

# MedicKey Personal Health Records® GOLD

## Welcome!

Welcome and thank you for choosing MedicKey as your provider of your Personal Health Records. You have taken an important step in assuring that you and your healthcare providers can have ready access to your important medical information, whenever and wherever needed.

The information on your MedicKey is not intended to be a complete medical history, but rather your most current information for use in the event of an emergency room visit, or similar, when fast and appropriate care is essential to your well being. It can also be used when seeing a new physician, or at a consultation, to rapidly update the new provider with your current medical information. And, you can easily update your information as needed.

## Disclaimer

By using the MedicKey device, you acknowledge that you are fully responsible for the information entered and contained within. Portable Information Management Systems, Inc. is in no manner responsible or liable for the completeness or accuracy of the information and documents that you choose to enter into your MedicKey device.

## Preparation

When preparing to personalize your MedicKey it is important to first plan what information you would want medical personnel to know about you and any medical conditions you may have.

There are two sections to your MedicKey:

First, using easy to follow pre-formatted pages you will have the opportunity to complete the following information: your name, address, emergency and physician contacts, insurance information, basic health history for both yourself and your immediate family, medications and allergies, immunizations and surgical history. You will also be able to scan in your photo and insurance cards into these pages.

Next, there are areas to scan in documents and images under Buttons labeled as:

<b>Legal Directives</b>	<b>Cardiology (e.g., EKG, etc.)</b>
<b>Laboratory and Radiology</b>	<b>Other Documents</b>

An average of up to 2,000 images may be added (this amount is in addition to your photo and insurance card images). You may include your scanned images now or at a later time, and can easily add, delete and update them in the future.

\*It is recommended that you gather all of these items prior to beginning the personalization to your MedicKey.

## Scanning Documents for Your MedicKey

While it is impossible to note every program available for scanning and downloading documents, most are very similar in nature. Within the general set up there is a folder that your scanned documents go to (e.g. My Pictures). Other suggestions would be to put your images onto a Cd/DVD or your desktop for easy access. Cd/DVD images may be available directly from your MD, hospital, or other medical facility.

If you have no preferred program for managing your images, we suggest using the Microsoft® Office Picture Manager as it is very user-friendly.

Review your documents making sure they are high quality copies. You may want to first darken them (by photocopying them at a darker setting). **You may choose to crop out any large empty areas or edges (as with the insurance cards).**

It is also important to make sure that you scan any insurance cards (front and back) separately as they go in individual areas. There are four areas for two cards (front and back of each).

## Getting Started

To start, simply plug your MedicKey into the USB port of your Windows® based computer. Depending upon your computer's version of Windows®, it may take up to a minute for your MedicKey to auto-launch and open with the Welcome screen.

**Notes: Never remove your MedicKey device without first clicking EXIT! You may see a Windows® Message requesting that you restart your computer, this is not necessary. Click No.**

To proceed, click the '**I Accept**' button located in the bottom center of your screen.

## Passwords

### Some important considerations:

Remember that any passwords you create here are solely your knowledge. Please be sure to either use a password you will not forget, or have documentation of your password someplace safe!

We strongly recommend you create an **EDIT** Password. This password will merely prevent anyone viewing your key from accidentally erasing or changing your information without your approval.

You may also elect to set an **ACCESS** password. Please be advised, if you elect to assign a password here, information within your MedicKey will **NOT** be available if you are unable to provide your password to a healthcare provider or others.

If you elect to use both the **EDIT** and **ACCESS** passwords, they may be the same or different, as you wish.

Passwords may be later created and / or edited by clicking the **Password** option in the upper left portion of the MedicKey screen.

When complete, click the **Next** button located in the bottom center of your screen to proceed to Member Information.

**\*Note: When first entering your information it is important to use the Next button versus the buttons on the left to navigate so that no information can be missed. In the future you may click the buttons on the left to go directly to each area.**

## Member Information

The Member Information sections are free-text sections which allow for simply typing in the information. You may choose to enter as much or as little information as you wish. After entering the desired information, click the **Next** button located along the bottom center of your screen.

\*Hints or examples are accessed by moving your cursor over each of the text boxes.

## Member Photo

The Member Photo screen is the first of your image screens.

To input your already scanned photo, either click on the **Browse** button and look for your image or, click on the **Minimize** button on the upper right portion of your MedicKey screen.

Next, open the folder containing your scanned images, or simply choose the image from your desktop if that is the method you chose. Maximize (reopen) your MedicKey screen and size both screens so that you can view the MedicKey screen and your images at the same time.

Select the photo by clicking on the image. While holding down your left mouse button drag the photo into the image box on your MedicKey screen. Your photo will appear in the image area and on the opening screen.

Click the **Next** button located along the bottom center of your screen.

## Member Alerts

In the Member Alerts section, you have the opportunity to enter information that you would like healthcare providers to know immediately about you and / or your health. Some examples: if you have cardiac issues, a pacemaker, diabetes, Alzheimer's, or if you would like it known that you have a Do Not Resuscitate (DNR) contained within your MedicKey.

You also have the choice of whether or not you would like for this information to be in a red font to draw attention.

After entering any information you choose, Click the **Next** button located along the bottom center of your screen.

## Insurance Information

The Insurance Information screen is very similar to both the Member Profile and Member Photo screens. Type any insurance information into the text boxes. Then, click **Browse** to look for the images, or drag and drop your insurance card images into each of the image boxes in the same manner that you added your Member Photo in the Member Photo screen. There are areas for two insurance cards (front and back).

**\*Note:** All image screens have magnifying + and reducing – buttons located adjacent to each image, click as many times as needed to magnify (or reduce) to allow for better viewing.

You may also place the cursor over the image, and while holding down the left mouse button, move the image up, down, left, or right to view other areas of the image.

Once complete, click the **Next** button located along the bottom center of your screen.

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## Physicians

In the Physician Information screen type in details for any Physicians that you may have, (up to 19).

Click the **Next** button located along the bottom center of your screen.

## Medical History Questionnaire

The Medical History Questionnaire consists of two (2) screens of general health related questions about you and your immediate family. Check any applicable boxes, and type in any information in the text boxes relating to you or your immediate family's health.

Click the **Next** button located along the bottom center of your screen.

## Medications and Allergies

To list your Medications, click on the **Add Medications** on the top left of your medications screen. Your cursor will start in the new pop up menu on Medication name. You may choose from the list by typing the first few letters and clicking the down arrow on the right, or you may type the medication name. You will notice that as you add information, the MedicKey program will create a list box of all previously entered information that will allow for easier and faster editing and adding of information in the future (includes all other areas within this pop up menu: e.g. dosages, frequencies, and Physicians)!

Medications may be **Edited**, moved to **Medication History** or **Current Medication** tables by clicking on the medication you would like to move and clicking **Edit**, **Move to History**, or **Move to Current**.

The Allergies areas are free-text for typing in your information, much the same as the text boxes in the health history questionnaire.

Click the **Next** button located along the bottom center of your screen.

## Immunizations

For the Immunizations area, Click any check boxes that apply. When a box is selected the current date will appear, if this is not the correct date you may use the down arrow to display the calendar and select a date, or you may type the date you choose.

When complete, click the **Next** button located along the bottom center of your screen.

## Member Notes

In the Member Notes area, click the **Add** button to add any notes.

This area can be used for your own notes, or notes from you to a healthcare provider. For example, you may want to enter the date of your last visit to your Physician, or a reminder of your next appointment, or a note to a provider that you recently had a specific test such as an EKG and where the test was done.

This area is free-text and you may enter any information you like. First click **Add Note**, then enter the title of the note, for example "MD visit on Thursday the 10<sup>th</sup>." Next click in the **Note Body** and type in your note, then click **Save**. To view your notes, click and highlight the note title in the upper **Notes** area.

When complete, click the **Next** button located along the bottom center of your screen.

## Documents

The next four (4) areas are all for the documents and images you have scanned and want to include. The tabs are as follows: **Legal Directives, Cardiology, Laboratory and Radiology, and Other Scanned Documents**.

These areas all function just as the Member Photo, and Insurance Information areas did with a few of minor differences. After the first image has been added, you will see that there are two areas where you may add the additional images. As you add images the button on the left will show the total number of images contained within. When viewing an image the top of each page will show which image you are viewing (ex.2 of 6).

The first area labeled; **Drag and drop or paste (ctrl+V) an image here to add before image one**. (This area will always add the image you are loading before the image you are currently viewing.)

The next area labeled; **Drag and drop or paste (ctrl+V) an image here to add image \_**. This image number changes with each image. This area will always add the image you are loading as the last image.

You may delete and add new images at any time.

## Completing Your MedicKey

Once you have added all of your images, you need to know about some important features. On your menu toolbar, under the heading

**File** you will find: **Save (Ctrl+S)**, **Restore Saved (Ctrl+O)**, and **Synchronize With Saved**.

**Save, (Ctrl+S)** saves an encrypted file with all of your MedicKey information onto your computer.

**Please note:** This becomes a "hidden file" on your computer and cannot be viewed directly or copied onto anything other than another MedicKey device. This file is used as a back-up in the case that you need to restore your information onto your MedicKey or onto a new MedicKey (e.g., if your original is lost). This will prevent you from having to reenter all of your information from the beginning! Using the **Save** function is very simple. Once you have entered all of your information (or when you've made changes), Go to the **File** heading and click the **Save** or press **Ctrl+S**. That's it!

**Note:** When a **Save** has been completed, the upper right-hand portion of your screen will show the date of the most current **Save**.

**\*\*When entering / editing information, always be sure to do a SAVE so that you have the most current information stored for back-up. Then be sure to click the EXIT before removing your MedicKey to insure that your information is stored on your MedicKey!**

**Restore Saved (Ctrl+O)**, to restore your saved information onto your MedicKey, or a new or upgraded MedicKey; Simply plug the MedicKey into your USB port as you normally would to get started. Once the Welcome screen appears, go to the **File** heading and click **Restore Saved** or press **(Ctrl+O)**. After the Restore is complete your information should appear just as the original file was when you saved it!

## Additional Features

To edit or change any information, plug in your MedicKey as you would to view. Enter your edit password (if you chose to utilize this feature). Go to the area or image you wish to edit and make your changes. When complete be sure to save your changes, by clicking **Save!**

Your MedicKey also has a **Print** feature! Any page (including images) may be printed while it's being viewed. To print, click on the **Print Menu** heading on the menu in the upper left area of your screen. Then choose to **Print Current Page** or **Select Page**. If **Select page** is chosen, you will be shown a pop-up menu from which you may choose the pages you would like.

**Note:** Printed images will appear in the original scan size rather than the size as viewed within the MedicKey screen.

As development continues, MedicKey offers **FREE** software upgrades. To check if an upgrade is available, plug in your key and click **Help** and **Check for New Version**.

## Family MedicKey

You may choose to upgrade to a Family MedicKey, which can hold up to six (6) total family members on a single key. To do so, order your CD-B upgrade! If you should choose, and once all family members have been created, duplicates can be made for each family member by purchasing additional MedicKeys and using the **Save / Restore** feature described in the **Completing Your MedicKey** section. And, using the **Synchronize with Save** feature described below, all MedicKeys can be updated when any change is made to a family members data.

**Synchronize With Saved** is used when a family has multiple MedicKeys or a member has more than one MedicKey. When a member / family member changes any information on their key and completes a **Save (Ctrl+S)** to save the new information, they can then plug in their duplicate key or another family members key and select **Synchronize With Saved** to update their new information onto the other keys! (The same is true for each family member!)