



## Holistic Notes<sup>SM</sup> User Guide

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## Introduction

*Holistic Notes* is a user-friendly patient management tool designed especially for the holistic nutrition practitioner. Each office visit is easily documented in a S.O.A.P (subjective, objective, assessment, plan) format, capturing the area, system, or reflex tested; as well recommended products, and specific instructions for each patient. The program highlights when each supplement was first prescribed, for accurate and effective patient management.

A major benefit of *Holistic Notes* is the patient take home *Supplement Schedule*. With a couple clicks of the mouse, the patient's Supplement Schedule is extracted from the office visit notes and printed. You can also create and print a *Supplement Estimate* listing the number of tablets needed till their next visit, and the cost of the number of bottles you have advised.

It is my hope that this program will make it easier for you to help more people live better naturally. Working together we can make a better world.

### **Muscle Testing vs. Analysis by Body Systems**

*Holistic Notes* was originally designed for practitioners who evaluate their patients using muscle testing; however it works equally well for those who prefer to evaluate body systems by history and exam. Thus *Holistic Notes* works well for acupuncturists, chiropractors, dentists, herbalists, medical doctors, naturopaths, nurses and veterinarians who prefer to evaluate by history and exam of body systems. This is especially useful for those getting started with nutrition as supplements are suggested for each body system. Many body functions are also included with suggested products.

You can select your primary system analysis during the registration process and your *Holistic Notes* website will be preloaded with the relevant body scan areas, reflex points or body systems.

### **Getting Started**

Perhaps the fastest way to learn *Holistic Notes* is to get the "big picture" by watching the videos on the *Help* page and then follow the User Guide step-by-step to get the detail.

### **User Guide Organization**

The main program features are listed in the Table of Contents. When program features are mentioned in the text they appear as **Bold**. When referring to an element in an illustration the text appears as **Bold**.

## Registration and Login

### Registration (step 1)

To register go to [www.holisticnotes.com](http://www.holisticnotes.com) then click on **Practitioner Link to Holistic Notes EHR**.

**Holistic Notes<sup>SM</sup>**  
Patient Management ~ Patient Education ~ Better Results

*Holistic Notes* is a user-friendly patient management tool designed especially for the holistic nutrition practitioner. Each office visit is easily documented in a S.O.A.P note format, capturing the area or reflex tested, recommended products, and specific instructions for each patient. The program highlights when each supplement was first prescribed, for accurate and effective patient management. A major benefit of *Holistic Notes* is the nutrition program that the patient takes home with him. With a couple clicks of the mouse, the patient's nutrition program is extracted from the office visit notes and a sheet is printed for the patient that lists:

Your clinic name

Practitioner link to Holistic Notes EHR

ORDER TODAY!  
TO ORDER CALL  
**508. 583.2565**  
OR  
E-MAIL US

### Registration (step 2)

This brings you to the Login/Register page, click on **Register**.

**Holistic Notes<sup>SM</sup> Gateway**

- [Login](#)
- [Register](#)

### Registration (step 3)

1. Enter required information noted by an asterisk (\*), this will be used to preload your office information into *Holistic Notes*. It is easy to change your office information later and this is covered in the **Office Information** section of this user guide. If you have **Promo Code** for a special offer be sure to fill it in.
2. Enter the **User Name** and **Password** that you will use to login to *Holistic Notes*.
3. Select your primary method of evaluating patients so we can preload some data for you.
4. Review our **Software-as-a-Service Agreement** and check the box.
5. Click **Submit**.

#### Holistic Notes<sup>SM</sup> Registration

\* required fields (we use this information to preload your office information into Holistic Notes)

1.	<b>Your Full Name*:</b> <input type="text" value="Jon"/>	<b>Company Name*:</b> <input type="text" value="JS Chiropractic Wellness Center"/>
	<b>Address1*:</b> <input type="text" value="28 Braintree Lane"/>	<b>Address2:</b> <input type="text"/>
	<b>City*:</b> <input type="text" value="Boston"/>	<b>State*:</b> <input type="text" value="MA"/>
	<b>Telephone*:</b> <input type="text" value="617 698-222x"/>	<b>Zip Code*:</b> <input type="text" value="02011"/>
	<b>Email Address*:</b> <input type="text" value="drJ@JSChiroWellness.com"/>	<b>Web Address*:</b> <input type="text" value="www.JSChiroWellness.com"/>
2.	<b>User Name*:</b> <input type="text" value="Jon S"/>	<b>Promo Code:</b> <input type="text"/>
	<b>Password*:</b> <small>Password should be at least 6-12 characters and be a combination of upper and lowercase letters along with numbers and special characters such as @#%&amp;'*~()[]-. The password strength meter should be at least Good and optimally STRONG.</small> <input type="password" value="....."/> <span style="font-size: x-small; color: blue;">Show</span> <span style="font-size: x-small; color: blue;">Generate</span> <span style="font-size: x-small; color: green;">medium</span>	
3.	Select your primary evaluation method from the list below*, so we can preload appropriate body scan areas, reflex points or body systems into your Holistic Notes EHR website. You will be able to easily create, edit and delete these items once you are logged in.	
	<b>Kinesiology</b> <input checked="" type="radio"/> Nutrition Response Testing <sup>SM</sup> <input type="radio"/> System Strength Analysis	
	<b>Body System and Function</b> (evaluation by exam and history) <input type="radio"/> Universal body systems and functions <input type="radio"/> Herbalists	
4.	Please read the following agreement before submitting your registration form. By checking the box below, you are agreeing to the terms and conditions as set forth in the <b>Software as a Service Agreement</b> .	
	<input checked="" type="checkbox"/> <a href="#">Software as a Service Agreement*</a>	
5.	<input type="button" value="Submit"/>	

### Registration Confirmation

You should now see the **Thanks for registering!** screen, indicating that you have successfully registered.

#### Thanks for registering!

An email has been sent to the site administrator for confirmation and activation. You will be notified by email when your account is activated.

### Activation

You will receive an e-mail notification once your personal *Holistic Notes* EHR website has been activated, it can take a few days for preparation and activation. This is your indication that you are now ready to access *Holistic Notes* EHR at [www.holisticnotes.com](http://www.holisticnotes.com).

Hello Jon Smith,

Your account with Holistic Notes has been confirmed and activated.

### Login (step 1)

To login go to [www.holisticnotes.com](http://www.holisticnotes.com) and click on **Practitioner Link to Holistic Notes EHR**.

**Holistic Notes<sup>SM</sup>**  
**Patient Management ~ Patient Education ~ Better Results**

*Holistic Notes* is a user-friendly patient management tool designed especially for the holistic nutrition practitioner. Each office visit is easily documented in a S.O.A.P note format, capturing the area or reflex tested, recommended products, and specific instructions for each patient. The program highlights when each supplement was first prescribed, for accurate and effective patient management. A major benefit of *Holistic Notes* is the nutrition program that the patient takes home with him. With a couple clicks of the mouse, the patient's nutrition program is extracted from the office visit notes and a sheet is printed for the patient that lists:

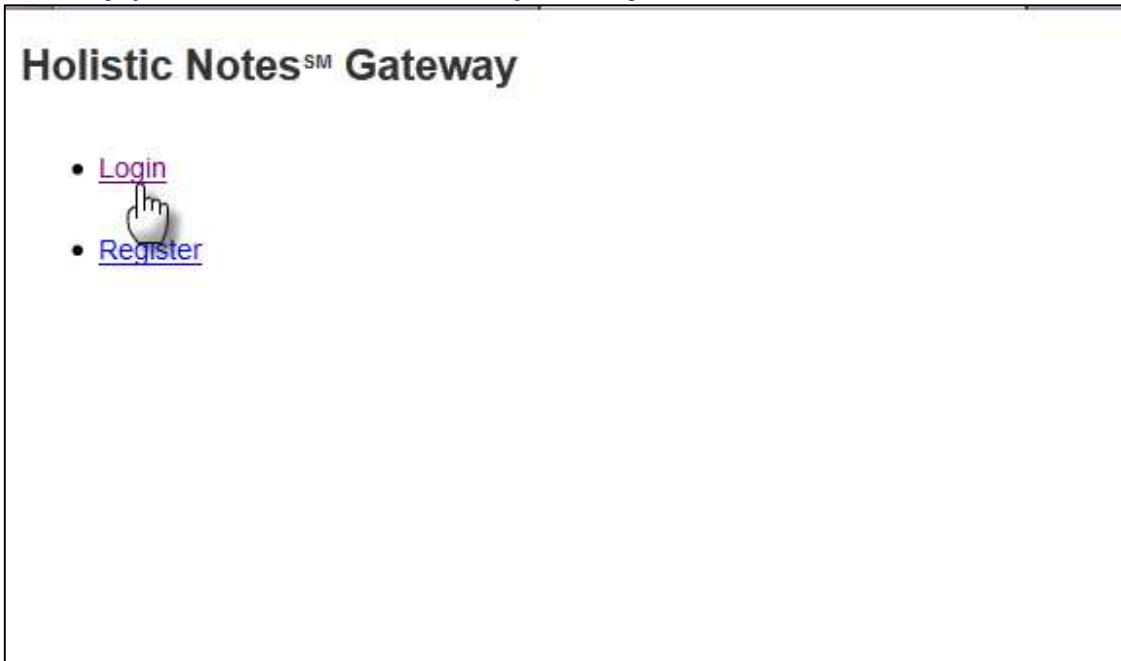
Your clinic name

**Practitioner link to Holistic Notes EHR**

**ORDER TODAY!**  
 TO ORDER CALL  
**508. 583.2565**  
 OR  
[E-MAIL US](#)


### Login (step 2)

This brings you to the Holistic Notes Gateway, click [Login](#).

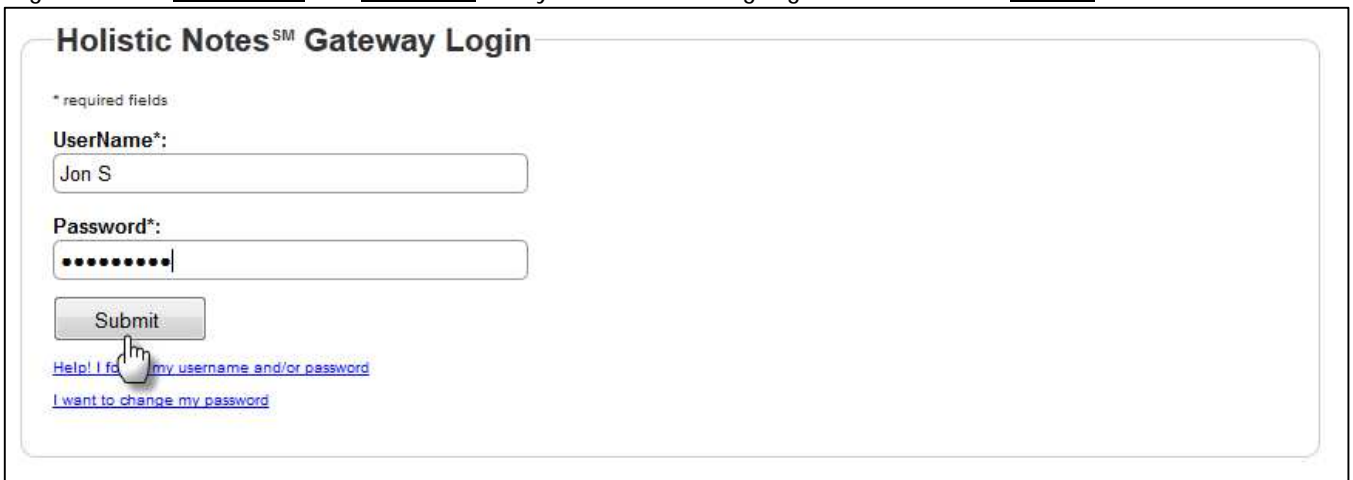


### Login (step 3)

The Holistic Notes Gateway brings you to your office's custom Holistic Notes EHR website. This gateway is an important security feature and we recommend that you use a strong password. Your password can easily be changed by clicking [I want to change my password](#).

Clicking [submit](#) transfers you to secure servers with military/bank grade encryption and government grade backups and security. The padlock icon  in your browser's status bar indicates that all transmissions to and from this site are encrypted. (This security layer uses 256-bit encryption technology)

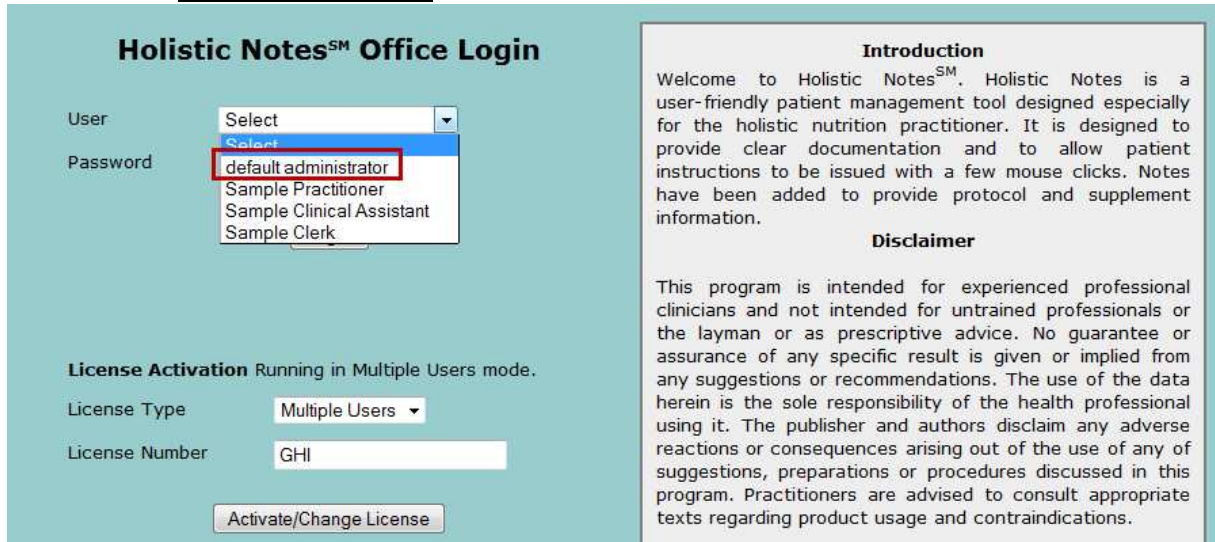
Login with the **User Name** and **Password** that you created during registration and click [Submit](#).



### Login (step 4)

This is your office login, here you, other practitioners in your office and authorized staff login with their own passwords; this complies with HIPAA rules and is covered in detail at the **Users** section of this guide.

1. Select **default administrator**



The screenshot shows the 'Holistic Notes<sup>SM</sup> Office Login' interface. On the left, there are input fields for 'User' and 'Password'. The 'User' dropdown menu is open, showing options: 'Select', 'default administrator' (highlighted with a red box), 'Sample Practitioner', 'Sample Clinical Assistant', and 'Sample Clerk'. Below these fields, there is a 'License Activation' section with 'License Type' set to 'Multiple Users' and 'License Number' set to 'GHI'. An 'Activate/Change License' button is at the bottom. On the right, there is a text box containing an 'Introduction' and a 'Disclaimer'.

2. Fill in the default password: **admin** and click **Log In**

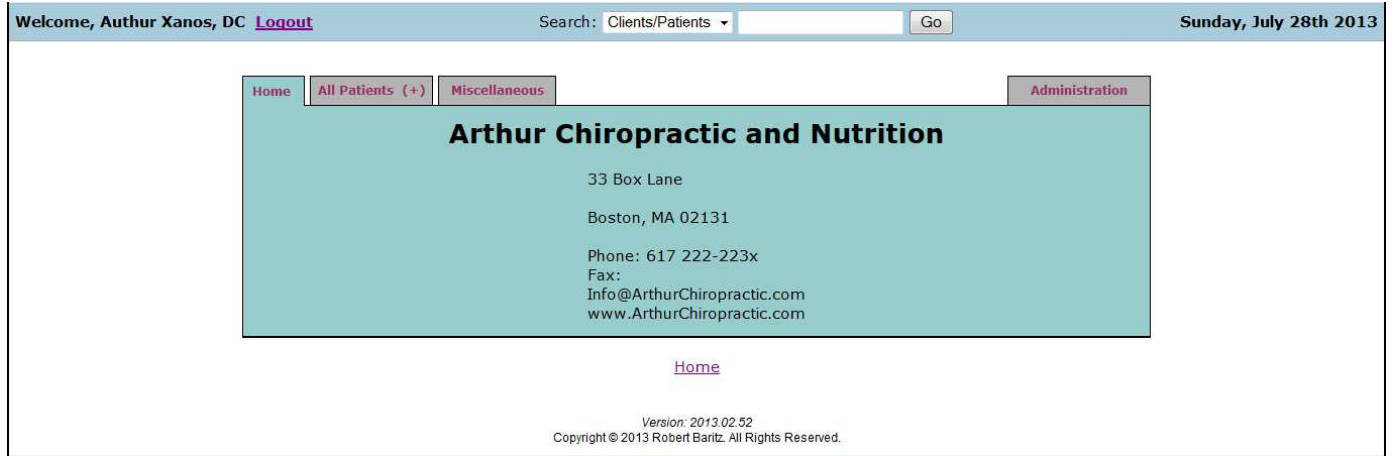


The screenshot shows the 'Holistic Notes<sup>SM</sup> Office Login' interface. The 'User' dropdown menu is now set to 'default administrator'. The 'Password' field contains six dots. A mouse cursor is hovering over the 'Log In' button. The 'License Activation' section and the right-hand text box remain the same as in the previous screenshot.



### The Home screen

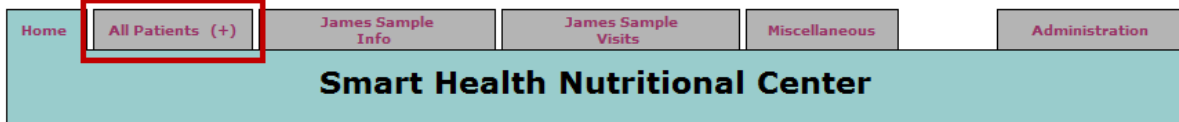
This brings you to the home screen from which you can access all *Holistic Notes* features, including editing user names and passwords. To add, edit or delete Users see the **Users** section of this guide.



## Entering and Editing Patient Info

### View Patients List

Click **All Patients** tab to view your **Patients list**.



### Patients List

1. Click **(+)** or **New Patient** to enter a new patient.
2. Click **View** to view or edit patient data.



### Patient Information page

1. Enter **Patient Number** or let it be automatically assigned. **Patient Number** can be edited later.
2. **First Name**, **Last Name**, **DOB** and **Gender** are the minimum data required for a new patient.
3. Click **Save** to save your data.

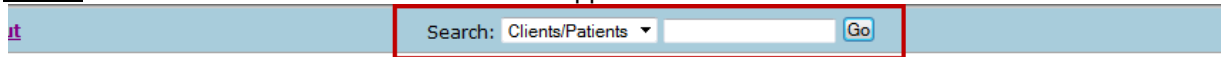
A screenshot of the 'Patient Information' form. The form contains the following fields and controls:

- Patient Number:** 3 (highlighted with a red box and a red arrow pointing to it)
- First Name:** John (highlighted with a red box)
- MI:** (empty)
- Last Name:** Sample (highlighted with a red box)
- Home Phone:** (empty)
- Work Phone:** (empty)
- Cell Phone:** (empty)
- Email:** (empty)
- Address 1:** (empty)
- Address 2:** (empty)
- City:** (empty)
- State:** (dropdown menu)
- Zip:** (empty)
- DOB:** 01/12/1980 (ex. mm/dd/yyyy) (highlighted with a red box)
- Gender:** Male (dropdown menu) (highlighted with a red box)
- Save:** (button) (highlighted with a red box)

## Search Function

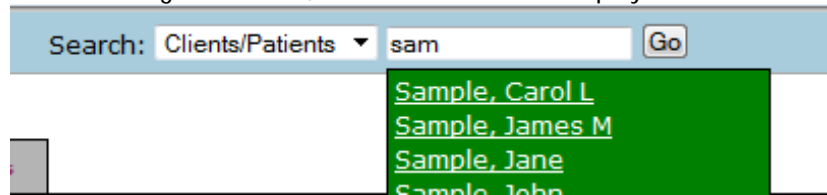
### Search Function

Use **Search** to enter an office visit or view user and supplement info.



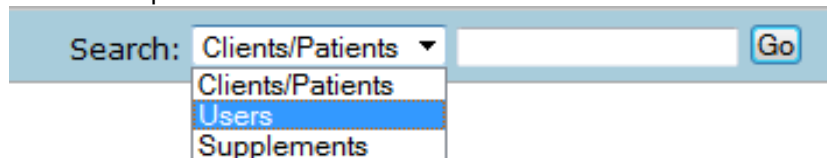
### To open a new office visit

To open a patient file start entering their name, then select from the display.

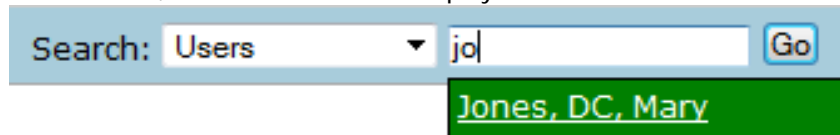


### To view or edit a user's information

1. Select **Users** from the dropdown to view or edit user info.

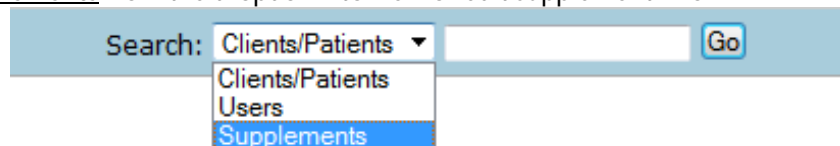


2. Start to enter their name, then select from the display.

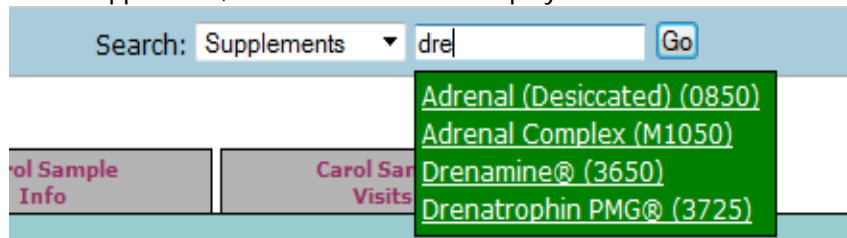


### To view or edit information for a specific supplement

1. Select **Supplements** from the dropdown to view or edit supplement info.



2. Start to enter the supplement, then select from the display.



### Office Visit - Overview

The main feature of *Holistic Notes* is the **Office Visit** page. Here all necessary patient information is easily added and the patient's take home **Supplement Schedule** is extracted and printed with a few clicks. As a convenient starting point the **Office Visit** page is preloaded with the information from the last saved visit.

1. The **Date** of the office visit is automatically displayed.
  2. **Subjective** information is entered here
  3. **Data** can be used to enter objective data, current medical info (illnesses, allergies, medication), and historical data (surgeries, pregnancies, significant injuries and illnesses)
  4. The **Body Scan** column is used to select body scan/reflex areas.
  5. **Pulse** can be used if you pulse **Body Scan** areas.
  6. The **Notes** column is used to enter notes that correspond to each **Body Scan** area.
  7. The **Recommendations** area displays supplements for each **Body Scan** area along with special instructions, and date first recommended.
  8. **Calculate supplements**: allow you to set weeks and/or months till next visit, so Holistic Notes can calculate the number of tablets needed and the cost of supplements till the next visit.
  9. The **Practitioner** name is atomically displayed and a clinical **Assistant** can be selected.
  10. The **Plan** area is where patient directions are entered.
- The **Lock this visit** box and **Save** button allow the visit to be saved and locked.

Home
All Patients (+)
John Sample Info
John Sample Visits
Miscellaneous
Administration

Visit Information for

## John Sample

Visit # 2

1 Date: 07/17/2013

[Print Latest Office Visit](#)

< >

Save Clear Cancel

Editing the most recent unlocked visit.

2 **[+] Subjective**  
 Taking all supplements about 90%  
 Headaches: have been bad for the last two weeks.  
 Constipation: having a BM about 2 x's a week

3 **[+] Data**  
 None

4 Del	Body Scan	5 Pulse	6	Notes	7	Recommendations
<input type="checkbox"/>	Regulation (blocked) ▾	▾	[+]	Gluten	[+]	3 Zyan 8475 (07/17/2013)
<input type="checkbox"/>	Switching (no) ▾	▾	[+]		[+]	
<input type="checkbox"/>	Adrenal (left) ▾	4 ▾	[+]		[+]	4 Drenamin 3650 (07/17/2013)
<input type="checkbox"/>	Gall Bladder ▾	0 ▾	[+]	GB removed	[+]	6 A-F Betafood 0825 (07/17/2013) 2 Livton Complex M1372 (07/17/2013)
	Select ▾	▾	[+]		[+]	

8 **Calculate supplements:** (months) 1 ▾ (weeks) 0 ▾ **Visit total: \$141.00**

9 **Practitioner**  
 John Smart, DC  
**Assistant**  
 ▾

10 **[+] Plan**  
 Next visit in two weeks.  
 Avoid wheat.

11  Lock this visit

Save

### Office Visit – Subjective & Data

The **Subjective** and **Data** areas work the same. The **Subjective** area is for entering visit to visit subjective information. The **Data** area can be used to record objective info, chronic illness, medications, allergies, medical and family history.

1. Click **[+]** next to the area you wish to edit.

Visit Information for **John Sample**  
Visit # 2  
Date: 07/17/2013

Print Latest Office Visit

Save Clear Cancel

< >

**Editing the most recent unlocked visit.**

**[+] Subjective**  
Taking all supplements about 90%  
Headaches: have been bad for the last two weeks.  
Constipation: having a BM about 2 x's a week

**[+] Data**  
Illnesses: Diabetic II  
Medications: Metformin

2. Enter information in the text pop-up box and/or
3. Use point and click text (adding, editing and deleting point and click text is covered in the Point and Click section of this guide).
4. Click **Save & Close** to return to the Office Visit page

### Subjective

Save & Close Cancel Clear

John Sample Visit # 1

**Subjective**

Taking supplements: about 90%  
Headaches: slightly improved over the last two weeks  
Constipation: having BM about 2x/wk  
Low energy: about the same

Click on the subjectives below to activate them.

**Subjective**

Constipation  
Headaches  
PMS

Save & Close

### Office Visit – Body Scan areas

**Body Scan** areas represent the body areas, reflex points or body systems used in determining supplement recommendations. Some practitioners use a system of kinesiology and **Body Scan** areas relate to the kinesiology test points. Other practitioners make recommendations by history and exam in that case the **Body Scan** relates to body systems: Cardiovascular, GI, Immune, endocrine, etc. We have even added an **Other** option, that way you can select an area on the fly and list tested area in **Notes** next to it. For more info see **Notes** and **Body Scans** in this Guide.

#### Entering Body Scan areas

1. Click **Select** to activate the **Body Scan** area selection.



2. Enter the first letter of the **Body Scan** area and chose from the display.



3. The **Body Scan** area will now display on the Office Visit page.



4. Use the **Pulse** dropdown to record a pulse to that **Body Scan** area if needed.



### Office Visit – Notes

The Notes section is very useful in keeping track of issues relating to specific Body Scan areas. You can note supplements recommended and the result, past treatments and surgeries to that area, special medical issues, results of specialized testing, etc. This forms a powerful memory of important issues allowing your practice volume to increase without sacrificing specifics for each patient.

#### Entering Notes at the Office Visit

Click **[+]** to enter **Notes** relating to a specific **Body Scan** area.

Visit Information for **Carol L Sample**

Editing the most recent unlocked visit.

**Visit #1**  
Date: 09/29/2012

**Subjective**  
She states she has been having very bad migrane headaches 5 or 6 times a month and they can last all day.

Del	Body Scan	Pulse	Notes	Recommendations
	Regulation (blocked)	0	[+]	[+]
	Select	0	[+]	[+]

#### Notes pop-up

1. Enter any notes about the **Body Scan** area, by typing or point and click phrases.
2. Click **Save & Close** to return to the Office Visit page.

**Notes**

Carol L Sample **Visit # 1**

**Area**  
Regulation (blocked)

**Findings**  
Milk sensitivity

Save & Close

#### Office Visit Notes display

The Office Visit **Notes** box now displays the information entered.

Editing the most recent unlocked visit.

**Visit #1**  
Date: 09/29/2012

**Subjective**  
She states she has been having very bad migrane headaches 5 or 6 times a month and they can last all day.

Del	Body Scan	Pulse	Notes	Recommendations
	Regulation (blocked)	0	Milk sensitivity	[+]
	Select	0	[+]	[+]

## Office Visit – Recommendations

**Holistic Notes can calculate number of pills need and cost of supplements for a specified period.**

1. Use the Calculate supplement dropdowns to set calculation period.
2. then click the **[+]** to activation the **Recommendations** popup.

Visit Information for [Print Latest Office Visit](#)

### Carol L Sample

Visit # 1 Save Clear Cancel

Date: 07/22/2013 < >

**Editing the most recent unlocked visit.**

**[+] Subjective**  
Having bad migraine headaches 5 or 6 times a month, can last all day

**[+] Data**  
None

Del	Body Scan	Pulse	Notes	Recommendations
<input type="checkbox"/>	Adrenal (left)		[+]	[+]
	Select		[+]	[+]

Select the months and weeks for supplement cost calculations.

Add Area Calculate supplements: (months) 1 (weeks) 0 Visit total: \$0.00

**Practitioner**  
John Smart, DC [+] Plan

**Assistant**

### The Recommendations pop-up has several useful displays

### Recommendations

Close Cancel Clear

Patient name

Visit # 1

Patient  
Carol Sample

Body Scan Areas  
Adrenal (left)

Body Scan Area being addressed

Most common Stressors

- [Bacterial](#)
- [Chemical Toxicity](#)
- [Food Allergy](#)
- [Generalized Immune](#)
- [Heavy Metal Toxicity](#)
- [Parasitic](#)
- [Scurvy](#)
- [Viral](#)
- [Yeast](#)

Woodworm Complex (parasite 1, 2), Zymex II (parasite 3, 4)-DRAINAGE: Garlic

Area specific suggested products

**Adrenal (left)**  
Drenamin (3650), Drenatrophin PMG (3475), B6 Niacinamide (1275), Desiccated Adrenal (0850). MH: Adrenal Cplx (M1050), Rhodiola & Ginseng Cplx (M1393), Withania Cplx (M1483), Licorice High Grade (M790).

Hovering the cursor over a stressor displays suggested supplements.

Supplement	Start Date	Upon Rising	Break fast	10 am	Lunch	3 pm	Dinner	7 pm	Before Sleep	Comments
		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	

Calc Needed:  \$ X 0 = \$0.00

**Description:**

**Visit total: \$**

Add Row Save & Close



### Office Visit – Recommendations (Supplement Selection)

In addition to usual information such as supplement and dose, *Holistic Notes*:

- Displays a supplement **Description** that will show on the patient’s take home **Supplement Schedule**.
- Displays **Info** about vegetarian products, gluten free products, products that contain common food sensitivities, and potential herb-drug interactions, for the practitioner.
- *Holistic Notes* facilitates entry of the **Start Date** the supplement was first recommended, to make it easier to assess effectiveness over time and to discontinue or change supplements accordingly.
- *Holistic Notes* provides a means to enter special instructions (**Comments**) for each supplement. This can be accomplished by text entry or dropdown selection from preloaded phrases. More information on **Comments** preloads and how to create your own are covered in the **Supplement Phrases** section of this user guide.
- New supplements to your patient’s program are identified on the Supplement Schedule with a bullet. There is a check box in the recommendations screen so you can override this or add the bullet to other supplements.

#### Entering Supplements

Supplement	Start Date	Upon Rising	Break fast	10 am	Lunch	3 pm	Dinner	7 pm	Before Sleep	Comments
dre										

Drenamin (3650) 90T \$11.00

Drenamin (3700) 360T \$38.00

Drenatrophin PMG (3725) 90T \$12.00

Enter first few letters of supplement name, then choose the supplement and bottle size from the drop down menu.

Add Row Save & Close

#### Supplement displays

Supplement	Start Date	Daily	Upon	Break	Dinner	7 pm	Before Sleep	Comments
Drenamin								

Product ID, bottle size & cost

New    Calc    Needed:    (3650) 90T \$11.00 X 0 = \$0.00

**Description:** [Click for supplement description & info](#)

New supplement will be identified with a bullet on Supplement Schedule

Add Row Save & Close

Supplement	Start Date	Daily	Upon	Break	10 am	Lunch	3 pm	Dinner	7 pm	Before Sleep	Comments
Drenamin											

Supplement Description

Calc    Needed:    (3650) 90T \$11.00 X 0 = \$0.00

**Description:** HOW DRENAMIN KEEPS YOU HEALTHY: Support healthy adrenal gland function, helps maintain cellular health, provides sources of vitamins and minerals, enhances circulation and supports metabolic efficiency.\*

**Info:** Contains nutritional yeast


Practitioner Info

**Description:**  
**Visit total: \$0.00**


Add Row Save & Close

### Entering date product was recommended

Click the calendar icon and select **Today** to enter the date the supplement was first recommended.


Supplement	Start Date	Upon Rising	Break fast	10 am	Lunch	3 pm	Dinner	7 pm	Before Sleep	Comments
Drenamin		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="text"/>
Calc Needed: <input type="text"/> 1.00 X <input type="text"/> = \$0.00										
Description: Visit total: \$										

Calendar icon




### Entering dosage

You can enter specific times to take the supplement (in this example 2 with **Breakfast, Lunch and Dinner**).


Supplement	Start Date	Daily	Upon Rising	Break fast	10 am	Lunch	3 pm	Dinner	7 pm	Before Sleep	Comments
Drenamin	07/24/2013 	<input type="checkbox"/>	<input type="checkbox"/>	2	<input type="checkbox"/>	2	<input type="checkbox"/>	2	<input type="checkbox"/>	<input type="checkbox"/>	<input type="text"/>

Or enter the **Daily** dose (in this example 6)

Supplement	Start Date	Daily	Upon Rising	Break fast	10 am	Lunch	3 pm	Dinner	7 pm	Before Sleep	Comments
Drenamin	07/24/2013 	6	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="text"/>
Calc Needed: <input type="text"/> (3650) 90T \$11.00 X 0 = \$0.00											

### Entering Comments

The **Comments** area is for special directions which can be typed in or selected from a drop down menu. For information on how to add drop down items see the **Supplement Phrases** chapter in this user guide.

Supplement	Start Date	Daily	Upon Rising	Break fast	10 am	Lunch	3 pm	Dinner	7 pm	Before Sleep	Comments
Drenamin	07/24/2013 	<input type="checkbox"/>	<input type="checkbox"/>	2	<input type="checkbox"/>	2	<input type="checkbox"/>	2	<input type="checkbox"/>	<input type="checkbox"/>	<input type="text"/> <ul style="list-style-type: none"> <li>10 days on and 5 days off</li> <li>Best results if taken 2 t...</li> <li>Finish bottle &amp; check wit...</li> <li>Finish bottle and do not ...</li> <li>Rub vigorously on and acr...</li> <li>Take with a glass of warm...</li> <li>Take with a glass of water.</li> </ul>
Calc Needed: <input type="text"/> (3650) 90T \$11.00 X 0 = \$0.00											
Description: HOW DRENAMIN KEEPS YOU HEALTHY: Support healthy adrenal gland function, help provides sources of vitamins and minerals, enhances circulation and supports metabolic efficienc Info: Contains nutritional yeast											

### Calculating pill count, supplement cost and visit total for all supplements

1. Click the **Calc** to display the number of pills needed based either on the Daily amount or the total of the specific times.
2. Use the drop down menu to select the number of bottles, the cost will then be displayed
3. The **Visit total** gives a running update of the cost.
4. Click **Save & Close** when done.

Supplement	Start Date	Daily	Upon Rising	Break fast	10 am	Lunch	3 pm	Dinner	7 pm	Before Sleep	Comments
Drenamin	07/25/2013	<input type="checkbox"/>	<input type="checkbox"/>	2	<input type="checkbox"/>	2	<input type="checkbox"/>	2	<input type="checkbox"/>	<input type="checkbox"/>	
<b>Calc</b> Needed: 180 (3650) 90T \$11.00 X 2 = \$22.00											
<b>Description:</b> HOW DRENAMIN KEEPS YOU HEALTHY: Support healthy adrenal gland function, helps maintain cellular health, provides... <b>Info:</b>											
B6-Niacinamide	07/25/2013	<input type="checkbox"/>	<input type="checkbox"/>	4	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
<b>Calc</b> Needed: 240 (1275) 90T \$10.50 X 3 = \$31.50											
<b>Description:</b> <b>Visit total: \$75.50</b>											
<input type="button" value="Add Row"/> <input type="button" value="Save &amp; Close"/>											

### Updated Office Visit display & Plan pop-up activation

1. The supplement, dose, supplement specific directions, and date prescribed are displayed for easy reference.
2. The **Visit total** is displayed.
3. The **↑** icons on the left permit re-ordering the reflex area rows if that becomes necessary.
4. Click **[+]** under Plan to open the **Plan** pop-up.

**Carol Sample**  
Visit # 1  
Date: 07/22/2013

Visit Save Clear Cancel

---

**Editing the most recent unlocked visit.**

**[+] Subjective**  
Having bad migraine headaches 5 or 6 times a month, can last all day.

**[+] Data**  
None

Del	Body Scan	Pulse	Notes	Recommendations
<input type="checkbox"/>	Regulation (blocked) ↓	↓	[+] Milk sensitivity	[+] 5 Zypan 8500 Finish bottle & check with doctor before reorder (07/23/2013)
<input type="checkbox"/>	Switching (no) ↓	↓	[+] Dose	[+] ↑
<input type="checkbox"/>	Adrenal (left) ↓	↓	[+] Date first prescribed	[+] ↑
	Select ↓	↓	[+] ↑	[+] ↑

**Calculate supplements:** (months) 1 (weeks) 0 **Visit total: \$53.50**

**Practitioner:** Authur Xanos, DC  
**Assistant:** ↓

**[+] Plan**  
Click to open Plan pop-up

Visit total

## Office Visit – Plan

### Entering data in the Office Visit Plan

1. Patient directions are usually entered using point-and-click phrases, but can also be typed in. (See the **Plans** chapter in this user guide, to create your own point and click phrases)
2. Click **Save & Close** when done.

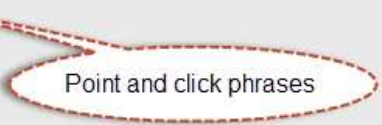
### Plan

Carol L Sample	<b>Visit # 1</b>
<b>Plan</b>	<div style="border: 1px solid gray; min-height: 100px; padding: 5px;">Next visit in 4 weeks Avoid milk</div>

Click on the plans below to activate them.

#### Plans

- [Fill out Diet Diary](#)
- [Next visit in 1 week](#)
- [Next visit in 2 weeks](#)
- [Next visit in 3 weeks](#)
- [Next visit in 4 weeks](#)
- [Next visit in 6 weeks](#)
- [Next visit in 8 weeks](#)



## Office Visit – Completed & Locked

### The Completed Office visit

1. The completed office visit is now displayed.
2. To print the patient’s take home **Supplement Schedule** select **Miscellaneous > Supplement Schedule**.
3. Click **Lock this visit** and **Save** to lock and save the visit. Locked visits cannot be altered or deleted. The locked visit retains the Electronic Signature of the User who created it and the date when it was first created, even if it was locked by a later date.
4. After the visit is locked a “new” **Office Visit** will be displayed based on the data from the saved visit, this “new” **Office Visit** will not be activated till new data is entered.

Home | All Patients (+) | Carol Sample Info | Carol Sample Visits | Miscellaneous | Administration

Visit Information for **Carol Sample** [Print Latest Office Visit](#)

Click to print Supplement Schedule

Editing the most recent unlocked visit.

**[+] Subjective**  
Having bad migraine headaches 5 or 6 times a month, can last all day.

**[+] Data**  
None

Del	Body Scan	Pulse	Notes	Recommendations
<input type="checkbox"/>	Regulation (blocked)		<b>[+]</b> Milk sensitivity	<b>[+]</b> 6 Zypan 8500 <i>Finish bottle &amp; check with doctor before reorder (07/25/2013)</i>
<input type="checkbox"/>	Switching (no)		<b>[+]</b>	<b>[+]</b>
<input type="checkbox"/>	Adrenal (left)		<b>[+]</b>	<b>[+]</b> 6 Drenamin 3650 (07/25/2013) 8 B6-Niacinamide 1275 (07/25/2013)
	Select		<b>[+]</b>	<b>[+]</b>

Calculate supplements: (months) 1 (weeks) 0 **Visit total: \$53.50**

**Practitioner**  
Authur Xanos, DC

**Assistant**

**[+] Plan**  
Next visit in 4 weeks  
Avoid milk

Check this box, then click Save  Lock this visit

### Miscellaneous Functions

Advanced Printing, Lock All Visits, Consultations, Supplement Schedule printing and the Help page are all under Miscellaneous.

The screenshot shows a navigation bar with tabs: Home, All Patients (+), Carol Sample Info, Carol Sample Visits, Miscellaneous, and Administration. The 'Miscellaneous' tab is active, displaying a list of options: Advanced Printing, Lock All Visits, Consultation, Supplement Schedule, and Help. The background shows a patient record for Carol Sample, Visit # 11, dated 12/10/2014, with a 'Print Latest Office Visit' link and navigation arrows.

### Lock All Visits

Selecting the Lock All Visits option allows you to lock all visits and consultations at the end of the day instead of locking them one at a time. The lock visits screen displays the date and time when the visits were last locked and the name of the user who deployed that option.

The screenshot shows the 'Lock All Unlocked Visits and Consultations' screen. It features a navigation bar with tabs: Home, All Patients (+), Carol Sample Info, Carol Sample Visits, Miscellaneous, and Administration. The 'Miscellaneous' tab is active. The main content area displays 'Locked on: 2014-12-10 09:13:48' and 'Locked by: Carmen Pinto'. A 'LOCK ALL' button is visible, with a callout bubble pointing to it that says 'Click to lock visits & consultations'.

### Supplement Schedule & Estimate

The patients take home **Supplement Schedule** has a clean professional look that builds confidence in your practice. It identifies your office, the patient and the date it was created. It lists recommended supplements, when they should be taken; any supplement specific directions as well as general directions (**Plan**). This is followed with a description of each supplement including any cautions or contraindications. These descriptions are fully customizable which is covered in the **Supplements** section of this user guide. To e-mail the **Supplement Schedule** select **File > Save as >** then save to your desktop as a PDF and e-mail as an attachment.



## Supplement Schedule

Baritz Wellness Center – 450 Pleasant St. Brockton, MA 02301 – 508 583-2565  
 drb@baritzwellness.com – www.baritzwellness.com

---

**For:** Carol Sample      **Date:** December 10th, 2014

---

Supplement	Daily	Upon Arising	Break-fast	10 am	Lunch	3 pm	Dinner	7 pm	Before Sleep
<b>Zypan 8500</b> Finish bottle & check with doctor before reorder			2		2		2		
<b>Drenamin 3650</b>			2		2		2		
<b>• Adrenal Complex M1055</b>			2				2		

**Plan**  
 Next visit in four weeks  
 Avoid Milk

**Supplement Descriptions**  
**Zypan 8500** Zypan combines pancreatin, pepsin, and betaine hydrochloride to facilitate healthy digestion.\* Chewing this product is not recommended.  
**Drenamin 3650** Drenamin supports adrenal function and helps maintain emotional balance.\*  
**Adrenal Complex M1055** [Licorice, Rehmannia] helps to restore adrenal function to reduce the effects of stress on the body; support adrenal gland health and energy production to help combat fatigue; help the body adapt to the challenges of everyday life, promote the normal resistance function; and support a healthy immune system when experiencing occasional stress.  
 CAUTION: ~~Contraindicated in high blood pressure, edema (water retention), congestion heart failure, low blood potassium, pregnancy and lactation.~~

### Supplement Estimate Features

The supplement estimate prints the number of pills needed, the bottle costs and the total cost. This makes the purchasing process easy and convenient for patients and clinic staff.

**Supplement Estimate**  
**1 Month(s), 0 Week(s)**

Arthur Chiropractic and Nutrition – 33 Box Lane Boston, MA 02131 – 617 222-223x  
rbaritz@aol.com – www.ArthurChiropractic.com

For: Carol Sample      Date: July 25th, 2013

Needed	Product	ID	Content	Price	Qty	Ext Price
180	Zypan	8500	330T	41.00	0	\$0.00
120	Drenamin	3650	90T	11.00	2	\$22.00
	Adrenal Complex	M1050	40T	21.00	3	\$63.00
<b>Total</b>						<b>\$85.00</b>

### Printing the Supplement Schedule

1. To print press **Control + P** or click the **Print** icon
2. Use the **back arrow** to return to the Office visit page.





## Consultation

The **Consultation** page is a free entry text box for those times when you want to make notes in the patient file, such as a quick in the office consult, a phone consult, record your notes on lab tests, etc.

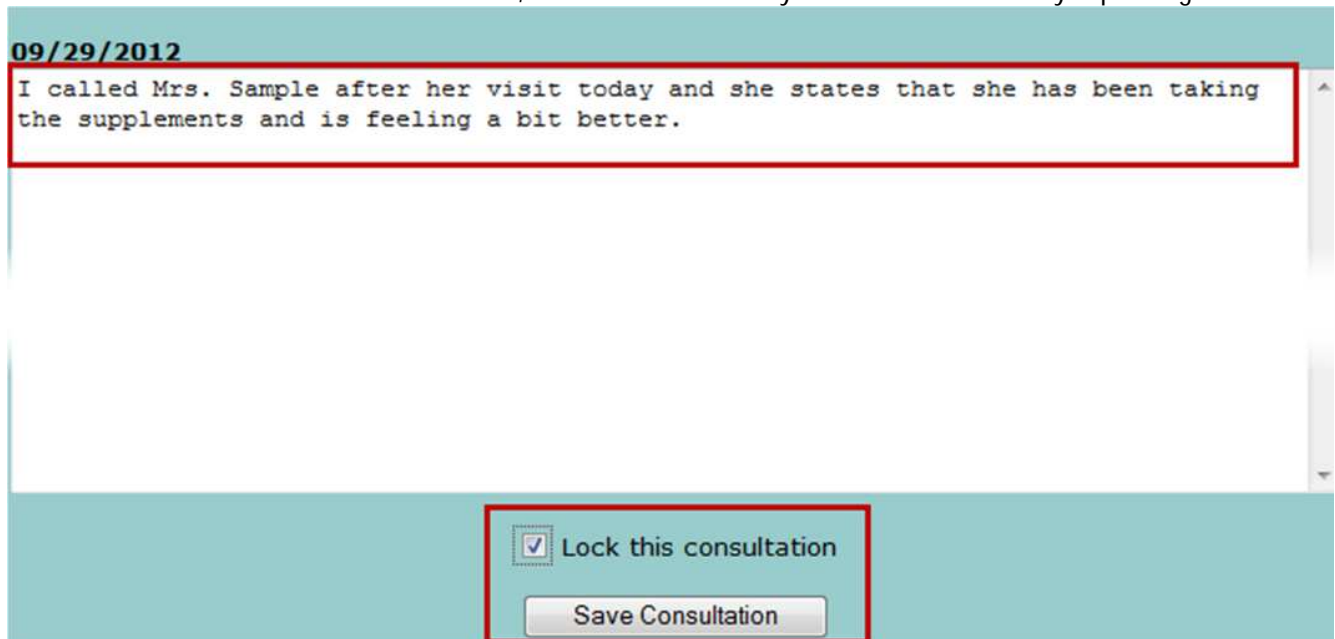
### Accessing the Consultation page

To access the **Consultation** select **Miscellaneous > Consultation**



### Consultation data entry

1. Enter data as needed.
2. Click **Save Consultation** to save your data.
3. Check **Lock this consultation** and click **Save this consultation** to lock and save the consultation.
4. Once locked a new **Consultation** text box will be displayed, which becomes active when new data is entered.
5. Locked **Consultations** cannot be altered, corrections are usually made with a new entry explaining the error.



### Advanced Printing (printing & downloading)

Who owns your data? You do. While some EHR programs require you maintain special software to access your data, *Holistic Notes* was designed to convert patient data to PDF format that can be downloaded, stored on your computer and accessed with any generic PDF reader. This way you can enjoy the benefits of *Holistic Notes*, while still maintaining independent control over your data.

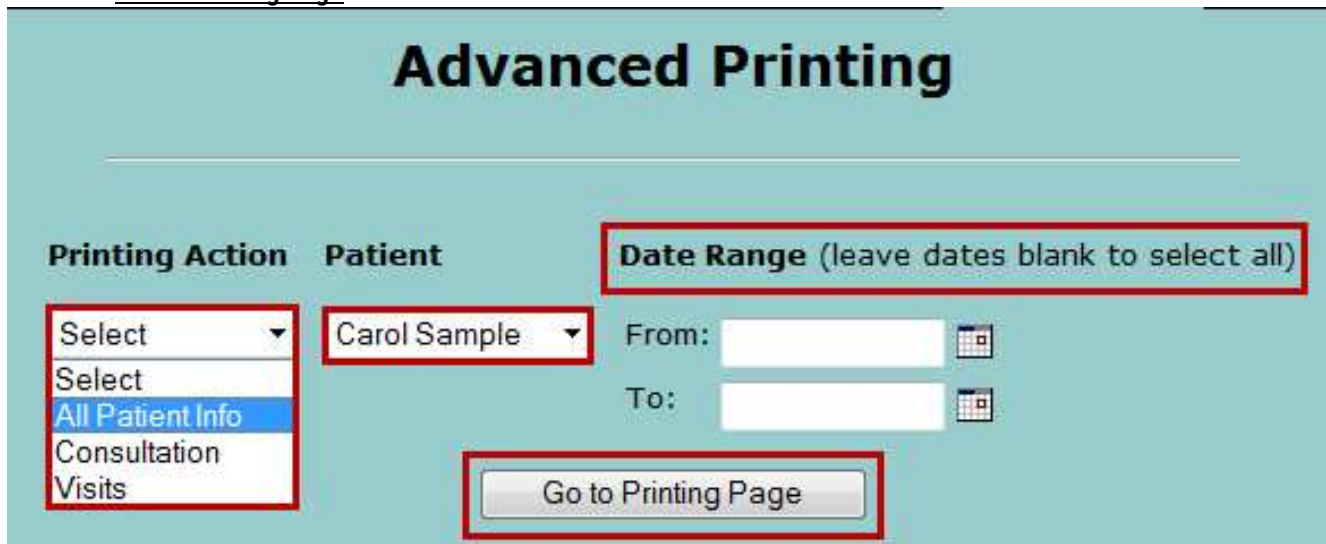
#### Office Visit quick print and accessing Advanced Printing functions

1. Click **Print Latest Office Visit** for a quick print.
2. Select **Miscellaneous > Advanced Printing** to access advanced print functions and to download your data.



#### Advanced Print functions

1. Under **Printing Action** select **All Patient Info** to print **Patient Info**, **Office Visits** and **Consultations** or select **Visits** or **Consultation** as needed.
2. Under Patient enter a few letters of the patient's name and select from the display.
3. Select a specific **Date Range** or leave blank to select all.
4. Click **Go to Printing Page**.



#### Printing and downloading your data

1. Your patient's data has been converted to a PDF document which can be printed or saved to your computer.
2. To download press **Shift + Ctrl + S** or use the save icon.
3. To print press **Ctrl + P** or use the print icon.



## Help

Perhaps the fastest way to learn Holistic Notes is to get the "big picture" by watching the videos on the Help page and then follow the User Guide step-by-step to get the detail.

The downloadable User Guide is fully illustrated and indexed to serves as a ready reference on specific Holistic Notes program functions.

### Accessing the Help page

To access the **Consultation** select **Miscellaneous** > **Help**

Home	All Patients (+)	Carol Sample Info	Carol Sample Visits	Miscellaneous		Administration
Visit Information for <b>Carol Sample</b> Visit # 1 Date: 07/22/2013			<a href="#">Print Latest Office Visit</a> <input type="button" value="&lt;"/> <input type="button" value="&gt;"/>	<a href="#">Advanced Printing</a> <a href="#">Consultation</a> <a href="#">Supplement Schedul</a> <a href="#">Help</a>		

### Help page

Home	All Patients (+)	Carol Sample Info	Carol Sample Visits	Miscellaneous		Administration
<h2>Help</h2> <h3>Orientation / Tutorials</h3> <p>Our resource library is intended to help you get the most out of <i>Holistic Notes</i><sup>SM</sup>. Perhaps the fastest way to learn <i>Holistic Notes</i> is to watch the videos to get the "big picture", then follow the User Guide step-by-step for the detail.</p> <p><b>Videos:</b></p> <ul style="list-style-type: none"><li><a href="#">Introduction and Log-in</a> (1 minute)</li><li><a href="#">Office Visit Page</a> (2 minutes)</li><li><a href="#">Office Visit Page Detail</a> (7 minutes)</li><li><a href="#">Home Page and Patient Info</a> (1 minute &amp; 30 seconds)</li></ul> <p><b>Printable User Guide:</b></p> <ul style="list-style-type: none"><li><a href="#">Holistic Notes User Guide (PDF)</a></li></ul>						

## Administrative Functions

Administrative Functions allow you to customize Holistic Notes for your office. These functions are available to users with Administrator privileges. For more information about user privileges see the **Users** section of this guide.

The screenshot displays the software interface for editing a patient visit. At the top, there is a navigation bar with tabs: Home, All Patients (+), Carol Sample Info, Carol Sample Visits (active), Miscellaneous, and Administration. The main content area is titled "Visit Information for Carol Sample" and includes "Visit # 1" and "Date: 07/22/2013". A "Print Latest Office Visit" link is present, along with "Save" and "Clear" buttons. Below this, a message states "Editing the most recent unlocked visit." The main editing area contains two sections: "Subjective" with the text "Having bad migraine headaches 5 or 6 times a month, can last all day." and "Data" with the text "None". On the right side, a vertical menu under the "Administration" tab lists various administrative functions: Body Scans, Data Phrases, Manufacturers, Note Phrases, Office Information, Plan Phrases, Stressors, Subjective Phrases, Supplement Phrases, Supplements, and Users.

## Body Scans

Each system of kinesiology uses a specific set of **Body Scan** areas and many practitioners base their recommendations on history and exam of body systems. As a convenient starting point you are given the opportunity to select a method of analysis to be preloaded into your *Holistic Notes* EHR. Once you have logged into *Holistic Notes* you can easily create and edit **Body Scan** areas.

### Accessing Body Scan/Reflex Area data

To access **Body Scan**/Reflex area data select **Administration** > **Body Scans** to access the **Body Scan Table**.

The screenshot shows a navigation menu at the top with tabs: Home, All Patients (+), Carol Sample Info, Carol Sample Visits, Miscellaneous, and Administration. The Administration tab is selected, and a dropdown menu is open, highlighting 'Body Scans'. Other items in the dropdown include Data Phrases, Manufacturers, Note Phrases, Office Information, Plan Phrases, Stressors, Subjective Phrases, Supplement Phrases, Supplements, and Users. Below the menu, the patient information for Carol Sample is displayed: Visit # 1, Date: 07/22/2013. There are buttons for 'Print Latest Office Visit', 'Save', and 'Clear'. A message states 'Editing the most recent unlocked visit.' Below this, there are sections for 'Subjective' (Having bad migraine headaches 5 or 6 times a month, can last all day.) and 'Data' (None).

### The Body Scan Table

Click **New Body Scan** to create a new **Body Scan** area.

The screenshot shows the 'Body Scan Table' interface. At the top, there is a 'New Body Scan' button highlighted with a red box. Below it are navigation arrows and a 'Page: 1' indicator. The table lists various body scan areas with 'Modify' and 'Remove' links for each. The 'Remove' link for 'Bladder' and the 'Modify' link for 'Brain/CSF' are highlighted with red boxes.

Body Scan	Modify	Remove
Adrenal (left)	<a href="#">Modify</a>	<a href="#">Remove</a>
Adrenal (right)	<a href="#">Modify</a>	<a href="#">Remove</a>
Bladder	<a href="#">Modify</a>	<a href="#">Remove</a>
Bones & Joints	<a href="#">Modify</a>	<a href="#">Remove</a>
Brain (crown)	<a href="#">Modify</a>	<a href="#">Remove</a>
Brain (frontal)	<a href="#">Modify</a>	<a href="#">Remove</a>
Brain (general)	<a href="#">Modify</a>	<a href="#">Remove</a>
Brain/CSF	<a href="#">Modify</a>	<a href="#">Remove</a>
Breast (left)	<a href="#">Modify</a>	<a href="#">Remove</a>
Breast (right)	<a href="#">Modify</a>	<a href="#">Remove</a>

Click **Remove** do delete an area, deleting an area will not affect past locked visits.

For this example we will select **Modify**.

### Body Scan Information Page

Holistic Notes comes preloaded with body scan areas and recommended supplements for those areas. Entering data in the Recommendations (Custom) box over rides the preloaded recommendations.

To save your changes be sure to click **Save** before returning to the **Body Scans Table**.

Body Scan Information for  
**Brain/CSF**  
Body Scans Table

< New Record >

Save

**Body Scan** Brain/CSF

**Recommendations**  
SP: Cal-Amo (1710), Neurotrophin PMG (5900), Neuroplex (5850), Cataplex B/G (B-1200, G-4500) Cataplex B12 (1325), Lecithin, Organically Bound Minerals (6275), Calcium Lactate (1865), Supper EEF (7675). MH: Withania (M1380), Bacopa Cplx (M1130), Valerian Cplx (M1150), Antronex (1100), Albizia (M1100) if Antronex 12+

**Recommendations (Custom)**

Preloaded Recommendations

Your custom recommendations

## Manufactures

### Adding and editing Manufactures

To add or edit **Manufactures** select **Administration > Manufactures**.

### Manufactures Table

The **Manufactures Table** comes preloaded with Standard Process and Medi-Herb.

Each manufacture is assigned a **Manufacture ID** number by *Holistic Notes* for indexing.

Click **Modify** to modify a manufactures name

For this example I will select **New Manufacturer**.

### Manufacturer Information page

The **Manufacturer Name** is entered in a text box, be sure to click **Save** before returning to the **Manufactures Table**.

### Office Information

The **Office Information** page is where you enter your office information that will be displayed throughout the program as well as on the patient's take home **Supplement Schedule**. The **Disclaimer** is displayed on the bottom of the patient's take home supplement schedule. This page also provides numerous options for customizing the look of your *Holistic Notes* user interface, as well as the font size on the **Supplement Schedule**. To access the office information page select **Administration > Office Information**.

The screenshot shows the 'Office Information' page for 'Arthur Chiropractic and Nutrition'. At the top, there are navigation tabs: 'Home', 'All Patients (+)', 'Miscellaneous', and 'Administration' (which is selected). On the right side, there is a sidebar menu with options: 'Body Scans', 'Data Phrases', 'Manufacturers', 'Note Phrases', 'Office Information' (highlighted with a white arrow), 'Plan Phrases', 'Stressors', 'Subjective Phrases', 'Supplement Phrases', 'Supplements', and 'Users'. The main content area is titled 'Office Information for Arthur Chiropractic and Nutrition'. It contains several form fields: 'Office Name' (Arthur Chiropractic and Nutrition), 'Address 1' (33 Box Lane), 'Address 2', 'City' (Boston), 'State' (MA), 'Zip Code' (02131), 'Phone' (617 222-223x), 'Fax', 'Email' (Info@ArthurChiropractic.com), and 'Website URL' (www.ArthurChiropractic.com). Below these fields is a 'Disclaimer' section with a text box containing a disclaimer statement. To the right of the form fields are sections for 'Content', 'Tables', and 'Page Header', each with a 'Pick' button. Under 'Content', there are options for 'Background Color', 'Font Color', and 'Font Size' (7pt, 8pt, 10pt, 12pt, 14pt). Under 'Tables', there are options for 'Header Background Color' and 'Body Background Color'. Under 'Page Header', there is a 'Pick' button. At the bottom of the page, there is a 'Supplement Schedule' section with 'Font Style' options (smaller, larger) and a 'Set to Default Settings' button. A 'Save Office Information' button is located at the bottom right, with a callout bubble pointing to it that says 'Click here to save changes'. Another callout bubble points to the 'Font Size' options, saying 'Select font size for Supplement Schedule'.



### Stressors

Stressors are displayed in the supplement Recommendations pop-up along with the recommended products.

#### Access Stressor Information

To access Stressor information select **Administration** > **Stressors**.



#### Stressor Table & Stressor Information pages

1. In this example I have selected **Modify** from the **Stressor Table**.
2. In the **Stressor Information** page **Stressors** and **Recommendations** are entered in text boxes.



### Point & Click Phrases

At all text entry points you have the option of using Point & Click phrases, this is very useful because it avoid the necessity of typing the same phrase over and over. For example there are probably less than 25 directions that would be given to a patient, such as "Next visit in 1 week" or "Fill out diet diary." Point and click text can be created, edited and deleted through the **Administration** tab.



**Data Phrases, Note Phrases, Plan Phrases, Subjective Phrases** and **Supplement Phrases** are all created and edited the same way. The next couple of pages give some examples.

## Plan Phrases

### Access Plan Phrase preload information

**Plan Phrases** are preloaded statements that can be selected at the **Office Visit** when entering the patient's Plan. To access Plan preloads select **Administration > Plan Phrases**

The screenshot shows a patient record for Carol Sample, Visit # 1, dated 07/22/2013. The interface includes a navigation bar with tabs for Home, All Patients (+), Carol Sample Info, Carol Sample Visits, Miscellaneous, and Administration. The Administration menu is open, listing options such as Body Scans, Data Phrases, Manufacturers, Note Phrases, Office Information, Plan Phrases (highlighted with a white arrow), Stressors, Subjective Phrases, Supplement Phrases, Supplements, and Users. The main content area shows 'Editing the most recent unlocked visit.' with sections for Subjective (Having bad migraine headaches 5 or 6 times a month, can last all day.) and Data (None).

### Entering new Plan Phrases

The screenshot displays the 'Plan Phrases' management page. At the top, there is a 'New Plan Phrase' button with a callout bubble that says 'Click to create a new Plan Phrase'. Below the button are navigation controls: '<', 'Page: 1', '>', and '>>'. A list of plan phrases is shown, each with 'Modify' and 'Remove' links:

- Plan Phrase ▾
- Fill out Diet Diary [Modify](#) [Remove](#)
- Next visit in 1 week [Modify](#) [Remove](#)
- Next visit in 2 weeks [Modify](#) [Remove](#)
- Next visit in 3 weeks [Modify](#) [Remove](#)
- Next visit in 4 weeks [Modify](#) [Remove](#)
- Next visit in 6 weeks [Modify](#) [Remove](#)

### Plan Phrase Text Box

The screenshot shows the 'New Plan Phrase' form. It includes a breadcrumb 'Plan Phrases' and navigation buttons '<' and '>'. A callout bubble points to the text input field with the text 'Enter new phrase here'. Below the input field is a 'Save' button, with another callout bubble pointing to it that says 'Click to save'.

## Supplement Phrases

### Supplement Phrases

**Supplement Phrases** are preloaded statements that can be selected for a specific supplement in the supplement **Recommendations** pop-up. To access select **Administration > Supplement Phrases**.

Home | All Patients (+) | Carol Sample Info | Carol Sample Visits | Miscellaneous | Administration

Visit Information for **Carol Sample**  
Visit # 1  
Date: 07/22/2013

Print Latest Office Visit | Save | Clear

Editing the most recent unlocked visit.

- Subjective**  
Having bad migraine headaches 5 or 6 times a month, can last all day.
- Data**  
None

Administration menu items:  
Body Scans  
Data Phrases  
Manufacturers  
Note Phrases  
Office Information  
Plan Phrases  
Stressors  
**Supplement Phrases** (highlighted with arrow)  
Supplements  
Users

### Supplement Phrases Table

## Supplement Phrases

Click to create a new Supplement phrase

New Supplement Phrase

<< < Page: 1 > >>

Supplement Phrase	Modify	Remove
10 days on and 5 days off	<a href="#">Modify</a>	<a href="#">Remove</a>
Best results if taken 2 to 10 minutes before meal	<a href="#">Modify</a>	<a href="#">Remove</a>
Finish bottle & check with doctor before reorder	<a href="#">Modify</a>	<a href="#">Remove</a>
Finish bottle and do not reorder	<a href="#">Modify</a>	<a href="#">Remove</a>
Rub vigorously on and across scars 1 or 2x per day	<a href="#">Modify</a>	<a href="#">Remove</a>
Take with a glass of warm water.	<a href="#">Modify</a>	<a href="#">Remove</a>

### Supplement Phrase Text Box

Information for **New Supplement Phrase**

Supplement Phrases

< New Supplement Phrase >

Save

Supplement Phrase

Save

Enter new phrase here

Click to save

## Supplements

**Supplements** form the core of a nutrition practice; accordingly *Holistic Notes* provides useful data about each supplement including a **Description** with cautions and contraindications which is displayed for the practitioner in the **Recommendations** pop-up and on the patient's take home **Supplement Schedule**. Supplement **Info** just for the practitioner is also displayed in the **Recommendations** pop-up including herb-drug interactions and alerts for products that are vegetarian, gluten free, and those products that contain common food sensitivities such as peanuts and soy. *Holistic Notes* comes preloaded with these information displays; however the user can opt to have their text displayed instead by entering text in the **Description (Custom)** or **Info (Custom)** boxes. To access **Supplement Information** select **Administration** > **Supplements**.

The screenshot shows the patient information page for Carol Sample, Visit # 1, dated 07/22/2013. The page is titled "Editing the most recent unlocked visit." and shows a "Subjective" note about migraines and "Data" as "None". On the right side, there is a vertical navigation menu under the "Administration" tab. The menu items are: Body Scans, Data Phrases, Manufacturers, Note Phrases, Office Information, Plan Phrases, Stressors, Subjective Phrases, Supplement Phrases, **Supplements** (highlighted with a white arrow), and Users. There are also "Save" and "Clear" buttons on the page.

### The Supplements Table

New supplements can be added by clicking the **New Supplement** button, and there are **Modify** and **Remove** options for current supplements. Removing a supplement does not affect the documentation of past visits.

The screenshot shows the "Supplements Table" interface. At the top, there is a "New Supplement" button and a callout bubble that says "Click to create a new supplement". Below this is a pagination control showing "Page: 1" with navigation arrows. The table below lists various supplements with columns for Name, Product ID, Manufacturer, Quantity, and Price. Each row has "Modify" and "Remove" links.

Name	Product ID	Manufacturer	Quantity	Price	
Cataplex A	0500	Standard Process	90T	\$12.00	Modify Remove
Cataplex A-C	0575	Standard Process	90T	\$12.00	Modify Remove
A-C Carbamide	0625	Standard Process	90C	\$19.00	Modify Remove
A-C Carbamide	0635	Standard Process	270C	\$49.00	Modify Remove
Cataplex A-C-P	0700	Standard Process	90T	\$11.00	Modify Remove
Cataplex A-C-P	0750	Standard Process	360T	\$38.00	Modify Remove
A-F Betafood	0775	Standard Process	90T	\$13.00	Modify Remove
A-F Betafood	0825	Standard Process	360T	\$45.00	Modify Remove

### Supplement Information Page

Clicking **Add New Supplement** adds the supplement to your database. To keep the database consistent the **Manufacture, Product ID** and **Quantity** cannot be changed once added to your database. Other data can be overwritten using the **(Custom)** boxes. We update the default price for Standard Process and MediHerb products when Standard Process makes their updates.

Supplement Information for

## New Supplement

Supplements Table

Add New Supplement

---

Save

<b>Supplement Name</b>	<input type="text"/>	<b>(Required)</b>
<b>Manufacturer</b>	<input type="text" value="Select"/>	<a href="#">(Modify Manufacturer List)</a>
<b>Product ID</b>	<input type="text"/>	<b>(Required)</b>
<b>Quantity</b>	<input type="text"/>	
<b>Price</b>	<input type="text"/>	
<b>Price (Custom)</b>	<input type="text"/>	
<b>Description</b>		
<b>Description (Custom)</b>	<div style="border: 1px solid #ccc; height: 100px; width: 100%;"></div>	
<b>Info</b>		
<b>Info (Custom)</b>	<div style="border: 1px solid #ccc; height: 100px; width: 100%;"></div>	

### Users

One of the first things to do is to set up your **Users** and their passwords. Each user is assigned a **User Access** level, this feature complies with HIPAA guidelines.

**User Access Level chart**

	Home (tab)	All Patients (tab)	All Patients (+)	Patient Info (tab)	Visit (view)	Visit (data entry)	Visit (lock)	Advanced Printing	Consultation (view)	Consultation (data entry)	Consultation (lock)	Supplement Schedule	Administration (tab)
Administrator	*	*	*	*	*	*	*	*	*	*	*	*	*
Practitioner	*	*	*	*	*	*	*	*	*	*	*	*	
Clinical Assistant	*	*	*	*	*	*	*	*	*	*	*	*	
Clerk	*	*	*	*	*			*	*			*	

### Adding and editing Users

To add or edit **Users** select **Administration > Users**

The screenshot displays the software's navigation menu with 'Administration' selected. A dropdown menu is visible, listing various options such as 'Body Scans', 'Data Phrases', and 'Users'. A white arrow points to the 'Users' option. The background shows a patient record for 'Carol Sample' with visit details and a list of notes under 'Subjective' and 'Data'.

### Users Table

The **Users Table** lists current **Users** along with their **Access** level. It provides a means to create, edit, de-activate and delete users.

The screenshot shows the 'Users Table' interface. At the top, there is a 'New User' button with a callout 'To create a new user'. Below this are navigation buttons: '<<', '<', 'Page: 1', '>', and '>>'. The table has columns: 'Active?' (with a 'Yes' link), 'Last Name', 'First Name', and 'Access'. Each row has 'Modify' and 'Remove' links. A callout 'To modify user's name or password' points to the 'Modify' link. At the bottom, there is another 'New User' button and a callout 'To deactivate a user' pointing to the 'Active?' column. A final callout 'To remove a user' points to the 'Remove' link. The page status is 'Viewing page 1 of 1'.

### User Information page

**Users** are added by filling in the blanks. Click **Save** before returning to **Users Table**

The screenshot shows the 'User Information for New User' page. It features a 'Users Table' button at the top, followed by '<' and '>' navigation buttons, and a 'New Record' button. A 'Save' button is highlighted with a callout 'Click to save changes'. Below are input fields for 'First Name', 'Last Name', and 'Password'. An 'Access' dropdown menu is open, showing options: Administrator, Practitioner, Clinical Assistant, Clerk, and Guest. A callout 'Drop down to set user Access level' points to this menu. A 'Users Table' button is visible at the bottom.



## **Acknowledgements**

*Holistic Notes* was over four years in development. It's elegant, easy to learn - easy to use, interface is the result of a lot of behind the scenes work to turn complexities into simplicities. What began as an idea to produce a professional looking patient take home Supplement Schedule grew to a web based program, with HIPAA certified servers, government grade backups and security, military/bank grade encryption, website support, video and written support materials.

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### **Acknowledgements and Resources for Advanced Study**

For advanced study I recommend that you consult the very same resources that I found so very helpful.

- Standard Process, Inc. [www.standardprocess.com](http://www.standardprocess.com)
- MediHerb, Inc. [www.mediherb.com](http://www.mediherb.com)
- The International Foundation for Nutrition and Health [www.ifnh.org](http://www.ifnh.org)
- Ulan Nutritional Systems, Inc. [www.unsinc.info](http://www.unsinc.info)
- Dr. Stewart White seminars [www.doctorofthefuture.org](http://www.doctorofthefuture.org)

### **To you the User**

Thank you for your interest in *Holistic Notes*, we hope that *Holistic Notes* will be will be a valuable aide in your work helping people live better though natural means. Working together we can make a better world.

Please feel free to send your comments and suggestions to make this the best *Holistic Notes* program possible.

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