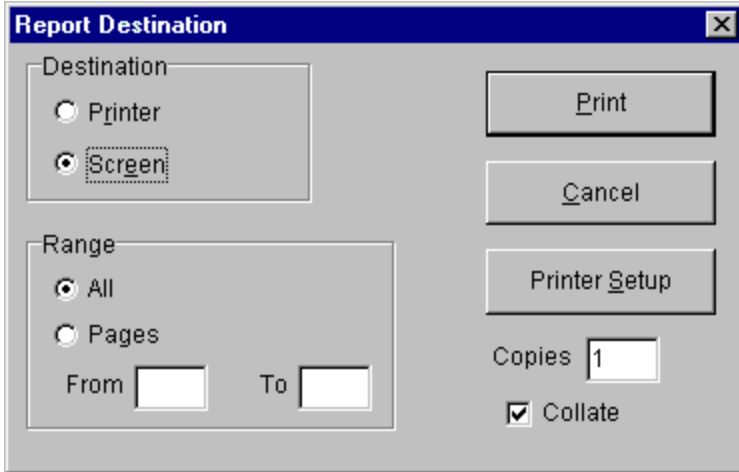
1. Choose the criterion that you want to use to find the patient from the drop-down list.
When you choose a criterion, the list of items is sorted in ascending order by that criterion and the criterion is highlighted in each item.
2. Enter the text for which you want to search in the field.
As you enter characters, Noble*Direct narrows in on your selection. The search utility looks for the text exactly as it is entered from the beginning of the field and does not accept wildcards such as "*" or "?." For example, if you were searching for the last name of "White", entering "whi" would return the correct patient name. Entering "?ite", "*ite", "wh*", "wh?" or "ite" would not. In addition, the search field is not case sensitive.
To display all of the items again, press the Reset button.

To locate a patient using the choice list:

1. Press the Magnifying Glass button.
The Patients Choice List appears.
2. In the Search By drop-down list, choose the criterion that you want to use to find the patient.
When you choose a criterion, the list of items is sorted in ascending order by that criterion and the criterion is highlighted in each item.
3. Enter the text for which you want to search in the Search For field.
As you enter characters, Noble*Tracker narrows in on your selection. Again, this field does not use wildcards and is not case-sensitive.
4. When the patient that you want to select is highlighted, press the Select button in the Patients Choice List.
This patient is now the selected patient.
To display all of the items again, press the Reset button.

Report Destination Window

This window appears when you are generating a report. Each field is explained below.



Destination - Select "Printer" or "Screen" depending on where you'd like to see the report. If you select the "Printer" option, the report prints on the printer that you have set up. If you select the "Screen" option, the report is shown in the Viewer window. From the Viewer window, you can print one or more of the pages of the report on your printer.

Range - Click the option button to indicate the pages of the report that you want to print to your chosen destination. If you choose the "Pages" option, enter the range of pages that you want to print in the From and To fields.

Print Button - Prints the report to your chosen destination.

Cancel Button - Cancels the report printing.

Printer Setup Button - Displays the Print Setup window, which you can use to select the printer to use and other printing options.

Copies - Specifies the number of copies that you want to print.

Collate - Organizes the numbered pages when you print multiple copies of a report. Checking this checkbox prints a complete copy of the report before the next copy is printed.

2 Events

Events functionality automates the management and tracking of Events, including event creation, updating, and the generation of documents related to the events.

You can access Events functionality in one of two ways:

- (1) From the Events menu in the Noble*Tracker Main Window.
- (2) Using the buttons on the Main Window.

All of the functions are listed below.

Menu Command

Jump Start

Macros

Print New Documents

Batch Event Creation

Repeat Events

Add New Event

Edit Current Event

Delete Current Event

Receive Bar Code Events

Exit

Events: Jump Start

See Batch Event Creation

Events: Macros

Not Yet Implemented.

Events: Print New Documents

Events in Noble*Tracker may be generated by other Noble systems. For example, events may be generated by Noble*Labels when it prints packing labels or by Noble*Direct's capped rentals. When this happens, you may want to print any documents and labels associated with these events. That's what this function is for.

To print new documents:

1. Select an Event Type from the drop-down list at the upper right of the Noble*Tracker main window.
2. From the Events menu in the Noble*Tracker main window, choose the Print New Documents command. The system will Print Event Documents and return you to the Noble*Tracker Main Window.

Events: Batch Event Creation

Noble*Tracker allows you to create a number of Events at one time. These batch events may also be Uncreated.

To create batch events:

1. Select an Event Type from the drop-down list at the upper right of the Noble*Tracker main window.
2. From the Events menu in the Noble*Tracker main window, choose the Jump Start or Batch Event Creation command; you may also click the buttons of the same name. The system displays the Batch Event Creation window.

3. Narrow down the transactions from which events are generated by selecting the providers, insurance companies, and patients for the transactions that you want to include. You must select all, one, or a range of items for each of these criterion.

To select all of the items for the criterion: Click on the All tab for the criterion. For example, if you want to include all of the providers, click on the All tab.

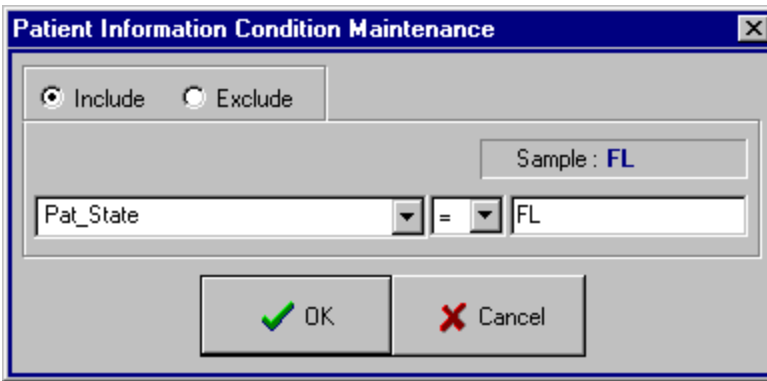
To select one item for the criterion: Click on the One tab for the criterion, and then select your one item choice from the drop-down list or by pressing the Magnifying Glass button.

To select a range of items for the criterion: Click on the Range tab for the criterion. Enter the beginning item for the range from the first drop-down list and the ending item for the range from the second drop-down list. You can also select the starting or ending item using the Magnifying Glass button. Click in the field for which you want to make a choice, press the Magnifying Glass button, click on your choice in the window that appears, and then press the Select button.

If you want the events to reflect a single patient or insurance type, enter the type in the respective Type field.

4. You may also further limit the transactions from which the events are generated by filtering using patient information.
 - To add a filter, click the plus sign next to the filter you would like to use or right-click in the filter's box and choose the Add Condition option. The system presents the window for the filter you chose.
 - To edit a filter, right-click in the filter's box and choose the Edit Condition option. The system presents the window for the filter you chose.
 - To delete a filter, click the minus sign next to the filter you would like to use or right-click in the filter's box and choose the Delete Condition option. The system deletes the filter.
5. Add or edit the filter.

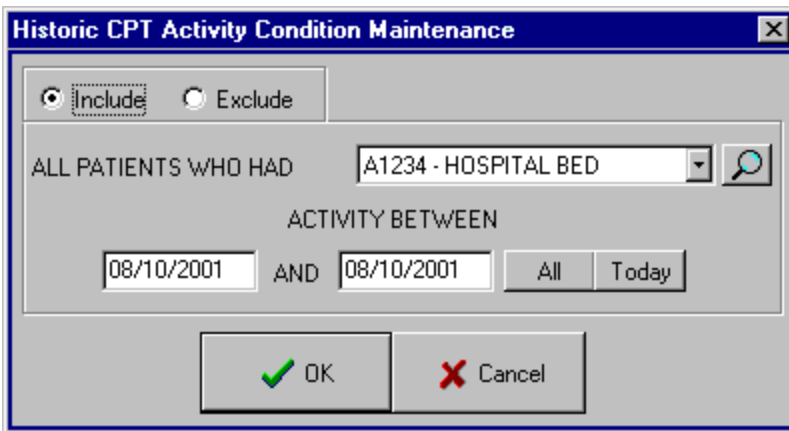
Patient Information:



Click whether you would like to include or exclude information based on the filter.

Create the filter by selecting a patient field from the drop-down menu, selecting an operator (e.g., equal to, less than), and entering the value. In the example above, only patients from the state of Florida will be included, because you created a condition that says "Include all patients whose Pat_State equals FL."

Historic CPT Activity:



Click whether you would like to include or exclude information based on the filter.

Create the filter by selecting a CPT Code from the drop-down menu and entering the activity date range.

Events:

The dialog box is titled "Event Condition Maintenance". It features two radio buttons at the top: "Include" (selected) and "Exclude". Below this, there is a text field containing "ALL PATIENTS WHO HAVE A" followed by a dropdown menu showing "WELCOM - WELCOME LETT" and a search icon. Underneath, another dropdown menu is set to "EVENT CREATED DATE" with the word "BETWEEN" to its right. Two date input fields are present, both containing "08/10/2001", with the word "AND" between them. To the right of these date fields are two buttons: "All" and "Today". At the bottom of the dialog are two buttons: "OK" with a green checkmark and "Cancel" with a red X.

Click whether you would like to include or exclude information based on the filter.

Create the filter by selecting the event type from the drop-down menu, selecting the kind of event date, and entering the date range.

- Click OK; the system returns you to the Batch Event Creation screen, with the filters displayed.

The dialog box shows a list of filters. The first filter is "Filter Patients by Additional Patient Information" with a plus sign and the text "+ Include all patients whose Pat_Pra_Id field equals '100'". The second filter is "Filter Patients by Historic CPT Activity" with a plus sign and the text "+ Include all patients who had A1234 activity between 08/10/2001 and 08/10/200". The third filter is "Filter Patients by Event History" with a plus sign and the text "+ Include all patients who have a WELCOM event Created Date between 08/10/200 and 08/10/200". Each filter has a plus sign on the left and a minus sign on the right. At the bottom are "OK" and "Cancel" buttons.

Note that you can permanently set up filters ahead of time using the Default Conditions option of the Setup Options command in the Utilities menu. Filters you add or delete during Batch Event Creation will only persist for the current set of events you are creating.

- Click OK; the system asks you to enter the Sent Date for this batch of events.

The dialog box is titled "Please enter a date" and has a close button (X) in the top right corner. It contains a "Sent Date" label followed by a text field containing "08/06/2001" and a "Today" button. At the bottom are "OK" and "Cancel" buttons.

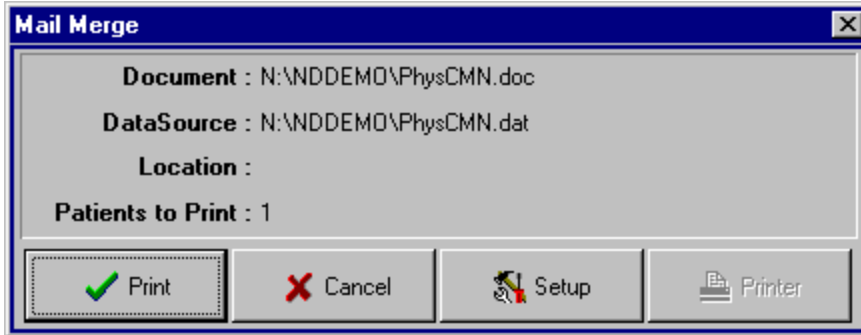
- Enter the date and click OK. The system asks you to confirm the event creation.
- Click OK. The system creates the events. If the event type is one that generates a printed document, it will Print Event Documents. Otherwise, it will return you to the Noble*Tracker Main Window.

Print Event Documents

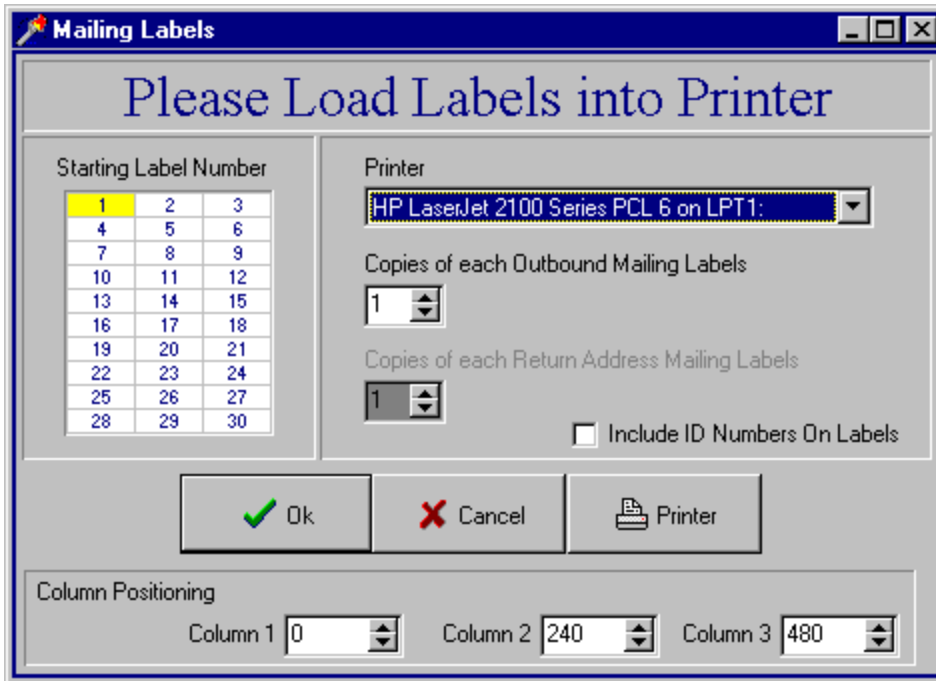
From Batch Event Creation, Print New Documents, Repeat Events, and Add New Event, the system prints the documents that are associated with the event.

To print event documents:

1. The system displays the Mail Merge Window, listing the documents you set up when you created the Event Type.



2. Click Print. The system will send the output directly to the printer or ask you to select the output destination (e.g., screen or printer) by displaying the Report Destination Window. It then displays the Mailing Labels Window.



3. Put the appropriate paper in the printer and select the number of copies.

Identify the position of the label on the page where you would like printing to begin by clicking on a location or selecting the label number.

If necessary, adjust the vertical or horizontal positioning of the labels by selecting an adjustment number. Numbers represent 1/300th of an inch.

Click OK. The system will send the output directly to the printer or ask you to select the output destination (e.g., screen or printer) by displaying the Report Destination Window.

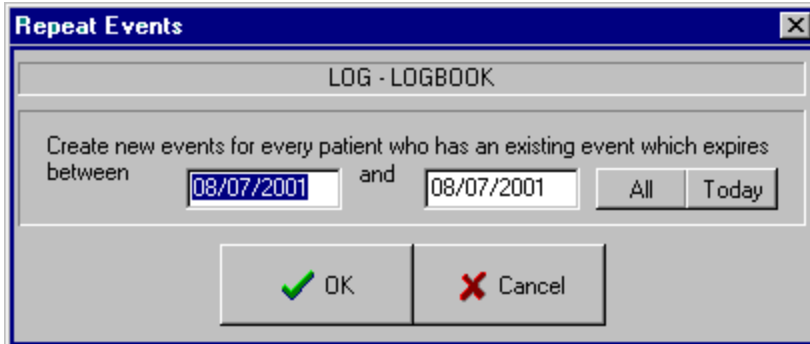
When printing is complete, the system returns you to the Noble*Tracker Main Window.

Events: Repeat Events

Depending upon its Event Type, some Events may have a set duration (e.g., six months) and may be repeated. For example, a CMN event might have a duration of six months and would need to be entered again for it to be tracked. Noble*Tracker allows you to repeat such existing events so you may continue to track them.

To repeat events:

1. Select an Event Type from the drop-down list at the upper right of the Noble*Tracker main window.
2. From the Events menu in the Noble*Tracker main window, choose the Repeat Events command; you may also click the button of the same name. The system displays the Repeat Events window.



3. Enter a From date and a To date. The system will select the events which expire between these dates for the Event Type you chose and create new events for the upcoming time period. For example, the window above would select any Logbook event types expiring on 08/07/2001 and create new events for them based upon the duration of the logbook Event Type you identified during Event Type creation (e.g., 180 days). You may also click All to select all the events for that Event Type in Noble*Tracker or click Today just to select today's events. Click OK; the system asks you to enter the Sent Date for this batch of events.



4. Enter the Sent Date and click OK. The system asks you to confirm the event creation.
5. Click OK. The system creates the events. If the event type is one that generates a printed document, it will Print Event Documents. Otherwise, it will return you to the Noble*Tracker Main Window.

Events: Add New Event

Noble*Tracker allows you to create Events one at one time as well as in batches. These events may also be Uncreated.

To create an event:

1. Select an Event Type from the drop-down list at the upper right of the Noble*Tracker main window.
2. From the Events menu in the Noble*Tracker main window, choose the Create New Event command; you may also click the Add Event button. The system displays the Add New Event window.

The screenshot shows the 'Add New Event' dialog box. At the top, it displays the event name 'Event : CMN' and its characteristics: 'Expected to Return, Effective Forever', 'Document expected back in 7 days', and 'Prints N:\NDDEMO\PhysCMN.doc and mailing labels (D)'. Below this is a form with several fields: 'Patient' (CARTER, BILL), 'Event Type' (CMN - CMN), and 'Comments'. There are also date fields for 'Date Sent', 'Date Expected', 'Effective From', and 'Effective Through', each with 'Today' and 'Clear' buttons. At the bottom are 'OK' and 'Cancel' buttons.

3. Note the Event Type information at the top of the window. Based on this information, add the details of the event.

Verify the Patient and the Event Type.

Enter comments as necessary.

Enter the dates or click the Today button to enter today's date; the Clear button clears the field.

- Date Sent is the date the documents associated with the event were sent to the patient.
 - Date Expected is the date the documents associated with the event are expected to be returned from the patient.
 - Effective From is the date the event itself goes into effect (e.g., a CMN would become effective when it is signed by a doctor).
 - Effective Through is the date through which the event remains in effect; after this date the event expires.
4. Click OK. The system creates the event. If the event type is one that generates a printed document, it will Print Event Documents. Otherwise, it will return you to the Noble*Tracker Main Window.

Events: Edit Current Event

Noble*Tracker allows you to change Events once they have been created.

To change an event:

1. Select the event in the Noble*Tracker main window by clicking on the proper Patient and then double-clicking on the Event. You may also click once on the Event and choose the Edit Current Event command from the Events menu. The system displays the Edit Current Event window.

Event : CMN
 Expected to Return, Effective Forever
 Document expected back in 7 days
 Prints N:\NDDEMO\PhysCMN.doc and mailing labels (D)

Patient

Event Type

Comments

Date Sent

Date Expected

Effective From

Effective Through

3. Note the Event Type information at the top of the window. Based on this information, add the details of the event.

Change Patient, Event Type, and comments as necessary.

Change the dates or click the Today button to enter today's date; the Clear button clears the field.

- Date Sent is the date the documents associated with the event were sent to the patient.
 - Date Expected is the date the documents associated with the event are expected to be returned from the patient.
 - Effective From is the date the event itself goes into effect (e.g., a CMN would become effective when it is signed by a doctor).
 - Effective Through is the date through which the event remains in effect; after this date the event expires.
4. Click OK. The system changes the event and returns you to the Noble*Tracker Main Window.

Events: Delete Current Event

Noble*Tracker allows you to delete Events once they have been created. You may also Undo event creation.

To delete an event:

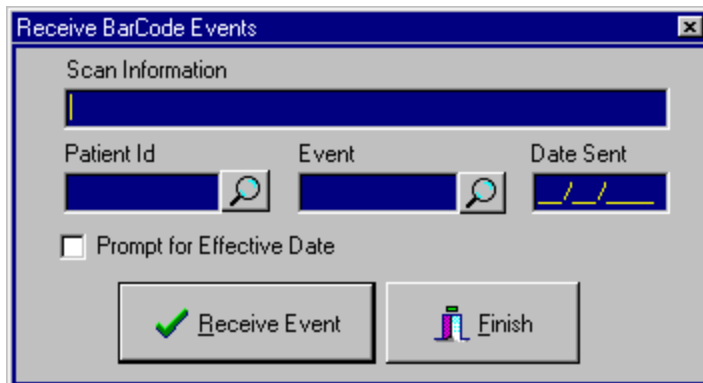
1. Select the event in the Noble*Tracker main window by clicking on the proper Patient and then clicking on the Event.
2. Choose the Delete Current Event command from the Events menu. The system asks you to confirm the delete, deletes the event, and returns to you the Noble*Tracker Main Window.

Events: Receive Bar Code Events

Noble*Tracker allows you to receive bar code information from a scanner hooked to your computer to process receipt confirmations. If you wish to use this function, please call Noble House for additional information.

To receive bar code events:

1. Choose the Receive Bar Code Events command from the Events menu. The system displays the Receive Bar Code Events Window.



2. Scan the bar code; the system will populate the Window with information from the scan.
3. Verify information and click Receive Event; the system accepts the event. You may then continue to enter additional events.
4. Click Finish when you are done; the system returns to you the Noble*Tracker Main Window.

Events: Exit

To exit the software:

1. From the Events menu, choose the Exit command or press the Exit button on the toolbar in the main window.

3 Lists

Lists functionality generates various Events reports.

You can access Lists functionality from the Lists menu in the Noble*Tracker Main Window.

All of the functions are listed below.

Menu Command

Outstanding Letters

Upcoming Completions

Patient Event History

Event Type History

Additional Lists - not yet implemented.

Lists: Outstanding Letters

Noble*Tracker allows you generate a report that identifies all the documents due back to you in the future that are related to events you are tracking.

To generate the outstanding letters list:

1. Choose the Outstanding Letters command from the Lists menu. The system displays the Outstanding Letter Report Window.

The screenshot shows the 'Outstanding Letter Report' window. It features three main sections: 'EVENT TYPES' with 'ALL', 'One', and 'Range' tabs and a dropdown menu set to '10MON - 10 month'; 'PATIENTS' with 'ALL', 'One', and 'Range' tabs, a text field 'INCLUDE ALL PATIENTS', and a 'Type' field; and 'Date Sent' with date fields '01/01/1900' and '08/07/2001', and 'All' and 'Today' buttons. A list of checkboxes is present, including 'Print Documents for the Patients listed on this Report', 'Create event to track documents', 'Print Mailing Labels for the Patients listed on this Report', 'Use Patient File to Create Report (May be faster for individual and small ranges of patients)', 'Exclude Replaced Events (Open events which precede events of the same type)', 'Reload Label Bucket', and 'Evaluate Default Conditions'. At the bottom are 'Print' and 'Cancel' buttons.

2. Narrow down the events from which the list is generated by selecting the event types and patients for the events that you want to include. You must select all, one, or a range of items for each of these criterion.

To select all of the items for the criterion: Click on the All tab for the criterion. For example, if you want to include all of the event types, click on the All tab.

To select one item for the criterion: Click on the One tab for the criterion, and then select your one item choice from the drop-down list or by pressing the Magnifying Glass button.

To select a range of items for the criterion: Click on the Range tab for the criterion. Enter the beginning item for the range from the first drop-down list and the ending item for the range from the second drop-down list. You can also select the starting or ending item using the Magnifying Glass button. Click in the field for which you want to make a choice, press the Magnifying Glass button, click on your choice in the window that appears, and then press the Select button.

You may also limit the selection by choosing a specific patient type.

3. You may also further limit the events from which the list is generated by selecting a date range. Only those events with the Date Sent between the dates you choose will be selected for the list. You may also click the Today button or the All button to select the dates.

4. You may also choose the following options. Click the checkbox:
 - if you would like the documents to be printed again for the events you have selected. This may be a good idea if you expect the patient might have lost the documents that are due back to you.
 - if you would like the system to generate separate events for the tracking of these new documents you are sending.
 - if you would like the system to also print mailing labels.
 - if you would like the system to use the Patient File; this speeds up processing if you are only printing one or a small range of patients.
 - if you would like the system to report on only the most recent event of the same type.
 - to reload label buckets in Noble*Labels with label information from this list of patients. If you click this option, the system will ask you if you want to clear the label buckets in Noble*Labels first or just add to what's there. Then it fills the Labels Bucket in Noble*Labels with the information from this list of patients.
 - to evaluate default conditions. This will further limit the events from which the list is generated by filtering them with the Default Conditions you set up in Setup Options.
5. Click OK. The system will send the output directly to the printer or ask you to select the output destination (e.g., screen or printer) by displaying the Report Destination Window.

When printing is complete, the system prints any additional documents you might have requested that are related to the events. It also generates events as requested to track these documents. The system then returns you to the Noble*Tracker Main Window.

Lists: Upcoming Completions

Noble*Tracker allows you generate a report that identifies all the events that will expire in the future.

To generate the upcoming completions list:

1. Choose the Upcoming Completions command from the Lists menu. The system displays the Upcoming Completions Report Window.

The screenshot shows the 'Upcoming Completions Report' window. It features three main sections for filtering: 'EVENT TYPES', 'PATIENTS', and 'Expected Completion Date'. The 'EVENT TYPES' section has tabs for 'ALL', 'One', and 'Range', with a search field containing '10MON - 10 month'. The 'PATIENTS' section has tabs for 'ALL', 'One', and 'Range', with a search field containing 'INCLUDE ALL PATIENTS' and a 'Type' field. The 'Expected Completion Date' section has two date pickers set to '01/01/1900' and '12/31/2999', along with 'All' and 'Today' buttons. Below these are several checkboxes for report options, including 'Print Documents', 'Print Mailing Labels', 'Exclude Replaced Events', 'Reload Label Bucket', and 'Evaluate Default Conditions'. At the bottom are 'Print' and 'Cancel' buttons.

2. Narrow down the events from which the list is generated by selecting the event types and patients for the events that you want to include. You must select all, one, or a range of items for each of these criterion.

To select all of the items for the criterion: Click on the All tab for the criterion. For example, if you want to include all of the event types, click on the All tab.

To select one item for the criterion: Click on the One tab for the criterion, and then select your one item choice from the drop-down list or by pressing the Magnifying Glass button.

To select a range of items for the criterion: Click on the Range tab for the criterion. Enter the beginning item for the range from the first drop-down list and the ending item for the range from the second drop-down list. You can also select the starting or ending item using the Magnifying Glass button. Click in the field for which you want to make a choice, press the Magnifying Glass button, click on your choice in the window that appears, and then press the Select button.

You may also limit the selection by choosing a specific patient type.

3. You may also further limit the events from which the list is generated by selecting a date range. Only those events with an Expected Completion Date between the dates you choose will be selected for the list. You may also click the Today button or the All button to select the dates.

4. You may also choose the following options. Click the checkbox:
 - if you would like the documents to be printed again for the events you have selected. This may be a good idea if you expect the patient might have lost the documents that are due back to you.
 - if you would like the system to generate separate events for the tracking of these new documents you are sending.
 - if you would like the system to also print mailing labels.
 - if you would like the system to use the Patient File; this speeds up processing if you are only printing one or a small range of patients.
 - if you would like the system to report on only the most recent event of the same type.
 - to reload label buckets in Noble*Labels with label information from this list of patients. If you click this option, the system will ask you if you want to clear the label buckets in Noble*Labels first or just add to what's there. Then it fills the Labels Bucket in Noble*Labels with the information from this list of patients.
 - to evaluate default conditions. This will further limit the events from which the list is generated by filtering them with the Default Conditions you set up in Setup Options.
5. Click OK. The system will send the output directly to the printer or ask you to select the output destination (e.g., screen or printer) by displaying the Report Destination Window.

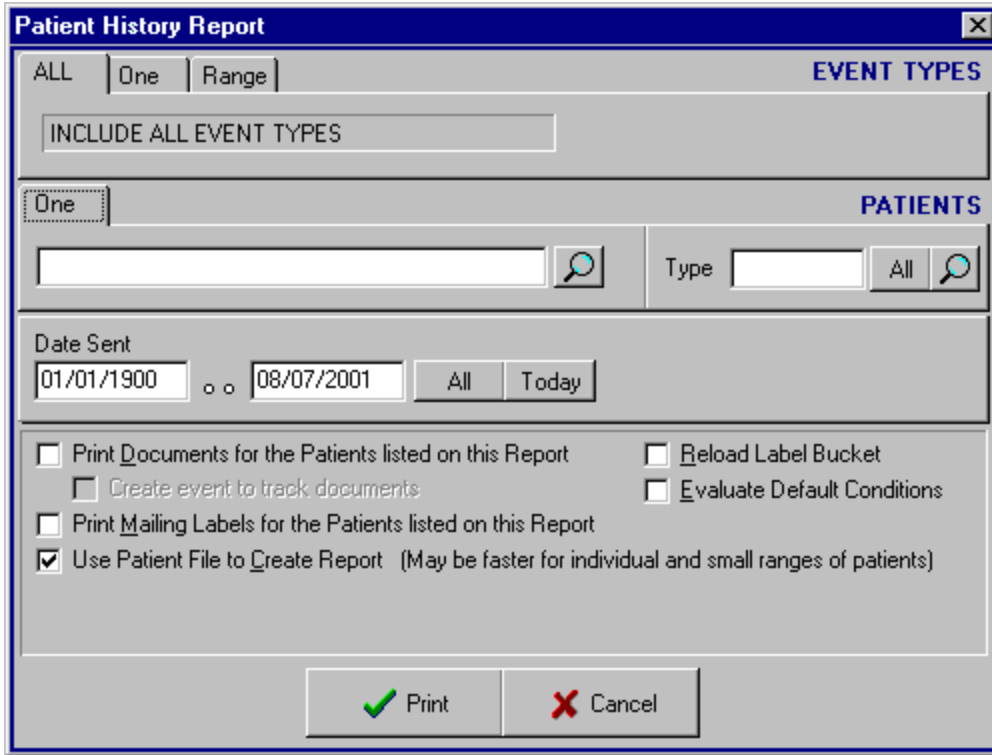
When printing is complete, the system prints any additional documents you might have requested that are related to the events. It also generates events as requested to track these documents. The system then returns you to the Noble*Tracker Main Window.

Lists: Patient Event History

Noble*Tracker allows you generate a report that identifies the event history for one particular patient.

To generate the patient event history list:

1. Choose the Patient Event History command from the Lists menu. The system displays the Patient History Report Window.



2. Narrow down the events from which the list is generated by selecting the event types and the patient for the events that you want to include. You may select all, one, or a range of events; you may only select one patient.

To select all of the items for the criterion: Click on the All tab for the criterion. For example, if you want to include all of the event types, click on the All tab.

To select one item for the criterion: Click on the One tab for the criterion, and then select your one item choice from the drop-down list or by pressing the Magnifying Glass button.

To select a range of items for the criterion: Click on the Range tab for the criterion. Enter the beginning item for the range from the first drop-down list and the ending item for the range from the second drop-down list. You can also select the starting or ending item using the Magnifying Glass button. Click in the field for which you want to make a choice, press the Magnifying Glass button, click on your choice in the window that appears, and then press the Select button.

You may also limit the selection by choosing a specific patient type.

3. You may also further limit the events from which the list is generated by selecting a date range. Only those events with the Date Sent between the dates you choose will be selected for the list. You may also click the Today button or the All button to select the dates.

4. You may also choose the following options. Click the checkbox:
 - if you would like the documents to be printed again for the events you have selected. This may be a good idea if you expect the patient might have lost the documents that are due back to you.
 - if you would like the system to generate separate events for the tracking of these new documents you are sending.
 - if you would like the system to also print mailing labels.
 - if you would like the system to use the Patient File; this speeds up processing if you are only printing one or a small range of patients.
 - to reload label buckets in Noble*Labels with label information from this list of patients. If you click this option, the system will ask you if you want to clear the label buckets in Noble*Labels first or just add to what's there. Then it fills the Labels Bucket in Noble*Labels with the information from this list of patients.
 - to evaluate default conditions. This will further limit the events from which the list is generated by filtering them with the Default Conditions you set up in Setup Options.
5. Click OK. The system will send the output directly to the printer or ask you to select the output destination (e.g., screen or printer) by displaying the Report Destination Window.

When printing is complete, the system prints any additional documents you might have requested that are related to the events. It also generates events as requested to track these documents. The system then returns you to the Noble*Tracker Main Window.

Lists: Event Type History

Noble*Tracker allows you generate a report that identifies the event history for a range of events and patients.

To generate the event type history report list:

1. Choose the Event Type History command from the Lists menu. The system displays the Event History Report Window.

The screenshot shows the 'Event History Report' dialog box. It features three main sections for filtering data. The top section, labeled 'EVENT TYPES', has tabs for 'ALL', 'One', and 'Range'. The 'ALL' tab is active, and the text field below it contains '10MON - 10 month'. The middle section, labeled 'PATIENTS', also has 'ALL', 'One', and 'Range' tabs, with 'ALL' selected. The text field below it contains 'INCLUDE ALL PATIENTS'. The bottom section, labeled 'Date Sent', has two date input fields: '01/01/1900' and '08/07/2001', along with 'All' and 'Today' buttons. Below these are several checkboxes for report options: 'Print Documents for the Patients listed on this Report', 'Create event to track documents', 'Print Mailing Labels for the Patients listed on this Report', 'Use Patient File to Create Report (May be faster for individual and small ranges of patients)', 'Reload Label Bucket', and 'Evaluate Default Conditions'. At the very bottom are 'Print' and 'Cancel' buttons.

2. Narrow down the events from which the list is generated by selecting the event types and patients for the events that you want to include. You must select all, one, or a range of items for each of these criterion.

To select all of the items for the criterion: Click on the All tab for the criterion. For example, if you want to include all of the event types, click on the All tab.

To select one item for the criterion: Click on the One tab for the criterion, and then select your one item choice from the drop-down list or by pressing the Magnifying Glass button.

To select a range of items for the criterion: Click on the Range tab for the criterion. Enter the beginning item for the range from the first drop-down list and the ending item for the range from the second drop-down list. You can also select the starting or ending item using the Magnifying Glass button. Click in the field for which you want to make a choice, press the Magnifying Glass button, click on your choice in the window that appears, and then press the Select button.

You may also limit the selection by choosing a specific patient type.

3. You may also further limit the events from which the list is generated by selecting a date range. Only those events with the Date Sent between the dates you choose will be selected for the list. You may also click the Today button or the All button to select the dates.

4. You may also choose the following options. Click the checkbox:
 - if you would like the documents to be printed again for the events you have selected. This may be a good idea if you expect the patient might have lost the documents that are due back to you.
 - if you would like the system to generate separate events for the tracking of these new documents you are sending.
 - if you would like the system to also print mailing labels.
 - if you would like the system to use the Patient File; this speeds up processing if you are only printing one or a small range of patients.
 - if you would like the system to report on only the most recent event of the same type.
 - to reload label buckets in Noble*Labels with label information from this list of patients. If you click this option, the system will ask you if you want to clear the label buckets in Noble*Labels first or just add to what's there. Then it fills the Labels Bucket in Noble*Labels with the information from this list of patients.
 - to evaluate default conditions. This will further limit the events from which the list is generated by filtering them with the Default Conditions you set up in Setup Options.
5. Click OK. The system will send the output directly to the printer or ask you to select the output destination (e.g., screen or printer) by displaying the Report Destination Window.

When printing is complete, the system prints any additional documents you might have requested that are related to the events. It also generates events as requested to track these documents. The system then returns you to the Noble*Tracker Main Window.

4 Utility

Utility functionality provides various support utilities for Noble*Tracker.

You can access Utility functionality from the Utility menu in the Noble*Tracker Main Window.

All of the functions are listed below.

Menu Command

Reprint Current Events Document

Reprint Current Events Label

Undo Most Recent Event Creation

Purge Event History

Date Change Utility

Event Types

Import Events

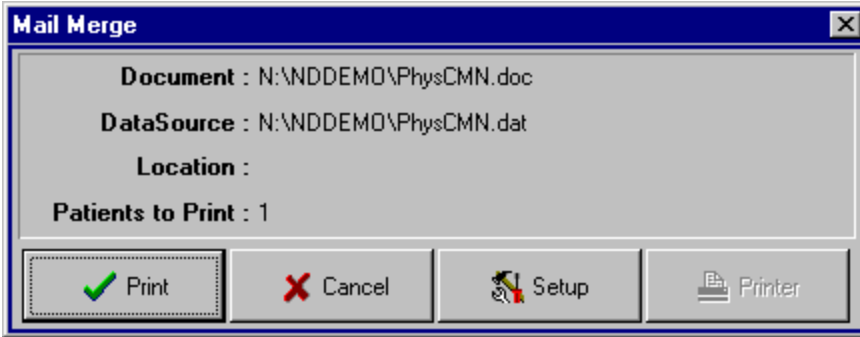
Setup Options

Utility: Reprint Current Events Document

Noble*Tracker allows you to reprint the documents related to a specific Event.

To reprint the documents for an event:

1. Select the event in the Noble*Tracker main window by clicking on the proper Patient and then clicking on the Event. Then choose the Reprint Current Event's Document command from the Utilities menu. The system displays the Mail Merge Window, listing the documents you set up when you created the Event Type.



2. Click Print. The system will send the output directly to the printer or ask you to select the output destination (e.g., screen or printer) by displaying the Report Destination Window.

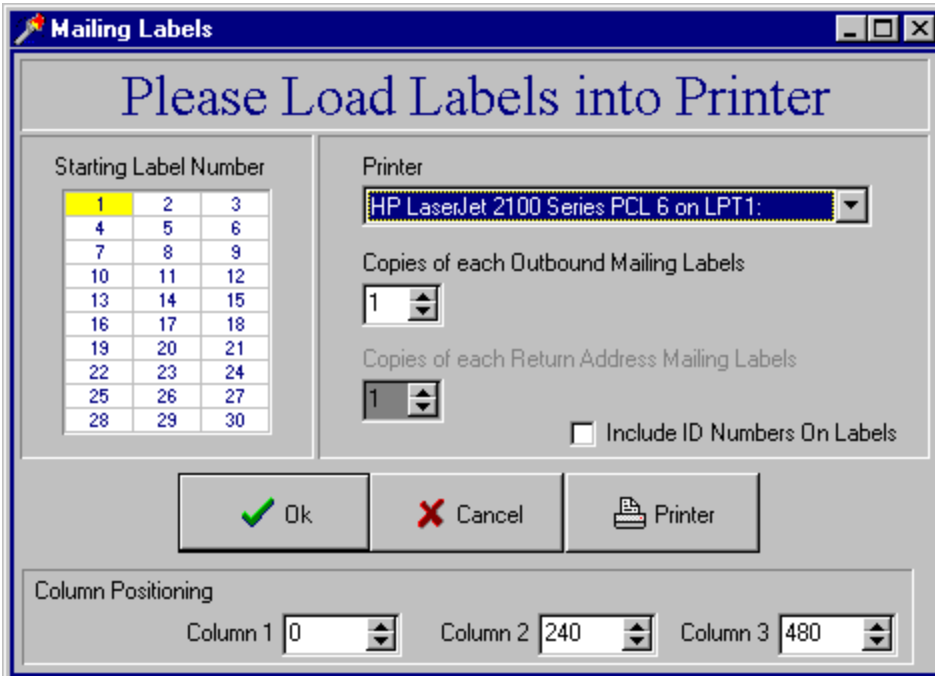
When printing is complete, the system returns you to the Noble*Tracker Main Window.

Utility: Reprint Current Events Label

Noble*Tracker allows you to reprint labels for the documents related to a specific Event.

To reprint a document's labels for an event:

1. Select the event in the Noble*Tracker main window by clicking on the proper Patient and clicking on the Event. Then choose the Reprint Current Event's Labels command from the Utilities menu. The system displays the Mailing Labels Window.



- Put the appropriate paper in the printer and select the number of copies.

Identify the position of the label on the page where you would like printing to begin by clicking on a location or selecting the label number.

If necessary, adjust the vertical or horizontal positioning of the labels by selecting an adjustment number. Numbers represent 1/300th of an inch.

Click OK. The system will send the output directly to the printer or ask you to select the output destination (e.g., screen or printer) by displaying the Report Destination Window.

When printing is complete, the system returns you to the Noble*Tracker Main Window.

Utility: Undo Most Recent Event Creation

Noble*Tracker allows you to undo the events you have created, removing them from the system. Each individual event or batch of events can be "uncreated;" you may uncreate all the way back to your original Noble*Tracker event.

To undo event creation:

- From the Utilities menu in the Noble*Tracker main window, choose the Undo Most Recent Event Creation command. The system asks you to confirm the uncreate.
- Click Yes; the system displays the events that will be removed.



- Click OK to remove; the system removes the listed events from Noble*Tracker.

Utility: Purge Event History

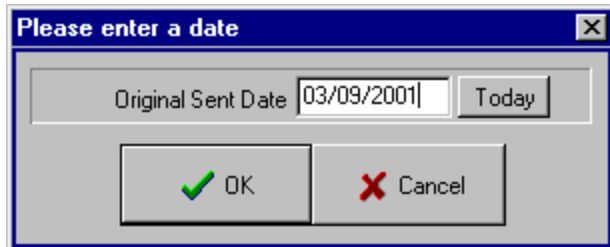
Not Yet Implemented.

Utility: Date Change Utility

Noble*Tracker allows you to change the Sent Date for all events in the system from one date to another.

To change sent date:

1. From the Utilities menu in the Noble*Tracker main window, choose the Date Change Utility command. The system displays the Please Enter A Date Window.



2. Enter the original Sent Date. This is the date that the system will change.
3. Click OK; the system displays the same window, asking you to enter the new Sent Date.



4. Enter the new Sent Date. This is the date that will become the new Sent Date.
5. Click OK; the system asks you to confirm the change. It then identifies the number of events it changed and returns you to the Noble*Tracker Main Window.

Utility: Event Types

Noble*Tracker allows you to add, change or delete Event Types, which are ways to categorize Events.

To manage event types:

1. From the Utilities menu in the Noble*Tracker main window, choose the Event Types command. The system displays the Events Choice List Window.

Event Type Maintenance

Event Type Code **PHYCM1** Description **PHYSICIAN CMN - TYPE 1**

This event type prints documents

Document Filename **N:\NDDemo\C0102a.doc** ... Setup

Mailing Label **D - Physician**

These documents are expected to be returned

Alert me if the documents don't return within **14** days

Events of this type must be repeated on a regular schedule

Events are effective through **6** **Month(s)** of its **Effective Date**

Save Cancel Delete Help

Total Records **8** Last Accessed 03/19/2001

2. To add an event type, click the Add button at the bottom of the screen. To edit or delete an event type, click the Edit button at the bottom of the screen. The system displays the Event Type Maintenance Window.

To add or edit an event type:

3. Enter the Event Type Code and Event Type Description.
4. Click the first checkbox if you want this event type to trigger the printing of documents and labels. Then identify the document you would like the event to trigger by entering its file name or clicking on the browse button to select it. You may also set up the document as a mail merge document by clicking the Setup button and selecting the various fields you would like included.
5. Select the category of mailing labels you would like printed so that you can mail the documents that are triggered by the event. For example, some documents may require patient labels while others will require labels addressed to doctors.
6. Click the second checkbox If you expect the document to be returned after a specific interval; enter the interval. For example, you might expect a log book to be returned in 180 days.
7. Click the third checkbox if the event type is one that has a set duration (e.g., six months) and is repeated (e.g., CMNs). Select the number of days or months and identify whether the event becomes effective at its Sent Date or its Effective Date. The interval identified here will drive Repeat Events.

- Click Save; the system saves the event type and returns you to the Noble*Tracker Main Window.

To delete an event type:

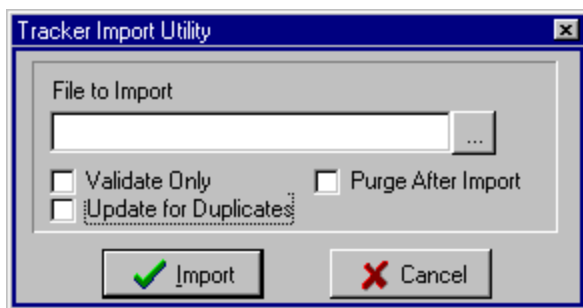
- Click Delete; the system asks you to confirm the delete and then deletes the event type and returns you to the Noble*Tracker Main Window.

Utility: Import Events

Noble*Tracker allows you to import events from a text file.

To import events:

- From the Utilities menu in the Noble*Tracker main window, choose the Import Events command. The system displays the Tracker Import Utility Window.



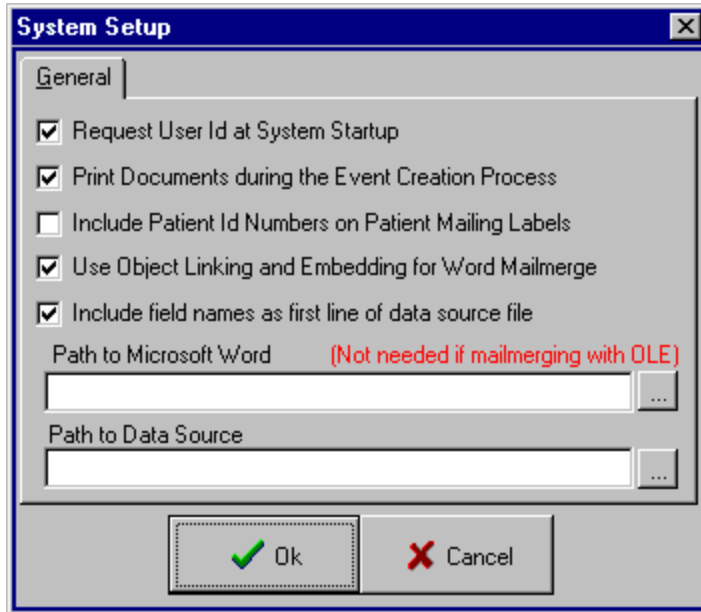
- Enter the name of the file to import or click the browse button and select it from the Windows Open dialog.
- You may also click the checkbox to:
 - Validate the import file; this will cause the error-checking procedure to run without actually importing the file.
 - Update for duplicates; this will ignore duplicates if there already is an event in Noble*Tracker exactly like the one being imported.
 - Purge the import file after it has been imported.
- Click the Import button; the system validates the data in the import file and prints an error report if it finds problems. Then, if requested, it imports the events into Noble*Tracker and returns you to the Noble*Tracker Main Window.

Utility: Setup Options

Noble*Tracker allows you to control and change several of your system options, set default condition filters for Batch Event Creation, and select the language.

To change the system setup options:

1. From the Utilities menu in the Noble*Tracker main window, choose the Setup Options command and then choose System Setup. The system displays the System Setup Window.

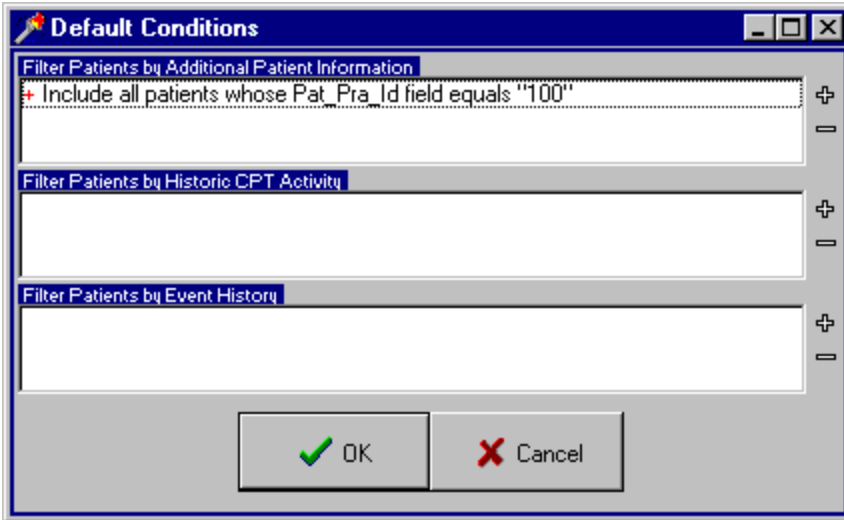


2. You can enable certain system options by checking the appropriate check box. You can:
 - Cause the system to request a user ID before starting the software.
 - Print documents related to an event during the event creation process.
 - Include Patient ID numbers on patient mailing labels.
 - Use Object Linking and Embedding for Word mail merge. If Word does not automatically launch, clear the checkbox and then click the browse button to locate Word. The location of the datasource directory should always be C:\My Documents. This is where the datasource is created to do the mail merge with Word.
 - Include field names as the first line of the data source file.
3. Click OK; the system returns you to the Noble*Tracker main window.

To set up default condition filters:

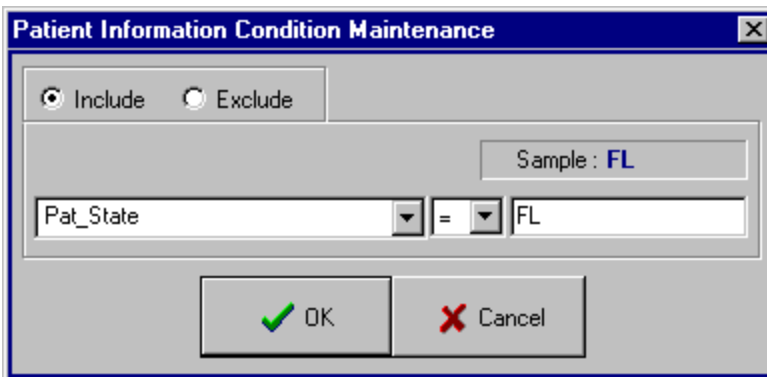
In Batch Event Creation, you may narrow down the transactions from which events are generated by selecting the providers, insurance companies, and patients for the transactions that you want to include. You may also further limit the transactions from which the events are generated by filtering using patient information. And you can permanently set up filters ahead of time. Filters you add or delete during Batch Event Creation will only persist for the current set of events you are creating but filters you set up here will exist for all event creations until you delete them.

- From the Utilities menu in the Noble*Tracker main window, choose the Setup Options command and then choose Default Conditions. The system displays the Default Conditions Window.



- You may add, change, or delete conditions for the filters.
 - To add a filter, click the plus sign next to the filter you would like to use or right-click in the filter's box and choose the Add Condition option. The system presents the window for the filter you chose.
 - To edit a filter, right-click in the filter's box and choose the Edit Condition option. The system presents the window for the filter you chose.
 - To delete a filter, click the minus sign next to the filter you would like to use or right-click in the filter's box and choose the Delete Condition option. The system deletes the filter.
- Add or edit the filter.

Patient Information:



Click whether you would like to include or exclude information based on the filter.

Create the filter by selecting a patient field from the drop-down menu, selecting an operator (e.g., equal to, less than), and entering the value. In the example above, only patients from the state of Florida will be included, because you created a condition that says "Include all patients whose Pat_State equals FL."

Historic CPT Activity:

The dialog box is titled "Historic CPT Activity Condition Maintenance". It features two radio buttons at the top: "Include" (selected) and "Exclude". Below this, the text "ALL PATIENTS WHO HAD" is followed by a dropdown menu containing "A1234 - HOSPITAL BED" and a search icon. Underneath, the text "ACTIVITY BETWEEN" is followed by two date input fields, both containing "08/10/2001", and the word "AND" between them. To the right of the date fields are two buttons: "All" and "Today". At the bottom of the dialog are two buttons: "OK" with a green checkmark icon and "Cancel" with a red X icon.

Click whether you would like to include or exclude information based on the filter.

Create the filter by selecting a CPT Code from the drop-down menu and entering the activity date range.

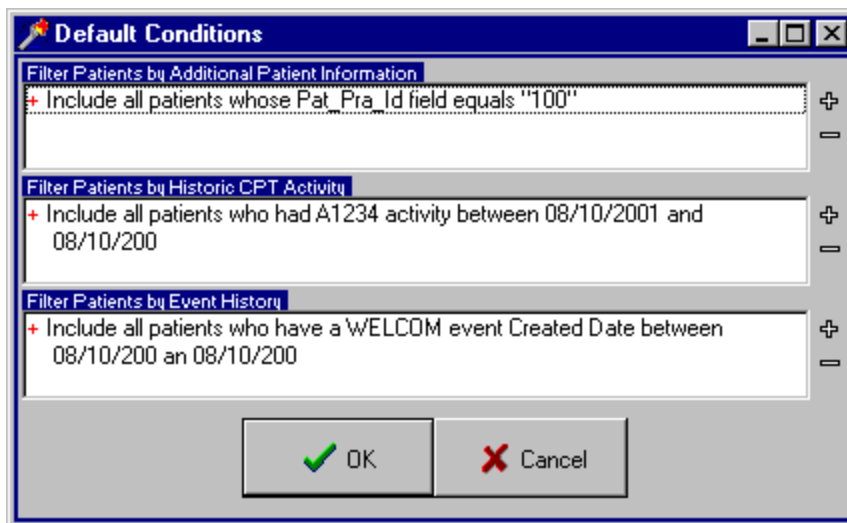
Events:

The dialog box is titled "Event Condition Maintenance". It features two radio buttons at the top: "Include" (selected) and "Exclude". Below this, the text "ALL PATIENTS WHO HAVE A" is followed by a dropdown menu containing "WELCOM - WELCOME LETT" and a search icon. Underneath, the text "EVENT" is followed by a dropdown menu containing "CREATED DATE" and the word "BETWEEN". Below the event dropdown are two date input fields, both containing "08/10/2001", and the word "AND" between them. To the right of the date fields are two buttons: "All" and "Today". At the bottom of the dialog are two buttons: "OK" with a green checkmark icon and "Cancel" with a red X icon.

Click whether you would like to include or exclude information based on the filter.

Create the filter by selecting an event type from the drop-down menu, selecting the kind of event date, and entering the date range.

- Click OK; the system returns you to the Default Conditions screen, with the filters displayed.



- Click OK; the system returns you to the Noble*Tracker main window.

To change the language:

- From the Utilities menu in the Noble*Tracker main window, choose the Setup Options command and then choose either English or Spanish.

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