

Therapist Traveler 7.5

Quick Start Guide

**Practice
Management Tools
For the Successful
Therapist**



Congratulations on your purchase of Therapist Traveler®!

As a Therapist Traveler user, you will be enjoying NetSmart's PDA add-on tool for Therapist Helper.

The Quick Start Guide is designed to help you install, set up, and begin using Therapist Traveler.



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How to Use This Guide

This guide is for users of Helper practice management software who plan to use Therapist Traveler as a PDA add-on. This guide covers the basic setup and operating procedures. To help keep you on track, we have used a number of conventions throughout the Quick Start Guide:

Bolded Words	Typically, a word that is capitalized and bolded is a command you act on; it could be a button (e.g., click the Options button), or a keyboard command (e.g., press F1 for Help).
 TECH TIP	Tech Tips are designed to help you avoid common pitfalls or take advantage of special features. They appear in boxes accompanied by an information icon.
 Important	Important comments and suggestions appear in gray boxes accompanied by an exclamation point icon. Often these comments are critical in nature; please take note of them.
Pipe symbol () used in menu and screen sequence commands	When we instruct you through a sequence of actions involving menus or buttons, we use the pipe symbol () as a shortcut (for example, "Click Options Users... Groups... "). This simply means that you click the Options button and then click Users... and then click Groups...
Mousing	We use standard "mousing" conventions: "click" means to left-click on something (e.g., click Payer); "tap" means to touch to screen of your PDA with a stylus; and so forth.

We encourage you to visit us on the web at www.helper.com. On our web site you will find FAQs, technical advisories, technical tips and more.

Technical Support Resources

If you cannot find the answer to your question in this manual, the following help resources are available:

- **Web:** You can refer to the support section of our web site for answers to Frequently Asked Questions (FAQs).



- Email: With your current maintenance contract, you can email your questions to Customer Support at any time to receive help. Go to www.helper.com, scroll to the bottom of the page and click on the link to My Helper. Once you log in select the Technical Support link and follow the on screen instructions.
- Telephone: If you need immediate assistance, you may call technical support at (781) 937-0080 from 9:00 am to 5:00 pm Monday through Friday, Eastern Standard Time.

System Requirements

Therapist Traveler requires Palm OS version 3.5 or greater.

To use Therapist Traveler with Helper, make sure your computer system has what it needs to effectively run the software. You can view the system requirements at :

http://www.helper.com/documents/helper/system_requirements.pdf.

If you have any questions about these requirements, please contact your sales representative.



Important: In addition, you need to have a current Therapist Helper maintenance contract. To determine your maintenance status, or for information on maintenance contracts, please call the Therapist Helper Sales department at (800) -3-HELPER.



INSTALLATION

You can install Therapist Traveler using your Helper installation CD or an installation file you have downloaded from our website.

To install from CD

- 1 Place the CD-ROM in the CD-ROM drive.
- 2 If the *Product Installation* screen displays, skip to **step 5**. If not, at the Windows desktop double-click **My Computer**.
- 3 Double-click the icon for your CD-ROM drive.
- 4 Double-click **cdsetup.exe**.
- 5 Click **Additional Products and Services**.
- 6 Click **Therapist Traveler**.
- 7 Follow the on-screen instructions in the Installation Wizard.
- 8 At the PDA Install Tool screen, click **Done**.
- 9 At the prompt, *Next time you perform a HotSync...* click **OK**.
- 10 Read the *Installing Therapist Traveler to your PDA* section below.

To install from the Internet

- 1 Download the Therapist Traveler installation file (**traveler75.exe**) from the **Downloads** section of www.helper.com to your computer's desktop.
- 2 Double-click the **traveler75.exe** file.
- 3 Follow the on-screen instructions in the Installation Wizard.
- 4 At the PDA Install Tool screen, click **Done**.
- 5 At the prompt, *Next time you perform a HotSync...* click **OK**.
- 6 Read the *Installing Therapist Traveler to your PDA* section below.



Installing Therapist Traveler to Your PDA

Now that Therapist Traveler is installed on your computer, you need to install it on your PDA and download your Therapist Helper data to the PDA.

Installing the Program

To install Therapist Traveler on your PDA, simply insert the PDA in its cradle and press the HotSync button to synchronize it with your computer. Therapist Traveler installs on your PDA as part of the HotSync operation.

Syncing Therapist Helper Data to Therapist Traveler

After installing Therapist Traveler, the next step is to download data to your Therapist Traveler on your PDA. To do this, tap the HotSync button a *second time* on your PDA.

Upgrading to Therapist Traveler 7.5

- 1** Delete the current Therapist Traveler application from your PDA. To do this:
 - a. From the PDA, select the App menu then select Delete.
 - b. Scroll down to Therapist Traveler.
 - c. Highlight Traveler.
 - d. Tap the Delete button.
 - e. Tap the Yes button to delete the application.
- 2** Install Therapist Traveler 7.5 using the appropriate installation instructions above.
- 3** Install Therapist Traveler to your PDA by syncing your PDA.
- 4** Open Therapist Traveler on your PDA. You will get the message: "Welcome to Therapist Traveler... You must hotsync your palm..."
- 5** Sync your Therapist Helper data into Therapist Traveler by syncing your PDA a second time.

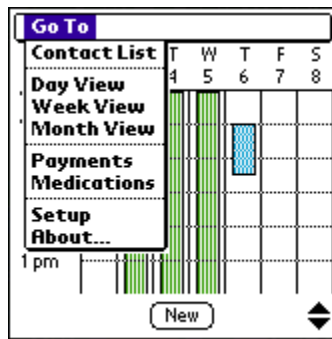


Please Note: If you open Therapist Traveler after Step 2 above without completing Step 3, your Therapist Traveler data will appear as a mishmash of letters and symbols. Please complete Step 3.



NAVIGATION

You can navigate within Therapist Traveler using the **Go To** drop down menu. You can access the **Go To** drop down menu by tapping the upper left hand corner of Therapist Traveler.



The following items appear in the **Go To** menu:

- **Contact List** – a list of all contacts in your Therapist Traveler.
- **Day View** – all scheduled events for a given day shown in list form.
- **Week View** – all scheduled events for a given week shown graphically as blocks of time.
- **Month View** – a “day picker” that shows the current month.
- **Payments** – a list of payments that you have entered into Therapist Traveler since your last hot sync.
- **Medications** – a list of medications that have been synced into Therapist Traveler or that you have entered into Therapist Traveler.
- **Setup** – a screen that allows you to customize Therapist Traveler’s features and appearance.
- **About** – information such as version about Therapist Traveler.



SETUP

The Therapist Traveler Setup Screen allows you to customize the features and appearance of your Therapist Traveler. There are four main sections of the Setup Screen: Setup, Security, Options, and Color/Patterns. To access the Therapist Traveler Setup screen tap **Setup** in the **Go To** menu.



The Setup screen has two fields (**Active Therapist** and **Therapist to hot-sync**) and three buttons. Each is discussed below.

Active Therapist field – This field is the therapist that has been synced into Therapist Traveler from Therapist Helper. This therapist's *patients* and *scheduled activities* will be synced into Therapist Traveler. The *password* that is entered using the **Security** section of the **Setup** screen will apply to this therapist only.

Therapist to hot-sync field – The therapist that will be hot-synced from Therapist Helper into Therapist Traveler the next time you hot-sync your PDA. If you change the selection in this field and the Therapist you select has a password associated with her name, you will be asked to enter the therapist's password.



Security Passwords

Therapist Traveler can be password protected. Tap the **Security** button on the **Main Setup** window to access the Therapist Traveler **Security** screen.



Each therapist that appears in the **Therapist to hot-sync** field can have his/her own password. The **Security** screen only modifies the password settings for the Active Therapist. The **Password** field will either list "Assigned" or "Unassigned". "Assigned" indicates that a password has been assigned to the **Active Therapist**. "Unassigned" indicates that a password has not been assigned to the **Active Therapist**.



Please Note: If a password is assigned to a therapist, you will be prompted for the password every time you enter Therapist Traveler including when the PDA turns itself off to save power.

To set a password:

- 1 Tap the field next to **Password** on the **Security** screen.





- 2 Enter the password you would like and tap **OK**.
- 3 Re-enter the password you would like to confirm and tap **OK**.
- 4 You will return to the **Security** screen and “Assigned” will appear in the **Password** field.



- Setting a password only sets the password for the therapist appearing in the **Active Therapist** field.

To clear a password:

- 1 Tap the field next to **Password** on the **Security** screen.



- 2 Do not enter anything and tap **OK**.
- 3 Do not enter anything again and tap **OK**.



- 4 You will return to the **Security** screen and “Unassigned” will appear in the **Password** field.



- Clearing a password only clears the password for the therapist appearing in the **Active Therapist** field.

Lock & Turn Off...

Taping the **Lock & Turn Off** button will close Therapist Traveler. The next time that you try to open Therapist Traveler, you will be prompted for the password of the **Active Therapist**.

Lost Passwords

If you lose/forget your Therapist Traveler password, and cannot get back into Therapist Traveler when you are prompted for a password, tap the **Lost Password** button on the Log In screen. Deleting your password will remove all of your Therapist Traveler data until the next hotsync.



Options

Tap the **Options** button on the Main Setup screen to enter the Therapist Traveler Options Screen.

Options

HotSync Scheduler Records
From: ▼ 2 Weeks Before Today.
To: ▼ 9 Weeks after today.

HotSync Medication Records
From: ▼ 2 Weeks Before Today.
To: ▼ 1 Weeks after today.

Enable Traveler Options:

Payments

Medications

Done

This screen allows you to specify the date range for which you would like to hotsync records and the Therapist Traveler options you would like to have enabled.

HotSync Scheduler Records

The **From** and **To** fields allow you to pick a date range between which you will sync scheduler records into Therapist Traveler. Records that fall outside of this date range will not be synced into Therapist Traveler.

HotSync Medication Records

The **From** and **To** fields allow you to pick a date range between which you will sync medication records into Therapist Traveler. Records that fall outside of this date range will not be synced into Therapist Traveler.

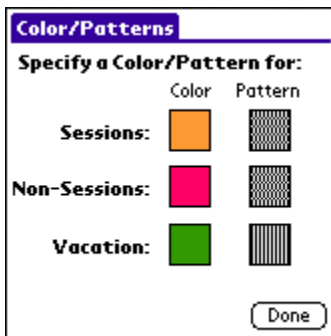
Enable Therapist Traveler Options

- To enable Therapist Traveler's Payment feature check the box next to **Payments**.
- To enable Therapist Traveler's Medications feature check the box next to **Medications**.



Colors/Patterns

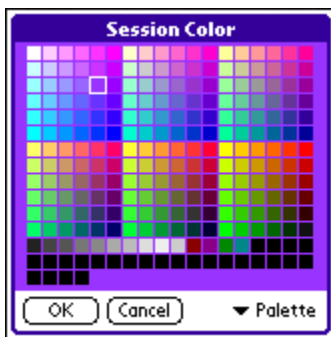
Tap the **Colors/Patterns** button on the Main Setup screen to enter the Therapist Traveler Colors/Patterns screen.



This screen allows you to select different colors and patterns for the three types of scheduled events: Sessions, Non-Sessions and Vacation. The colors and patterns will appear on the day and week views in Therapist Travelers Scheduler section.

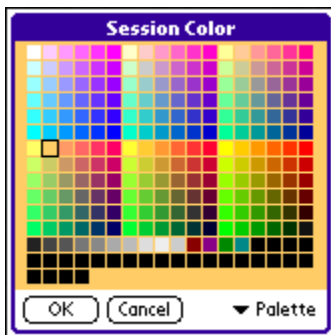
To set a color or pattern:

- 1 Tap the color or pattern you would like to set.

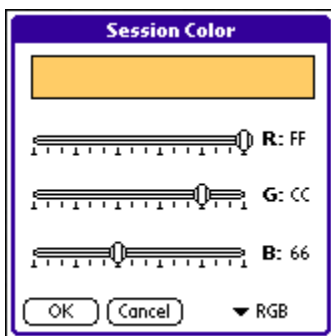




- 2 Select the color or pattern from the color or pattern picker. The background color changes according to your current selection.



- 3 Tap **OK**.
- 4 To create a custom color, tap the **Palette** drop-down arrow then select **RGB**.



- 5 Use the **Red**, **Green**, and **Blue** slide bars to create a custom color then tap **OK**.
- 6 When you have set the colors and patterns you would like to use tap **Done**.



CONTACT LIST

The Therapist Traveler contact list shows all of the contacts that have been synced from Therapist Helper into Therapist Traveler. To access the Contact List, tap **Contact List** on the **Go To** menu.



The following types of contacts are synced into Therapist Traveler:

- **Therapist** – All of the therapists that appear in Therapist Helper’s Therapist Library.
- **Patient** – All *active* patients that have the Therapist Traveler **Active Therapist** as their Therapist Helper *Primary Therapist* or have a session scheduled for the **Active Therapist** between the dates specified in the *HotSync Scheduler Records* field in Therapist Traveler’s **Options** screen
- **Responsible Party** – All primary and secondary responsible parties that have been entered into Therapist Helper for patients that fit the above description.
- **Insurance** – All insurance companies that appear in Therapist Helper’s Insurance Company Library.
- **Lawyer** – All lawyers that appear in Therapist Helper’s Lawyers Library.
- **Referral** – All referrals that appear in Therapist Helper’s Referring Sources Library.

Filtering the Contact List

You can filter the type of contact that appears in Therapist Traveler’s Contact List by making a selection in the drop down list that appears in the upper right



hand corner of Therapist Traveler's Contact List. By default, "All" is selected and the contact list shows all of the contacts that have been synced into Therapist Traveler. To filter the contact list:

- 1 Tap the drop down list at the top right of the Therapist Traveler Contact List.



- 2 Select the type of contact you would like to display from the Contact List.

Searching the Contact List

You can search the Contact List by using the look up field (represented by a question mark) at the bottom of the Contact List. To search the Contact List:

- 1 Tap into the search area next to the ?.
- 2 Enter the first letter of the last name or company name for which you are looking.
- 3 The focus of the Contact List will jump to the closest matching contact.

Adding a Contact

You can add a Patient, Insurance Company, Lawyer, or Referral contact to Therapist Traveler. Any contact that you add to Therapist Traveler will be added to Therapist Helper when you sync your PDA. To add a contact to Therapist Traveler:



- 1 Tap the **New** button at the bottom of the Contact List.

Contact Details ▼ Patient

Last

First MI

Addr

Addr2

City

State Zip

Work

Home

Cell

Done Cancel ↑

- 2 Select the type of contact you would like to enter from the drop down list at the top right of the Contact Details screen.

Contact Details Insurance
Lawyer
Patient
Referral

Last

First MI

Addr

Addr2

City

State Zip

Work

Home

Cell

Done Cancel ↑

- 3 Enter the contact information.
- 4 Tap the **Done** button to save your work.

Editing a Contact

You can edit the information that appears in the Therapist Traveler contact list. Information that you edit in Therapist Traveler will be used to update your Therapist Helper database when you sync your PDA. To edit a contact in Therapist Traveler:



- 1 Tap the name of the contact you would like to edit.

The screenshot shows a 'Contact Details' screen for an insurance contact. The title bar has 'Contact Details' on the left and 'Insurance' on the right. The contact name is 'Comp UNITED BEHAVIORAL HEALTH-N'. Below this are fields for 'Addr' (PO BOX 182398), 'Addr2' (Route OH019-0080), 'City' (COLUMBUS), 'State' (OH), 'Zip' (43218-2398), 'Phone' ((888)329-0495 X5429), and 'Fax'. At the bottom, there are 'Done' and 'Cancel' buttons, and a small upward-pointing arrow icon.

- 2 Update the appropriate information in the Contact Details screen.
- 3 Tap the **Done** button to save your changes.

Deleting a Contact

You can delete a contact from Therapist Traveler only if the contact has been added into Therapist Traveler since the last time you synced your PDA. To delete a contact from Therapist Traveler:

- 1 Tap the name of the contact you would like to delete.
- 2 Tap the **Delete** button at the bottom of the Contact Details screen.
- 3 Tap the **Delete** button to verify that you would like to delete the contact.

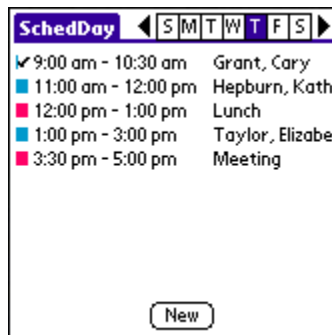


SCHEDULED EVENTS

Therapist Helper syncs all unsaved scheduled sessions, non-session events, and vacations that appear in the Therapist Helper Scheduler for the Therapist Traveler Active Therapist into Therapist Traveler. These events are also shown in the PDA Date Book.

Day View

The Therapist Traveler Day View shows a list of all scheduled events for a given day for Therapist Traveler's Active Therapist. You can access the Day View by selecting **Day View** from the **Go To** menu.

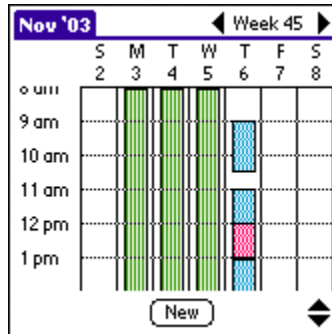


- You can navigate between days of the week by tapping the day of the week at the upper right hand corner of the Day View Screen.
- You can navigate between weeks by tapping the arrows to the right and left of the days of the week icons at the upper right hand corner of the Day View Screen.



Week View

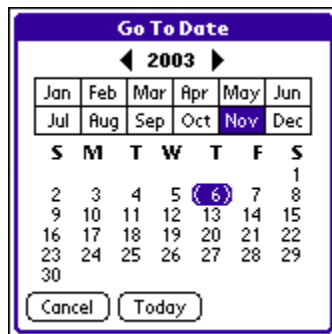
The Therapist Traveler Week View shows a graphical representation of all scheduled events for a given week for Therapist Traveler's Active Therapist. You can access the Week View by selecting **Week View** from the **Go To** menu.



- You can navigate between weeks by tapping the arrows at the top right hand corner of the Week View screen.
- You can jump to the Therapist Traveler Day View by tapping any day of the week on the Week View screen.

Month View

The Therapist Traveler Month View is a date picker. When you select a date on the Month View screen you will jump directly to that date on the Day View screen. By default, the current day is selected.



- To navigate between years, tap the arrows to the right and left of the year at the top of the Month View.



- To navigate between months, tap a month in the upper portion of the screen.
- To select a day, tap the day of the month to which you would like to jump.

Adding an Event

You can add an event in Therapist Traveler from the Day and Week View screens. The event that you add will appear in Therapist Helper the next time you sync your PDA. To add an event:

- 1 Tap the **New** button at the bottom of the Day or Week View screens.

The screenshot shows the 'Event Details' screen with a dropdown menu open for 'Session'. The fields are: Service: Office Visit, Status: Kept and charged for, Date: 11/6/03, Time: 9:00 am - 9:00 am, Duration: 0 Minutes, Patient: No Patient, Complete: . Buttons for 'Done' and 'Cancel' are at the bottom.

- 2 To change the type of event you are entering (Session, Non-Session, or Vacation) select the event type from the drop down list in the upper right hand corner of the Event Details screen.

The screenshot shows the 'Event Details' screen with a dropdown menu open for 'Non-Session'. The fields are: Service: Non-Session, Status: Kept and charged for, Date: 11/6/03, Time: 9:00 am - 9:00 am, Duration: 0 Minutes, Patient: No Patient, Complete: . Buttons for 'Done' and 'Cancel' are at the bottom.

- 3 Enter the appropriate information in the Event Details screen.
- 4 Tap the **Done** button to save your work.



Editing an Event

You can edit an event that appears in Therapist Traveler from the Day View screen only. The information that you edit will appear in Therapist Helper the next time you sync your PDA. To edit an event:

- 1 Tap the event you would like to edit on the Day View screen.

Event Details		Session
Service	▼	Non-Session Vacation
Status	▼	Kept and charged for
Date		11/6/03
Time		9:00 am - 9:00 am
Duration	0	Minutes
Patient		No Patient
Complete	<input type="checkbox"/>	
Done		Cancel

- 2 Update the appropriate information.
- 3 Tap the **Done** button to save your changes.



Please Note: You cannot edit a Session that has been saved in Therapist Helper.

Deleting an Event

You can delete an event from Therapist Traveler only if the event has been added into Therapist Traveler since the last time you synced your PDA. To delete an event from Therapist Traveler:

- 1 In the Day View, tap the event you would like to delete.



- 2 Tap the **Delete** button at the bottom of the Event Details screen.

The screenshot shows the 'Event Details' screen with a 'Delete' dialog box overlaid. The dialog box has a purple header with a question mark icon and the text 'Delete this item?'. Below the header are two buttons: 'Delete' and 'Cancel'.

Event Details	▼ Session
Service	▼ Family Psychotherapy
Status	▼ Kept and charged for
Date	11/6/03
Time	1:00 pm - 3:00 pm
Delete	
Delete this item?	
Delete Cancel	

- 3 Tap the **Delete** button to verify that you would like to delete the event.

Completing an Event

Using Therapist Traveler you can complete both session and non-session events.

- When you mark a session event as complete in Therapist Traveler it will be saved as a Session in Therapist Helper the next time that you sync your PDA.
- When you mark a non-session event as complete in Therapist Traveler it will mark the event as a completed non-session event in Therapist Helper's Scheduler the next time you sync your PDA.

- 1 Open the Day View.
- 2 Tap the event you would like to mark as complete.
- 3 Tap the **Completed** check box so that a check mark appears.

The screenshot shows the 'Event Details' screen with the 'Complete' checkbox checked. The dialog box has a purple header with a question mark icon and the text 'Delete this item?'. Below the header are three buttons: 'Done', 'Cancel', and 'Delete'.

Event Details	▼ Session
Service	▼ Office Visit
Status	▼ Kept and charged for
Date	11/6/03
Time	9:00 am - 10:30 am
Duration	90 Minutes
Patient	Grant, Cary
Complete	<input checked="" type="checkbox"/>
Done Cancel Delete	



- 4 Tap the **Done** button to save your changes.

Viewing Events in the PDA Date Book

Session, non-session and vacation events that appear in Therapist Traveler are now synced into the PDA Date Book as well as into Therapist Traveler. When viewing your Therapist Traveler information in the PDA Date Book, please keep in mind the following information:

- Therapist Traveler scheduling records are placed into the PDA Date Book upon opening Therapist Traveler for the first time after a HotSync. To view Therapist Traveler scheduling records in the PDA Date Book, you must first open Therapist Traveler.
- Editing a Therapist Traveler event in the PDA Date Book will not modify the record in Therapist Traveler or in Therapist Helper.
- Therapist Traveler events that appear in the PDA Date Book will not appear on your PC's PDA Desktop or in MS Outlook.
- To safeguard Protected Health Information, patient names are **not** shown in the PDA Date Book for sessions. Session events are noted as **Session** in the PDA Date Book along with the event's date and time. Saved Sessions are noted as **Completed Session** in the PDA Date Book.
- Non-Session events are listed in the PDA Date Book as the Therapist Helper **Type of Appointment** field along with the session's date and time.
- Vacation events are listed in the PDA Date book as **Vacation** along with the event's date and time.
- Each Therapist Traveler scheduled event that appears in the PDA Date Book has a note associated with it. Therapist Traveler uses these notes to keep track of the Date Book entries created by Therapist Traveler. You should not modify these notes.



PAYMENTS

Therapist Traveler allows you to enter payments and sync them into Therapist Helper. Therapist Helper does not sync any payment records into Therapist Traveler. Once a payment has been synced from Therapist Traveler into Therapist Helper, it no longer appears within Therapist Traveler. To view the Payments List tap **Payments** in the **Go To** menu.



Note: In order to access the Payments option you must enable it in **Setup | Options**.

Filter Payment List

Therapist Traveler allows you to filter the payments that appear in the Payments list by the name of the patient with whom the payment is associated. You can filter the payments that appear in the Payment List by making a selection in the drop down list that appears in the upper right corner of the list. By default, “All” is selected and the Payments List shows all of the payments that have been entered into Therapist Traveler. To filter the Payments List:



- 1 Tap the drop down list at the top right of the Payments List.

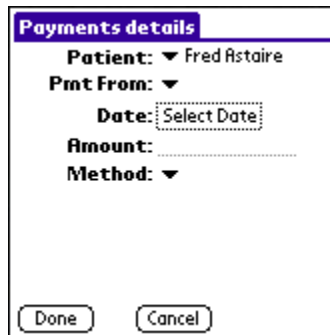


- 2 Select the name of the patient for whom you would like to filter.

Add Payments

You can add a payment to Therapist Traveler in the following manner:

1. Tap the **New** button at the bottom of the Payments List screen.



- 3 Enter the appropriate information.
 - The **Patient** field contains information on the patient with whom the payment is associated.
 - The **Pmt From** field contains information on the billable party from whom payment was received. Insured parties are listed as the initials of the **Insured's Name** followed by the **Insurance Company**, both of which are drawn from the Insurance Company section of the Therapist Helper Patient Facesheet.
- 4 Tap the **Done** button at the bottom of the Payment Details screen.



Edit Payments

You can edit a payment from Therapist Traveler only if the payment has been added into Therapist Traveler since the last time you synced your PDA. To edit a payment from Therapist Traveler:

- 1 In the Payment List, tap the payment you would like to edit.

The screenshot shows a 'Payments details' dialog box with the following fields:

- Patient: ▼ Fred Astaire
- Pmt From: ▼ Fred Astaire
- Date: 11/7/03
- Amount: 75.00
- Method: ▼ Cash
- Check #:

At the bottom of the dialog are three buttons: Done, Cancel, and Delete.

- 2 Update the appropriate information.
- 3 Tap the **Done** button to save your changes.

Delete Payments

You can delete a payment from Therapist Traveler only if the payment has been added into Therapist Traveler since the last time you synced your PDA. To delete a payment from Therapist Traveler:

- 1 In the Payment List, tap the payment you would like to delete.
- 2 Tap the **Delete** button at the bottom of the Payment Details screen.

The screenshot shows the same 'Payments details' dialog box as above, but with a 'Delete' dialog box overlaid on top. The 'Delete' dialog box has a question mark icon and the text 'Delete this item?'. At the bottom of the 'Delete' dialog are two buttons: Delete and Cancel.



- 3 Tap the **Delete** button to verify that you would like to delete the payment.

Syncing Payments

When you sync payments from Therapist Traveler into Therapist Helper:

- 1 The payments that you have entered will be synced into Therapist Helper and will no longer appear in Therapist Traveler.
- 2 If you have payment tracking turned on in Therapist Helper, you will be prompted by Therapist Helper's Payment Tracking screens to associate the payments you have entered into Therapist Traveler with a Therapist Helper session. This will occur during the sync process.

Methods of Payment

The methods of payment that appear in the **Method** field in Therapist Traveler's Payment Detail screen are drawn from Therapist Helper's Methods of Payments Library. To add additional methods of payments into Therapist Traveler, you must add additional methods into Therapist Helper's Methods of Payment library and then sync your PDA.

Credit Card Information

When adding a payment in Therapist Traveler, credit card information can be entered for certain methods of payment. Therapist Traveler determines which methods of payment credit card information can be associated with by looking at the **Method is a Credit Card** field in the Therapist Helper Methods of Payment Library. If this box is checked, credit card fields will appear in Therapist Traveler's Payment Details screen when you select the payment method. If this box is not checked, credit card fields will not appear in Therapist Traveler's Payment Details screen.



MEDICATIONS

Therapist Traveler allows you to sync medication records from Therapist Helper. Medications are synced into Therapist Helper for all of the patients that appear on Contact List and that fall into the date range specified in the Options screen of Therapist Traveler’s Setup section. You can view medications in Therapist Traveler on the Medications List by tapping **Medications** in the **Go To** menu.



Note: In order to access the Medications option you must enable it in **Setup | Options**.

Filter Medications

Therapist Traveler allows you to filter the medications that appear in the Medications List by the name of the patient with whom the medication is associated. You can filter the medications that appear in the Medications List by making a selection in the drop down list that appears in the upper right corner of the list. By default, “All” is selected and the Medications List shows all of the medications that have been synced or entered into Therapist Traveler. To filter the Medications List:



- 1 Tap the drop down list at the top right of the Medications List.

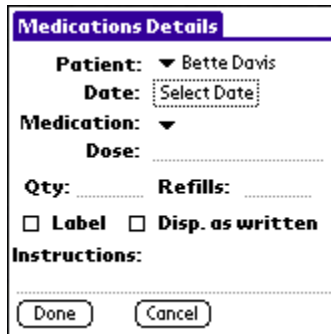


- 2 Select the name of the patient you would like to filter by.

Add Medications

You can add a medication to Therapist Traveler in the following manner:

- 1 Tap the **New** button at the bottom of the Medications List screen.



- 2 Enter the appropriate information.
- 3 Tap the **Done** button at the bottom of the Medication Details screen.

Edit Medications

You can edit the information that appears in the Therapist Traveler medications list. Information that you edit in Therapist Traveler will be used to update your Therapist Helper database when you sync your PDA. To edit a medication in Therapist Traveler:



- 1 In the Medications List, tap the medication you would like to edit.

Medications Details

Patient: ▼ Bette Davis
Date: 11/7/03
Medication: ▼ Prozac
Dose: 20MG

Qty: 10 **Refills:** 1

Label **Disp. as written**

Instructions:
Once a Day

- 2 Update the appropriate information.
- 3 Tap the **Done** button to save your changes.

Delete Medications

You can delete a medication from Therapist Traveler only if the medication has been added into Therapist Traveler since the last time you synced your PDA. To delete a medication from Therapist Traveler:

- 1 Tap the medication you would like to delete.

Medications Details

Patient: ▼ Bette Davis
Date: 11/7/03
Medication: ▼ Prozac
Dose: 20MG

Qty: 60 **Refills:** 1

Delete

- 2 Tap the **Delete** button at the bottom of the Medication Details screen.
- 3 Tap the **Delete** button to verify that you would like to delete the medication.



Medication Pick List

The list of medications that appear in the **Medications** pick list on the Medication Details screen is drawn from Therapist Helper's Library of Medications. To add additional medication types into Therapist Traveler, you must add additional medications into Therapist Helper's Library of Medications and then sync your PDA.