For Health Professional Education

Medatrax, Inc.

Medatrax Users Guide

For Nurse Practitioner Students

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Quick Tip:
Click a link above to jump to that section of the manual

If you have any questions or problems, please feel free to contact us.
Office hours are Monday-Friday 8-9 and Saturday 8-noon Central Time.
After hours support is available; call to schedule.
We welcome the opportunity to assist you.

Contact: Webmaster@medatrax.com
1-800-647-4838

Welcome to Medatrax

We congratulate you on beginning your graduate clinical education program.

When compared to the overall effort each of you will expend in pursuit of your certification, Medatrax will play but a small, however vital part by accurately maintaining your clinical experiences. Medatrax may additionally provide levels of automation in areas of forms, evaluations, soap notes, timekeeping, reporting, alarms and printing your portfolio.

In the coming weeks and months, we will communicate information that may be of interest and may include presentation and training links.

Thank you in advance for the opportunity and privilege to serve each of you. We look forward to assisting you throughout your program.

Sincerely,

David

David L. Oldani - CEO
Medatrax
1-800-647-4838
david@medatrax.com

Chapter 1: My Account

Chapter 1 will teach students proper maintenance of Medatrax software.

Student will learn to:

- ✓ Activate Medatrax account
- ✓ Update username, password, and /or email
- ✓ Manage locations and preceptors (optional)
- ✓ Enter required demographics
- ✓ Enter expiration dates of immunizations, vaccinations, license, and certifications
- ✓ Upload regulatory documents

First Time Users

Initial user name and password will be provided for the first login by the program administrator or sent via email from Medatrax Account Specialist. If user ids have not been received, please contact webmaster@medatrax.com or 1-800-647-4838 x1 to retrieve user Ids.

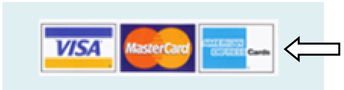
Account Maintenance

- **Activating Your Medatrax account: (optional)**
  For programs that elect students to pay Medatrax fees, the system will ask to activate your Medatrax account:

> **Account Activation**
>
> By activating your account, the billing cycle begins. Activation occurs when a successful login is completed. Medatrax fees are due the same time each month. Medatrax accounts are similar to a phone bill (payment is expected each month regardless of usage). Students may purchase a monthly subscription (due the same time each month) or pay 'nn' months in advance:
> Click here to continue (and establish a payment date of today) or
> Click here to exit.
> **Please note:**
> Medatrax does not store credit card information. All credit card payments are non-refundable. After submitting a credit card payment, wait for a completion message... do not click the submit again or leave the browser page prematurely.

By activating your Medatrax account, users are subscribing to a monthly subscription of Medatrax services and software. Please read Medatrax Terms and Conditions before activating accounts.

- **Making a payment: (optional)**
  Click the credit card icon at the bottom of your home screen



The payment screen below will appear. Select the number of months desired to pay. Payments can be made monthly or pay for several months in advance. Agree to the Terms and Conditions by placing a check in the box and clicking submit.

*Clicking payment history at the bottom of the screen will bring generate Payment history. Right click the page for a receipt of your transactions or contact Medatrax account specialist for an official receipt of payment.

Complete credit card information in spaces provided. Verify amount to be drafted from card and click submit.

Successful payments are indicated as below:

"Payment Successful"

My Account

My Account

- **Updating Email Address**

  Email Address

  My Account > Email – Enter email in box and click update.
  Your email address will not be shared with any third parties for any reason. We take all reasonable precautions to protect your privacy. Please feel free to contact us if you have any concerns.

Update your email address	Back
Email Address:	amy@medatrax.com
	Update Cancel

- **Change Password**

  Password

  My Account > Password: Enter new password and click submit.

New Password:	Recommended minimum number of characters is 8
Confirm New Password:	
	Submit Cancel

- **Change Username**

  User Name

  My Account > Username: Enter new user ID and click update

Change your user name	Back
User Name:	tps889
	Update Cancel

- **Managing Locations & Preceptors: (optional)**

  Manage Locations

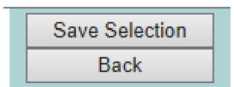
  Manage Preceptors

  My Account > Manage Locations
  My Account > Manage Preceptors

  Identify & save your clinical locations/preceptor information to Medatrax. These will be available on your handheld device as well as time log and other forms.
  If adding a new preceptor and/or location, check the list carefully to avoid duplicate preceptor/location names. Capitalization and punctuation are required for presentation of professional reporting.

Check the box that you wish to display in the drop down during time log and patient entries:

If the desired location or preceptor does not appear, select "Add New Location" or "Add New Preceptor" (once the location or preceptor has been added, repeat steps 3 and 5).
Save the selection. Save is found in the upper right corner of the page:



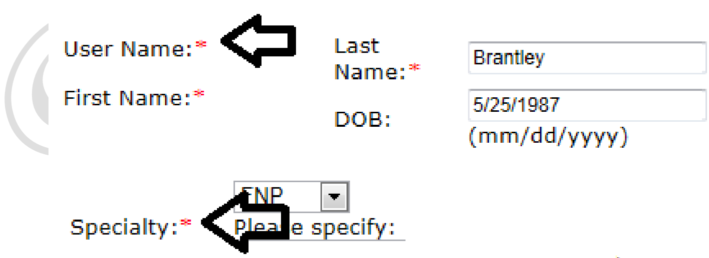
- **Edit Account Information:**

Edit Account Information

My Account > Edit Account Information
Required information: First name, Last name, Specialty.
Medatrax recommends entering the following: phone number or cell phone number.
Leave items that are not applicable blank. If you have requirements for your program, the system will not allow you to navigate to the home page without all requirements being submitted first. Program prerequisites must be completed prior to recording clinical information in Medatrax.

Select the appropriate tabs to update demographics and documents:

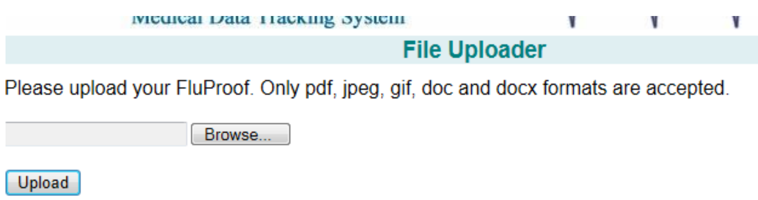
Note: All required fields will be indicated with a red asterisk



- **Uploading documents:**

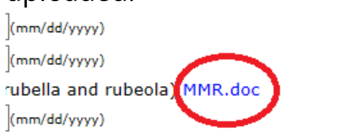
  Enter a date for specific documents. After the date is entered, select *click here to upload*

A new page will open to upload documents. Follow the prompts on the screen and click upload



Once documents have been uploaded, scroll down and click the submit button to refresh the page.

Once the page has refreshed, the "click here to upload" link will present the document uploaded:

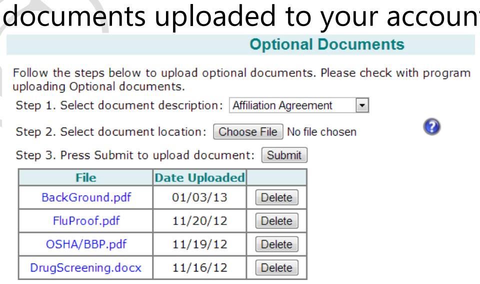


- **Deleting documents:**

To delete a document, please do the following:

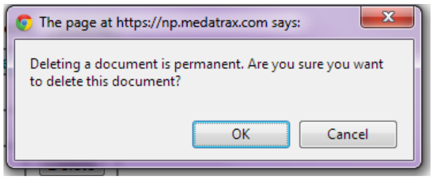
Click the documentation tab

Scroll to the bottom of the page. Here under optional documents you will see a grid of all documents uploaded to your account.



File	Date Uploaded	
BackGround.pdf	01/03/13	Delete
FluProof.pdf	11/20/12	Delete
OSHA/BBP.pdf	11/19/12	Delete
DrugScreening.docx	11/16/12	Delete

Delete appropriate documents using the delete button. The system will ask you to confirm deleting documents. Click ok to delete.



Scroll down and click submit to refresh the page and make the “click here to upload” link will reappear.

Click here to re-upload documents.

Chapter 2: Time Log

Chapter 2 will teach students how to enter the overall time spent at the practicum site.

Student will learn to:

- ✓ Enter daily logs of time
- ✓ Edit time log entries
- ✓ Review Time Log Reports

Enter total time spent at the clinical site

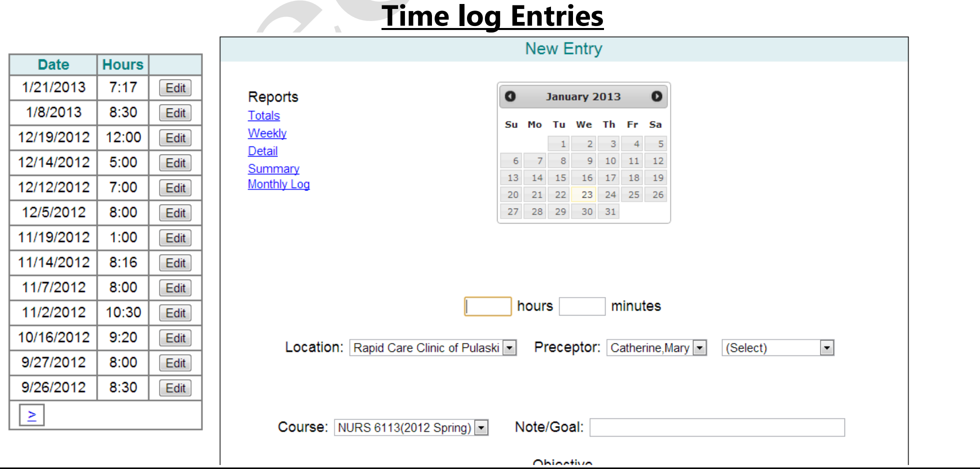
Medatrax time log allows students to record the overall time spent at the practicum site and meet required hours for courses.

Note:

Medatrax courses run simultaneously with current scheduled. Once courses end, entries for the time log in relevance to the course are not allowed without administrative approval

Time Log

Time log Entries



To record a new entry:

Select the day you are entering data from the calendar:

Enter the hours and minutes spent at the site:

hours minutes

Select the location:

Location: Birmingham Va Medical Center

Manage Locations

Click here to Manage Preceptors

Select the preceptor:

Preceptor: Hancock,Pamela

Manage Preceptors

Click here to Manage Preceptors

The third drop down is optional. If your program uses this option, select the proper data:

Extra Field (Select)

Select the course:

Course: NURS 6112(2013 Summer)

Enter a note (may be optional): Notes, Goals, and objectives are used to record information about the clinical experience and are optional for most programs. Please check with your program administrators to determine requirements for use of Notes, Goals and objectives:

Note/Goal:

Objective

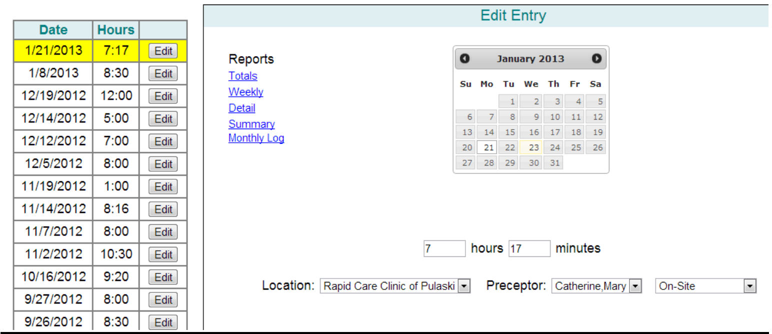
Once proper fields have been entered, select ok:

OK

Recent entries will be displayed by the table on the left:

Date	Hours	
6/17/2013	8:30	Edit
5/21/2013	8:00	Edit
4/23/2013	8:30	Edit
4/15/2013	8:15	Edit

Editing the time log



Date	Hours	
1/21/2013	7:17	Edit
1/8/2013	8:30	Edit
12/19/2012	12:00	Edit
12/14/2012	5:00	Edit
12/12/2012	7:00	Edit
12/5/2012	8:00	Edit
11/19/2012	1:00	Edit
11/14/2012	8:16	Edit
11/7/2012	8:00	Edit
11/2/2012	10:30	Edit
10/16/2012	9:20	Edit
9/27/2012	8:00	Edit
9/26/2012	8:30	Edit

To edit the time log, click the edit button next to the date you would like to change. Notice the date highlights:

Date	Hours	
6/17/2013	8:30	Edit

Make necessary changes, scroll down and click ok.
Select cancel to make no changes to the entry.
Select delete to remove an entry. Once a selection has been confirmed to delete, it is no longer associated with the account holder:

OK Cancel

Delete

Time Log Reports

Reports
Totals
Weekly
Detail
Summary
Monthly Log

- Totals Report

To see a cumulative total of time entered, click the totals report. The detail report shows the complete hours to date and a monthly breakdown of time entered.

Totals | Weekly | Detail | Summary | Monthly Log

Student:Florence Jane

Hours to Date: 721:08

Month	Total
01/2013	15:47
12/2012	32:00
11/2012	27:46
10/2012	9:20
09/2012	55:30
08/2012	26:35
07/2012	18:05
06/2012	27:00
05/2012	34:33
04/2012	31:15

1 2 3

➢ Weekly Report

The weekly report shows a weekly break down of time entered per month. If a week is not showing, an entry was not recorded during this time.

Totals | **Weekly** | Detail | Summary | Monthly Log

Student:Florence Jane

< 1/2013 >

Week	Hours
01/06/2013	8:30
01/20/2013	7:17

➢ Detail Report

The detail report specifies recorded entries and notes. This report may also be downloaded to a spreadsheet for record keeping.

Totals | Weekly | **Detail** | Summary | Monthly Log

Student:Florence Jane

Download to Spreadsheet

Day	Hours	Location	Preceptor	#Pats/hr	Note
1/21/2013	7:17	Rapid Care Clinic of Pulaski	Catherine, Mary	0.14	
1/8/2013	8:30	Rapid Care Clinic of Pulaski	Pitt, Brad	0.00	
12/19/2012	12:00	Rapid Care Clinic of Pulaski	Pitt, Brad	0.00	
12/14/2012	5:00	Rapid Care Clinic of Pulaski	Pitt, Brad	0.20	
12/12/2012	7:00	Rapid Care Clinic of Pulaski	Pitt, Brad	0.00	
12/5/2012	8:00	Rapid Care Clinic of Pulaski	Pitt, Brad	0.00	
11/19/2012	1:00	Rapid Care Clinic of Pulaski	Pitt, Brad	1.00	Test
11/14/2012	8:16	Rapid Care Clinic of Pulaski	Pitt, Brad	0.00	
11/7/2012	8:00	Rapid Care Clinic of Pulaski	Pitt, Brad	0.13	
11/2/2012	10:30	Rapid Care Clinic of Pulaski	Pitt, Brad	0.00	busy day

➢ Summary Report

The summary report allows generation of time by selecting specific parameters. Reports can include specific locations, preceptors, courses, or date ranges. To view all entries on one page select all for items per page and click submit.

Totals | Weekly | Detail | **Summary** | Monthly Log

Student:Florence Jane

Location: (All)

Preceptor: (All)

Course: (All)

: (All)

Date Range: -

Items per page: 25

Submit

Preceptor Signature: ______________________

Supervised clinical hours performed

Print Report

The Time log summary may be printed or emailed as instructed by your course instructors or program administrators. The email function is available to programs that have elected to use this function. To send your report via email, please select a specific preceptor and the course instructor. When selecting the course, please reference which course instructor the email should be forwarded to once verified.

Supervised clinical hours performed

Print Report

Email Report to Preceptor

- <u>Monthly Report</u>

The monthly report produces time entered by specific month. To generate appropriate data, enter dates based on a monthly time frame. Only enter one month at a time for proper generation of the report.

Totals | Weekly | Detail | Summary | **Monthly Log**

Student:Florence Jane

Date Range: 1/1/2013 - 1/31/2013

Submit

Student's Name: Florence Jane

Total Hours for the period: 15:47

Week Starting	Location	Preceptor	No. of Days This week	Hours This Week
1/6	Rapid Care Clinic of Pulaski	B.Pitt	1	8:30
1/20	Rapid Care Clinic of Pulaski	M.Catherine	1	7:17

Preceptor's Signature and Date________________________________

For verification of clinical hours performed

Chapter 3: Patients

Chapter 3 will teach students how to enter patient cases.

Student will learn to:

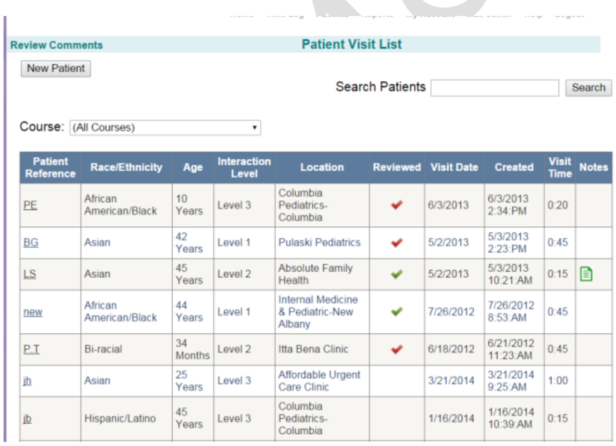
- ✓ Review the Patient List
- ✓ Enter patient demographics
- ✓ Enter patient visit details
- ✓ Enter visit data: Diagnosis, Medications, Procedures (optional per program)
- ✓ Update/delete patient entries
- ✓ Enter Patient Forms

Three steps in creating patients

Patient encounters are entered in three steps: 1. Enter patient detail, 2. Enter a visit, 3. Enter visit data. Students are encouraged to enter test patients to become familiar with the software.

Note:
Medatrax courses run simultaneously with current scheduled. Once courses end, entries for the time log in relevance to the course are not allowed without administrative approval

Patient Visit List:



Review Comments — Patient Visit List

New Patient

Search Patients [ ] Search

Course: (All Courses)

Patient Reference	Race/Ethnicity	Age	Interaction Level	Location	Reviewed	Visit Date	Created	Visit Time	Notes
PE	African American/Black	10 Years	Level 3	Columbia Pediatrics-Columbia	✔	6/3/2013	6/3/2013 2:34:PM	0:20	
BG	Asian	42 Years	Level 1	Pulaski Pediatrics	✔	5/2/2013	5/3/2013 2:23:PM	0:45	
LS	Asian	45 Years	Level 2	Absolute Family Health	✔	5/2/2013	5/3/2013 10:21:AM	0:15	
new	African American/Black	44 Years	Level 1	Internal Medicine & Pediatric-New Albany	✔	7/26/2012	7/26/2012 8:53:AM	0:45	
P.T	Bi-racial	34 Months	Level 2	Itta Bena Clinic	✔	6/18/2012	6/21/2012 11:23:AM	0:45	
jh	Asian	25 Years	Level 3	Affordable Urgent Care Clinic		3/21/2014	3/21/2014 9:25:AM	1:00	
jb	Hispanic/Latino	45 Years	Level 3	Columbia Pediatrics-Columbia		1/16/2014	1/16/2014 10:39:AM	0:15	

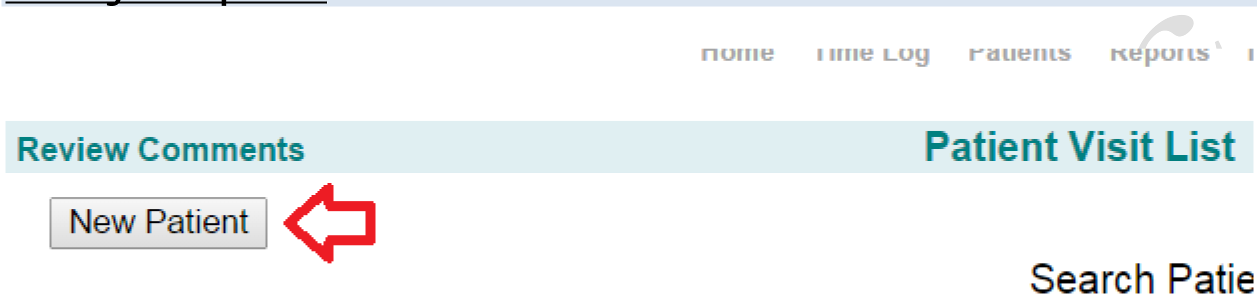
Patients list can be generated by a specific course or all courses to view all patients.
Each column can be clicked to arrange data in a helpful view.
There are two dates stored on the patient list:

Created- the date the patient was created
Last visit- the date of the recorded last visit
Reviewed Colum- Check Marks indicate when a visit has been reviewed by instructors:

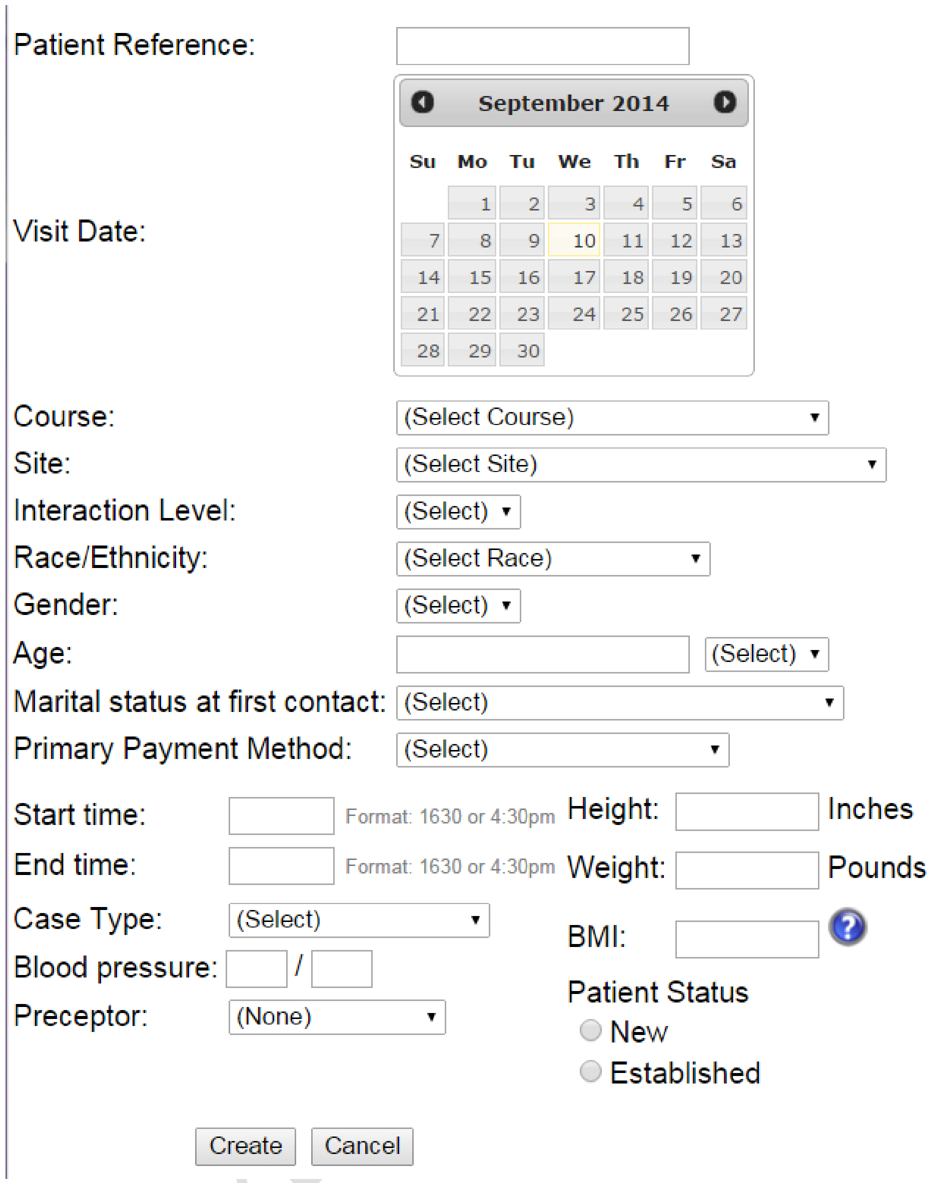
- student has not reviewed comment by instructor

- student has reviewed feedback

Creating a new patient:



Create the patient folder by entering patient and visit detail.



Patient Reference:

Visit Date:

September 2014						
Su	Mo	Tu	We	Th	Fr	Sa
	1	2	3	4	5	6
7	8	9	10	11	12	13
14	15	16	17	18	19	20
21	22	23	24	25	26	27
28	29	30				

Course: (Select Course)
Site: (Select Site)
Interaction Level: (Select)
Race/Ethnicity: (Select Race)
Gender: (Select)
Age: (Select)
Marital status at first contact: (Select)
Primary Payment Method: (Select)
Start time: Format: 1630 or 4:30pm
End time: Format: 1630 or 4:30pm
Case Type: (Select)
Blood pressure: /
Preceptor: (None)
Height: Inches
Weight: Pounds
BMI:
Patient Status
New
Established
Create Cancel

Patient Detail--creating a case

Identify the patient, course, clinical site, and enter ALL patient demographic information as defined by your program.

Patient reference naming schemes MUST BE *HIPAA compliant.

Use of patient's first/last names and or birthdays are not allowed.

Ex: AB

Note:

***HIPPA does NOT allow using first/last names and/or birthdays of patients. Removal of patient records via notes, texts or pictures is also a violation of HIPAA. Follow up with program administrators for examples of patient references.**

Add visit data:

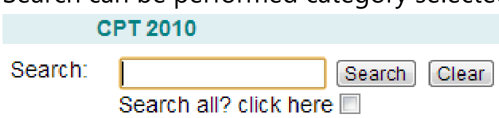
From the “Add visit data” drop down:

Select and enter visit data from drop-down box. The Visit Data drop-down contains appropriate categories for your specialty including Diagnosis, Procedures, Medications, etc.

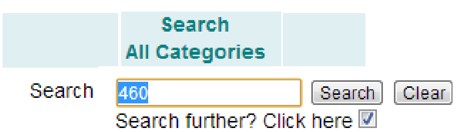
Note:
Medatrax can add or modify any category. Your feedback is appreciated.

Searching visit data:

Make entries quicker by utilizing the Medatrax visit data search option.
Search can be performed category selected:



To search by all categories, place a check in the box to search all:

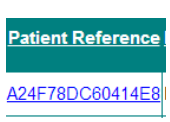


Searches can be by a specific code by number or word. Using more detailed words can reduce results of the search.

Editing Patient Details:

Select and click the patient reference link found on the Patient List or Student Overview.

Note:
If entering patient references, references must be HIPAA compliant:



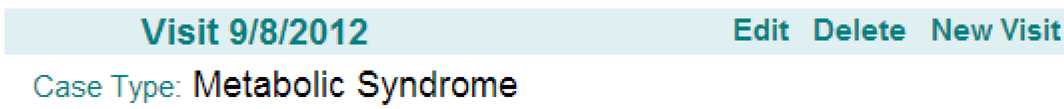
Click the Edit button found to the right of the *Patient Detail* heading.

Make needed changes, scroll down and click save:

Note:
Students may delete patients from their account. Clicking delete from the section above will remove all patient detail including visit and visit data.

Editing Patient Visits:

Click the Edit button located to the right of the visit section:

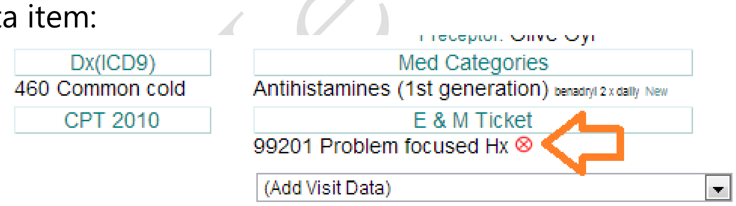


Updated data as needed and click submit:

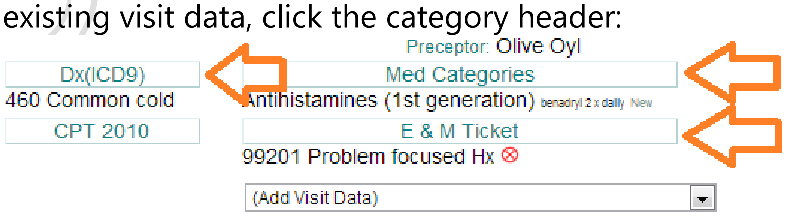
Note:
Students may delete visits from their account. Clicking delete from the section above will remove all patient visit details only.

Editing Visit Data:

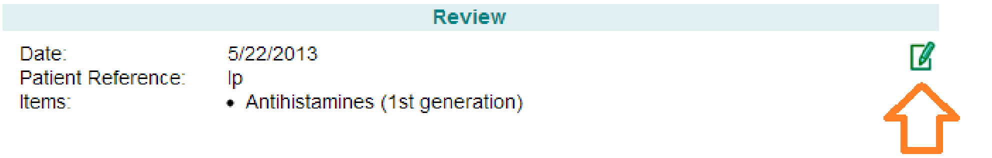
To delete existing visit data, hover over a data item and click the red X to instantly remove the data item:



To edit existing visit data, click the category header:



Review the data item and click the note pad icon to redirect o the category list:



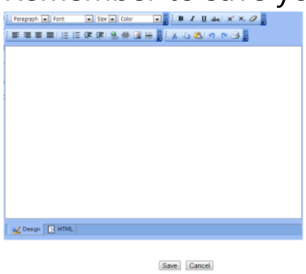
Check and/or uncheck boxes to update visit data with new entries.

Patient Student Comments: (optional)

Click Student comments to add a remark about your patient.

Student Comments

Comments may include labs, PEARLS, or a follow up recommendation.
Remember to save your comments:



Patient Forms:
Click here for more details.

Chapter 4: Forms

Chapter 5 will teach students how to enter the overall time spent at the practicum site.

Student will learn to:

- ✓ Create a new form
- ✓ Complete a form
- ✓ Retrieve an existing form
- ✓ View form comments
- ✓ View form grades
- ✓ Preview a Form

Enter total time spent at the clinical site

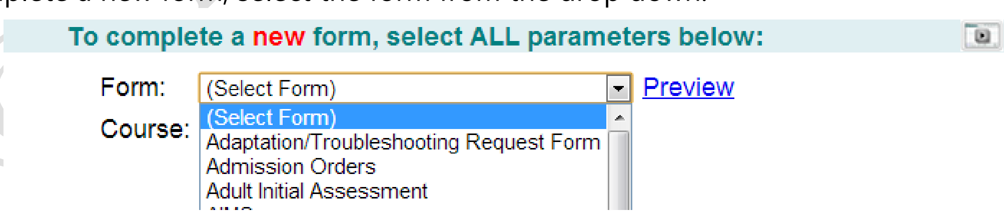
Medatrax time log allows students to record the overall time spent at the practicum site and meet required hours for courses.

Forms

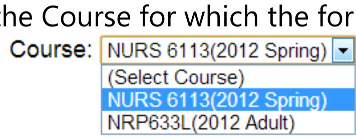
Creating a new form:

From the Form icon:

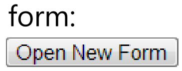
To complete a new form, select the form from the drop down:



Select the Course for which the form is being completed:

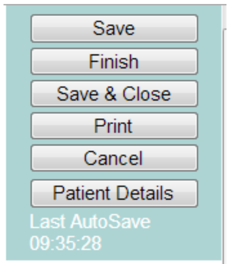


Click open new form:



Compelte the form as required/recommended by your program.

Once the form has been completed (finished), save your form from the controls located in the upper right of the page. When a form has been saved as finsihed, instucors and program administrtors are notified te form is availble for comments or grades.



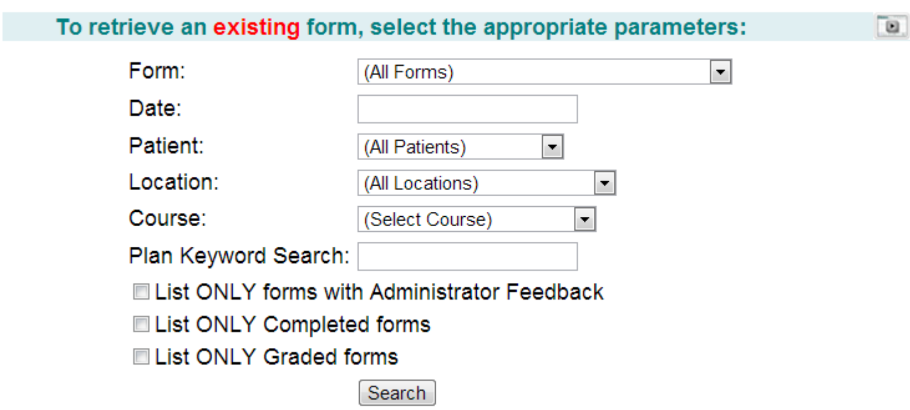
Please note: Forms automatically save every 2 minutes. For best performance, do not open multiple windows when using forms, as the auto save may save a blank form.

<u>From the Patient Detail Page:</u>

After completing step three of the patient entry, scroll down and click New Form located at the bottom of the page:

Complete these steps above

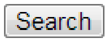
<u>Retrieved an Existing Form:</u>



Select the appropriate parameters from each drop down.

Hint: to view a complete list of all forms, each drop down should selected as above

Click search:



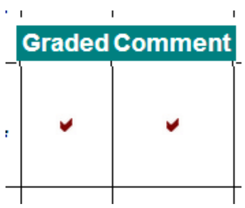
A list of forms will display at the bottom of the page:

	Form	Finished	Patient	Date	Location	Graded	Comment	
View	Reflections		C7E53C70CB65494	2/26/2013	Hillside Hospital			Delete
View	Pediatric Exam		C7E53C70CB65494	2/18/2013	Hillside Hospital			Delete
View	Focused SOAP Note		jtest	1/7/2013	Rapid Care Clinic of Pulaski			Delete
View	Complete SOAP Note		test forms	11/13/2012	Rapid Care Clinic of Pulaski	✓	✓	Delete
View	SOAP Note			11/7/2012	Rapid Care Clinic of Pulaski			Delete

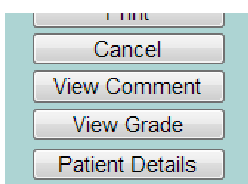
Click view to retrieve the form.

Viewing Comments and Grades on Forms:

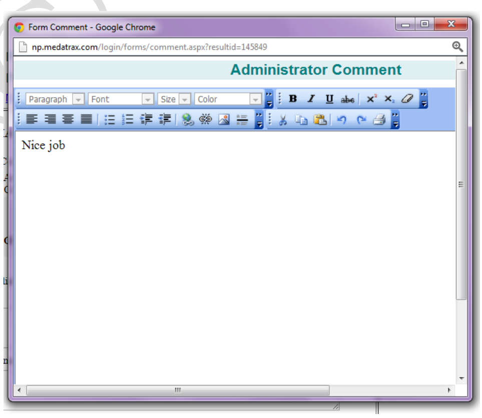
Forms that have been commented or graded will be indicated with a red check in the column:



To view a grade or comment, click the view link by the form and select *view comment* or *view grade* from the control panel located in the upper right of the page:

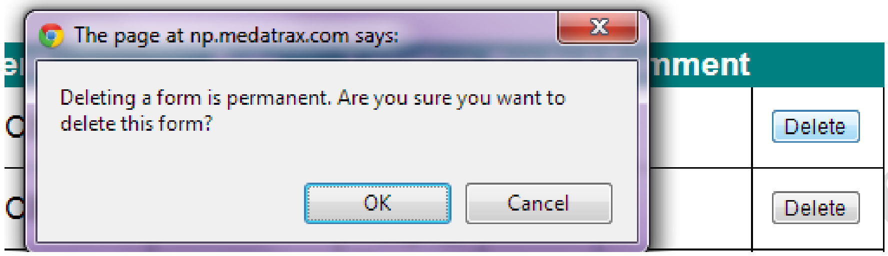


View the comment and/or grade from the generated pop up:



Note: Comments are left from instructors or progam adminstrators and do not allow students to enter comments back.

To delete a form, click the delete button next the the form you wish to delete:



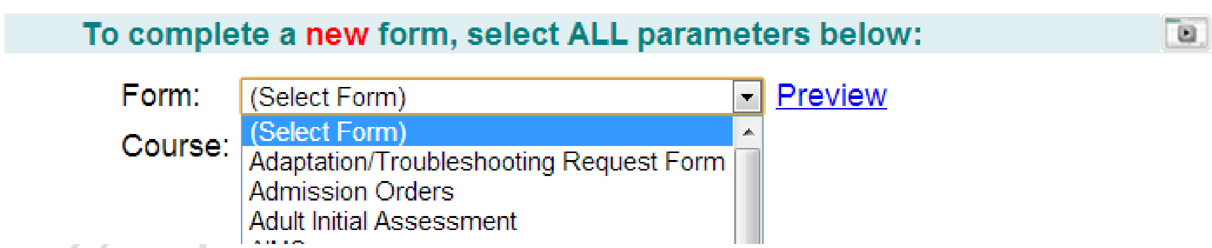
Note: Once a form is deleted it is permantley removed from the account. Forms can only be created/deleted by students.

Previewing Forms:

To Preview a form:

1. Click forms from the home page.

2. Select a form name and click “Preview” . A new window will open to preview the form. The form may also be printed from preview.



Chapter 7: Assignments

Chapter 7 will teach students how to enter the overall time spent at the practicum site.

Student will learn to:

- ✓ Preview Assignment Details
- ✓ Upload documents
- ✓ Complete an Assignments
- ✓ View Comments
- ✓ Resubmit an Assignment

Enter total time spent at the clinical site

Administrators can interact with students using the Assignment module within Medatrax. Students can complete documents or task assigned by program administrators. Once students complete assignments, they can upload documents for administrative review.

Assignments

- Log Onto Your Medatrax account
- Click Assignments from the home page:

Assignments

- The page generates with assignments summary:

Assignments

Course: -All-

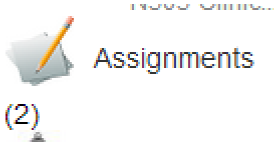
Status: -All-

Assignment Summary

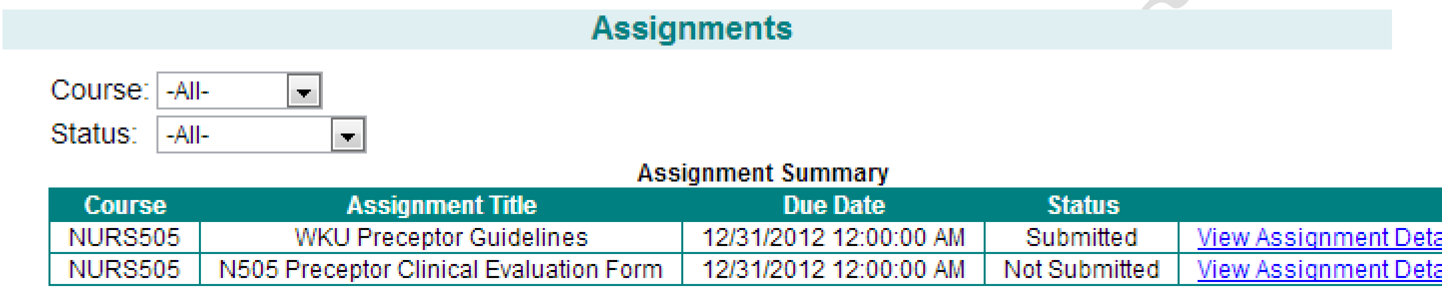
Course	Assignment Title	Due Date	Status	
NURS6115	test	9/29/2012 12:00:00 AM	Pending	View Assignment Detail
NURS 6113	STUDENT GUIDE AGREEMENT	10/12/2012 12:00:00 AM	Pending	View Assignment Detail
NRP633L	TEst	11/30/2012 12:00:00 AM	Pending	View Assignment Detail
NURS6115	Title	11/30/2012 12:00:00 AM	Pending	View Assignment Detail
NRP633L	Complete a PowerPoint	11/30/2012 12:00:00 AM	Pending	View Assignment Detail
NURS 6112	title	11/30/2012 12:00:00 AM	Not Submitted	View Assignment Detail
NURS 6113	Nursing Process Worksheet	12/15/2012 12:00:00 AM	Pending	View Assignment Detail

To complete assignments please do the following:

1. From the home page of your Medatrax account click assignments.



2. This will bring you to the assignment summary page. Click "*View Assignment Detail*" next to the assignment you are wishing to view.



Assignments

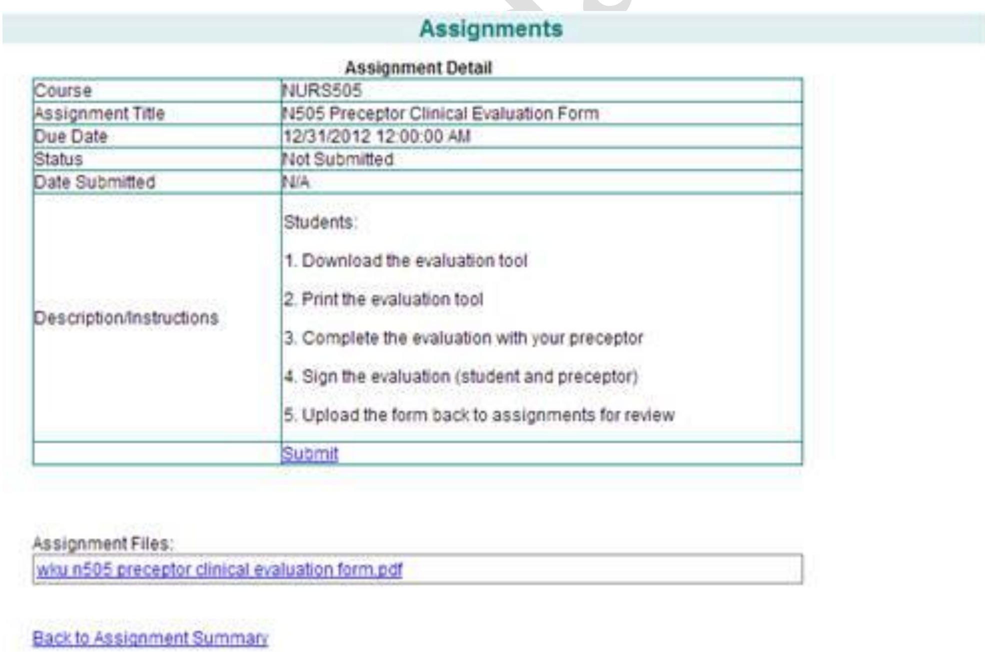
Course: -All-

Status: -All-

Assignment Summary

Course	Assignment Title	Due Date	Status	
NURS505	WKU Preceptor Guidelines	12/31/2012 12:00:00 AM	Submitted	View Assignment Deta
NURS505	N505 Preceptor Clinical Evaluation Form	12/31/2012 12:00:00 AM	Not Submitted	View Assignment Deta

3. Review the assignment detail and scroll to the bottom. Available documents will be linked under the "Assignment Files" tab.
4. Select a file to download
5. To submit a document, click the submit link located under the assignment detail description.



Assignments

Assignment Detail

Course	NURS505
Assignment Title	N505 Preceptor Clinical Evaluation Form
Due Date	12/31/2012 12:00:00 AM
Status	Not Submitted
Date Submitted	N/A
Description/Instructions	Students: 1. Download the evaluation tool 2. Print the evaluation tool 3. Complete the evaluation with your preceptor 4. Sign the evaluation (student and preceptor) 5. Upload the form back to assignments for review
	Submit

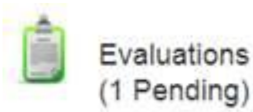
Assignment Files:

wku n505 preceptor clinical evaluation form.pdf

Back to Assignment Summary

Chapter 8: Evaluations

<u>Evaluations</u>



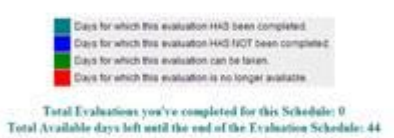
<u>Option 1 (Dual Authentication):</u>

Student and preceptor complete evaluation together.

1. Student logs into his/her Medatrax account.
2. Click evaluations from the home page.

3. Choose the appropriate evaluation. Links for available evaluations will appear under the grey box.

4. Select the day in which the evaluation is being completed for.



5. Sign into the evaluation (dual authentication):

A. student re-enters username/password
B. preceptor enters their username and password
Please note: usernames and passwords are provided by Medatrax account specialist. If either party forgets user details, please content Medatrax to obtain log in IDs.

6. Complete the evaluation
7. Sign out of the evaluation:
   C. student re-enters username/password
   D. preceptor re-enters their username and password

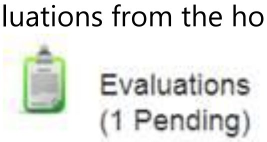
8. Click submit

Successful submissions will follow with "Evaluation Saved

<u>Option 2 (Student Evaluation):</u> *Student completes evaluation individually.*

To complete the student self-evaluations please do the following:

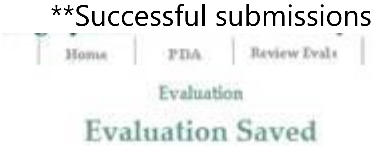
1. Student logs into his/her Medatrax account.
2. Click evaluations from the home page.



3. Choose the appropriate evaluation. Links for available evaluations will appear under the grey box.

4. Complete the evaluation.
5. Click submit

Successful submissions will follow with "Evaluation Saved"



Note: Evaluations have a begin date and an end date. Evaluations will remain “Pending” until the end date expires. Once end date passes, the evaluation link will no longer appear in accounts.

.

Chapter 9: Preceptor Request (optional)

Preceptor Application/Request

Requesting a course:

Open Medatrax Homepage
Click on Preceptor Request:

Preceptor Request

Scroll to bottom of page and select ***Request a new preceptor***:

Request a new Preceptor

Step 1:
Select the correct semester and year you are requesting the approval

Step 1. Select a Semester for the request: Select Year: Select

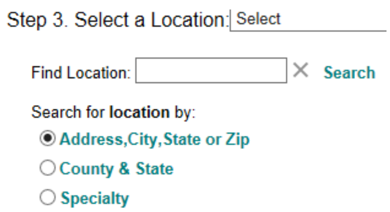
for

Step 2:
Select the correct course number:

Step 2. Select a Course: Select a Course

Step 3:
A clinical site is an actual location, a building with an address
Make sure you have **the published name** of the location
Select the location from the list in the dropdown or you may click on Search for locations:

Enter the search parameters and click on Search:

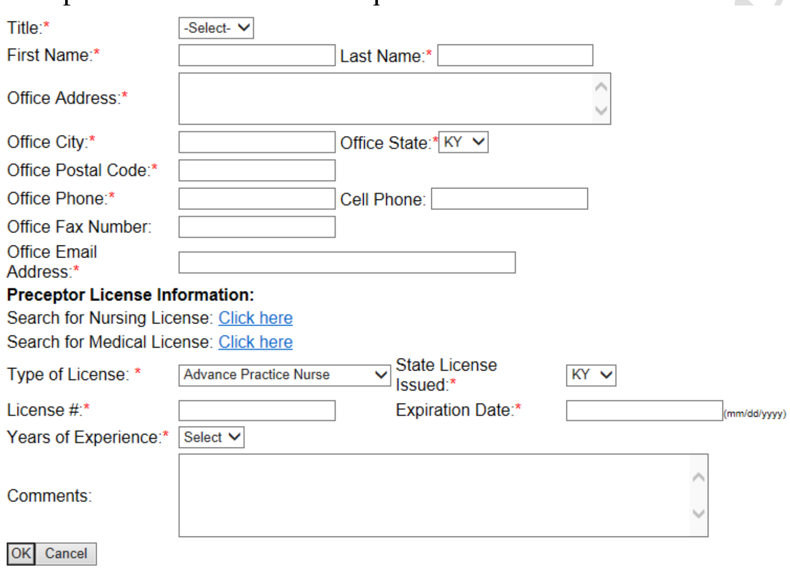


Step 4:

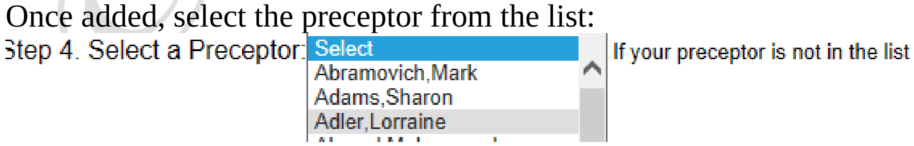
To Load a Preceptor

A preceptor is **an actual person.** The name as it is listed on the provider's license should be selected:

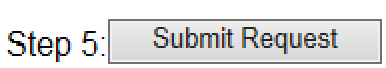
If the preceptor is not on the list you must add it
Select Add New Preceptor
Complete the information required fields with the name as it appears on the license:



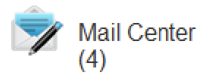
Click ok
Once added, select the preceptor from the list:



Step 5:



A message will be sent to program Administrators using the Medatrax mailing system. Your request will be viewable from the pending status, showing the date the request was made.

Check the Mail Center for approval of requested course(s). 

<u>Approved Courses, Locations, and Preceptors:</u>

Upon Administrative approval of a students requested preceptor(s), documents are available for downloading from the Medatrax website.

Directions to complete next steps will be described in a Mail Center Message automatically generated by Medatrax.

Documents to download and upload for preceptors will include:

- Preceptors CVs
- Preceptors License
- Practicum Approval Form

<u>Quick Hints and Tips:</u>

- Check the mailing system frequently for approval. Some request may need additional information before processing can be completed.
- Requesting new locations/preceptors should be entered solely one at a time.
- If locations or preceptors change during the course, a new request may be entered.

Chapter 10: MX Portfolio (optional)

Organize and collect documents, pictures, and experiences to demonstrate activities and practices during student nursing education.

Students will be managing areas of their portfolio by:

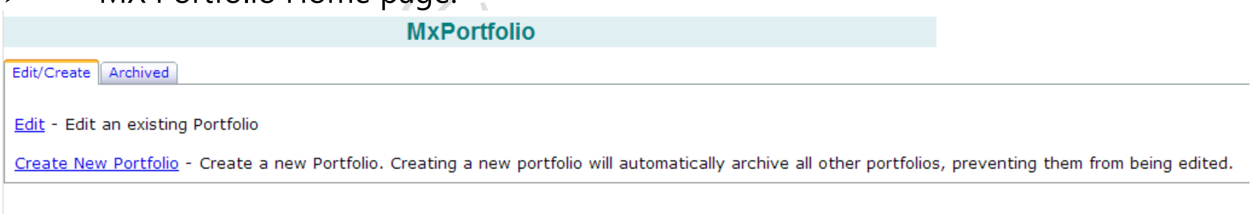
- ✓ Creating a Portfolio
- ✓ Editing a Portfolio
- ✓ Previewing Portfolio
- ✓ Archive Portfolios

Using Portfolio

A nursing portfolio provides documented evidence of your achievements and creates records of your professional development and includes clinical and patient experiences.

- ➢ Log Onto Your Medatrax account
- ➢ Click MX Portfolio from the home page:

- ➢ MX Portfolio Home page:

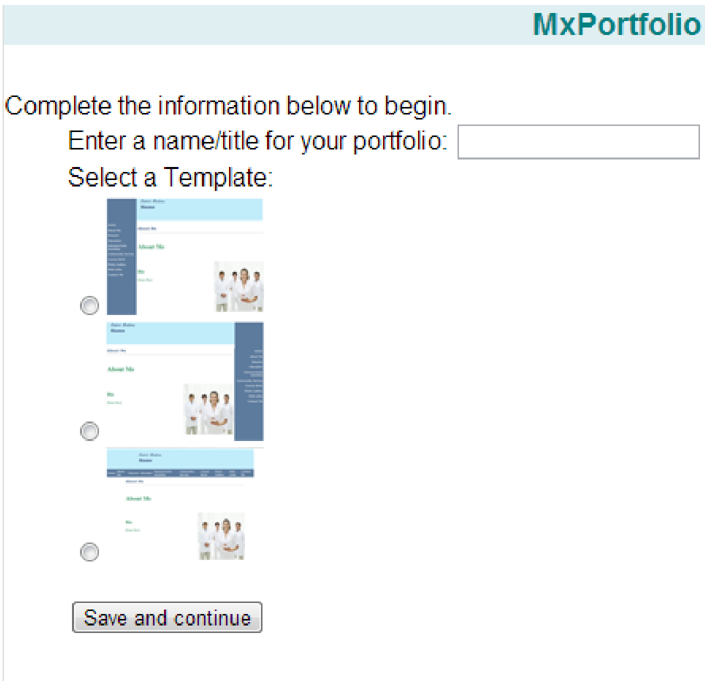


Creating a portfolio

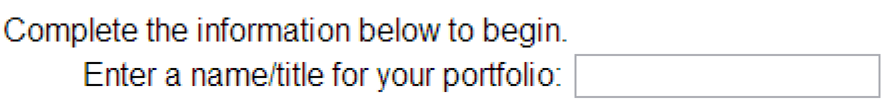
Click create new Portfolio to begin:

Create New Portfolio

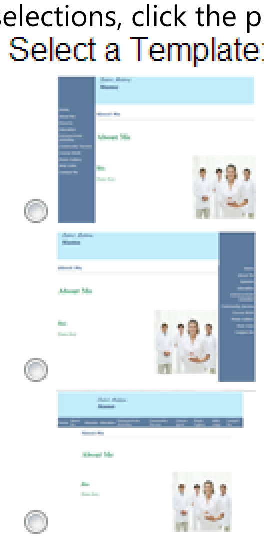
The following page will appear:



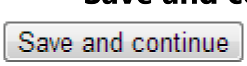
➢ **Enter a name/title for your portfolio:** Examples: Freshman Portfolio, My Portfolio (follow up with course instructors for specific requirement for MXPortfolio).



➢ **Select a Template:** Select from one of three templates. To preview a template before selections, click the picture.



➢ **Save and continue**:



➢ **Select pages to include in your portfolio**: select from available links:

Select the pages to include in your portfolio:

- [ ] About Me
- [ ] Resume
- [ ] Education
- [ ] Extracurricula Activities
- [ ] Community Service
- [ ] Course Work
- [ ] Photo Gallery
- [ ] Web Links
- [ ] Contact Me
- [ ] Ethics Project
- [ ] Interview Analysis Paper
- [ ] Nursing Process Worksheet
- [ ] Clinical Learning Worksheet #2
- [ ] Nursing Research Study Poster

Research | Add

Research

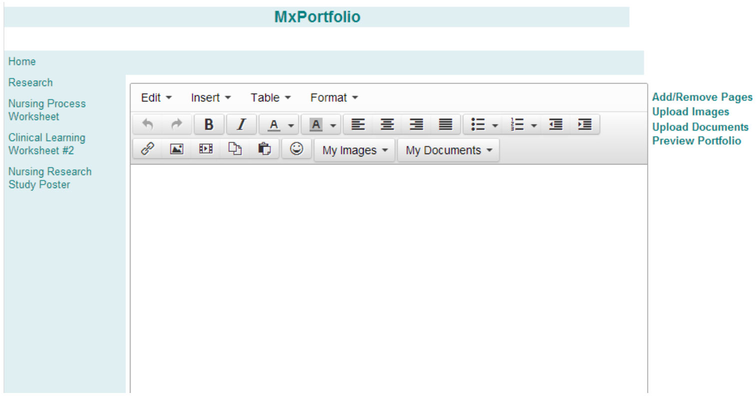
- **Add new link**: Add customized links to portfolio:
- **Check boxes**: Place check in next link and save selection:

- [x] Nursing Process Worksheet
- [x] Clinical Learning Worksheet #2
- [x] Nursing Research Study Poster
- [x] Research

Save Selection

Editing a Portfolio

When editing a portfolio the following page should appear:



➢ **To begin, select the link or page for editing:**

Home

Research

Nursing Process Worksheet

Clinical Learning Worksheet #2

Nursing Research Study Poster

Note: Portfolio pages/links were established when creating the portfolio. If additional pages/links need to be added or edited, select "Add/Remove Pages" from navigation on right of edit box 9see image below)

Document and picture upload:

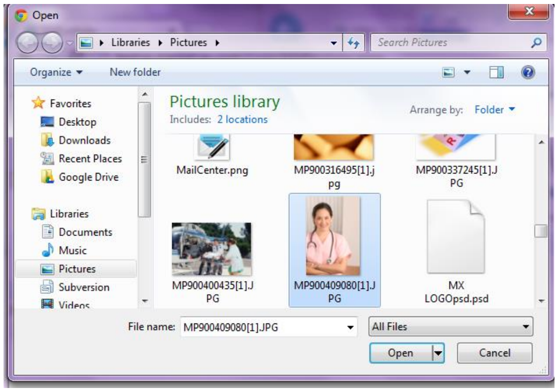
To upload images, select "Upload Image" from right navigation:

Add/Remove Pages
Upload Images
Upload Documents
Preview Portfolio

Choose a file to upload:

Choose File No file chosen

Browse your computer and select the image you wish to upload, then click Upload Image.



Select image and click "upload Image":

Upload Image

The system will acknowledge the upload was successful:

Image uploaded successfully

Once all pictures have been uploaded, select "back to Portfolio:

Back to Portfolio

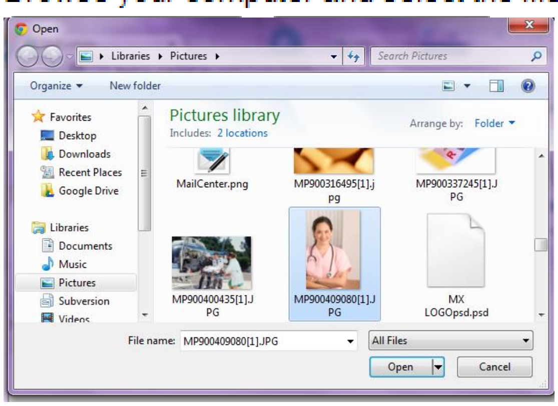
To upload documents, select "Upload Documents" from right navigation:

Add/Remove Pages
Upload Images
Upload Documents
Preview Portfolio

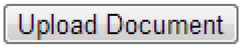
Choose a file to upload:

Choose File No file chosen

Browse your computer and select the file you wish to upload, then click Upload Document.



Select image and click “Upload Document”:



The system will acknowledge the upload was successful:

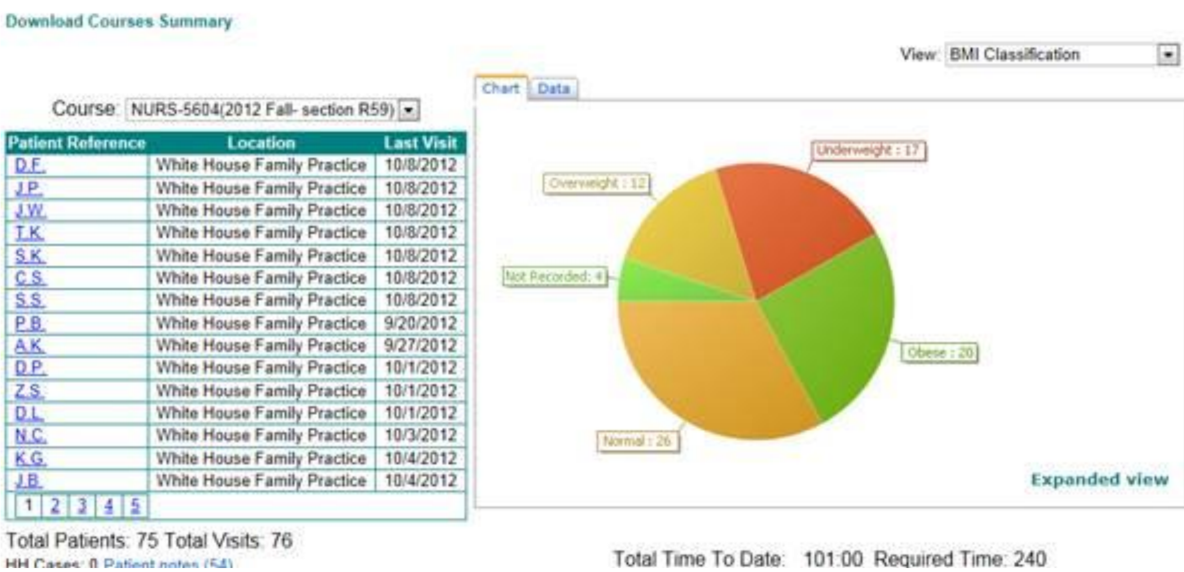
Once all documents have been uploaded, select “back to Portfolio:

Chapter 11: Reports

Reports

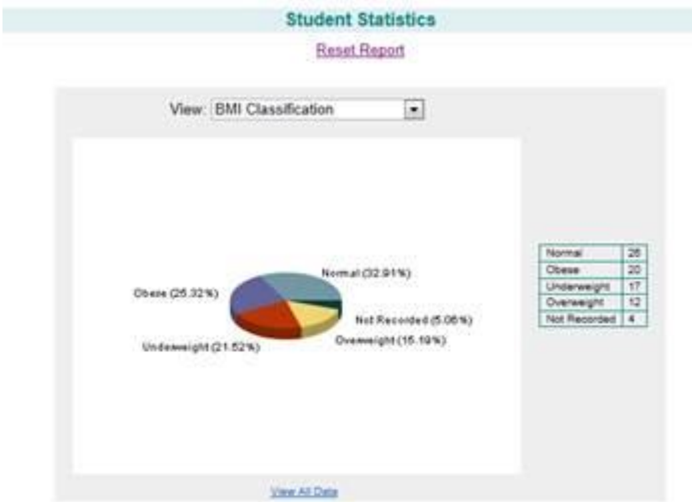
Reports

. **Student Overview**- from the home page of you Medatrax account select reports. Click "Student Overview". This display an 'overview" of your time log and patient details. The report can be generated by specific courses. To view all data, make sure all courses is selected from the down for courses. Next, above the pie graph, click the drop down box to display visit and patient detail sections. Click the BMI Classifications. The following screen should display;



Patient Reference	Location	Last Visit
D.F.	White House Family Practice	10/8/2012
J.P.	White House Family Practice	10/8/2012
J.W.	White House Family Practice	10/8/2012
T.K.	White House Family Practice	10/8/2012
S.K.	White House Family Practice	10/8/2012
C.S.	White House Family Practice	10/8/2012
S.S.	White House Family Practice	10/8/2012
P.B.	White House Family Practice	9/20/2012
A.K.	White House Family Practice	9/27/2012
D.P.	White House Family Practice	10/1/2012
Z.S.	White House Family Practice	10/1/2012
D.L.	White House Family Practice	10/1/2012
N.C.	White House Family Practice	10/3/2012
K.G.	White House Family Practice	10/4/2012
J.B.	White House Family Practice	10/4/2012
1 2 3 4 5		

2. Statistics Report- from the home page of you Medatrax account select reports. Click "Statistics Report". Enter a date range or leave blank to view all data. Click submit. The report will generated an interactive pie graph (Java must be installed an active for the pie graph to populate. If you are having trouble please download the latest version of java by visiting the following link: http://java.com/en/download/index.jsp). From the drop down, select BMI classifications. The following screen should appear:



Click a section of the pie graph to display patient associated with that particular data. To view all data, click the all data link. Patient details will appear under the pie graph.

Patient cases are displayed in several reports in Medatrax. Below contains a quick guide to reports associated with patient case entry: ***Please note: You must be logged in your Medatrax account for links to work***

- Patient Details and visit:
  - Student overview: http://np.medatrax.com/login/studentoverview.aspx
  - Statistics Report- http://np.medatrax.com/login/reports/stats.aspx
  - Case Type report- http://np.medatrax.com/login/reports/CaseTypeReport.aspx
  - Clinical Data Detail- http://np.medatrax.com/login/reports/portfoliodata.aspx
  - Patient Age Group Report- http://np.medatrax.com/login/reports/PatientAgeGroups.aspx
  - Student Comments/Notes: http://np.medatrax.com/login/reports/NotesReport.aspx
  - End of Semester Log Clinical Log- http://np.medatrax.com/login/reports/clinicallog.aspx

- Patient Visit Data-
  - Data Totals- http://np.medatrax.com/login/reports/summary.aspx
  - Diagnosis Statistics- http://np.medatrax.com/login/reports/diagnosisstatistics.aspx
  - End of Semester Log Clinical Log- http://np.medatrax.com/login/reports/clinicallog.aspx
    - Clinical Data Detail- http://np.medatrax.com/login/reports/portfoliodata.aspx

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Medatrax, Inc.

Clinical Data Tracking
for
Health Professional Education

If you have any questions or problems, please feel free to contact us.
Office hours are Monday-Friday 8-9 and Saturday 8-noon Central Time.
After hours support is available; call to schedule.
We welcome the opportunity to assist you.

Contact: Webmaster@medatrax.com
1-800-647-4838