

Lifelong PHR™ (Personal Health Record)

Quick Start Guide

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Introduction

What is a Personal Health Record (PHR)?

A PHR is created and maintained by a responsible person to organize and consolidate their medical history. These records facilitate health management by aiding patients, along with medical professionals and others, to make informed decisions about their care.

How and why do PHRs differ?

PHRs differ depending upon the information that is included and how it will be collected, organized, entered, used and maintained. Their designs are influenced by the various individuals and organizations that provide PHR products and services. Ostensibly, they all may be called PHRs, but there are important differences.

What are the important differences between PHRs?

Differences reflect cost, delivery and content. Some PHRs are free with the exception of entering and updating the data. Delivery differs between traditional software products and SaaS (Software as a Service) delivered over the Internet. Content typically shares certain basic elements, but varies in other, in our opinion, important areas. Some are supported by advertising.

What is wrong with “free?”

All things being equal, nothing. In fact, we encourage organizations to buy our products and give them away to their members, employees and customers as a free public service with no strings attached. Others collect information on a website and agree to hold data in confidence, but there is always that element of concern. What if their PHR business is sold to another company, a rogue employee steals your data or you decide to change to a different provider. How easy will it be to transfer what you have already created to something different?

Why not collect papers in a shoebox and make entries in a spreadsheet or create your own database?

Leaving information in a disorganized state will expose it to a greater chance of loss, and the information will not be ready for use when it is needed. Furthermore, not everyone has the time to set up their own information capture, storage and retrieval system. So a more important question might be, “Why create a PHR now?”

Why create a PHR now?

The sooner a person starts their PHR, the better. A PHR is a perfect baby gift especially if it includes the commitment of parents to keep it up-to-date. For everyone else, even a partial record is better than nothing. If paper records are lost in a home, doctor’s office or hospital that is destroyed in a fire, storm or flood, having your own electronic PHR, that reflects your needs, is backed up remotely and is carried on a key chain, can be a lifesaver. Start now. Make it a family or community project.

About Lifelong PHR™ from IDMS

How did it come about?

After seeing people on television who lost all their personal records, the founders of IDentoMetric Solutions, L.L.C. decided that they needed to start collecting and organizing their own information. With growing concern over healthcare, having a Personal Health Record (PHR) turned into a top information priority. Research was conducted to determine products already on the market that would help. Not being satisfied with what we found, we decided to create our own solution and after a few iterations, decided to make it available to others.

More recently, we realized that providers do not keep their patients' records forever. Churn in the industry has aggravated this situation. Patients must, therefore, protect themselves by keeping copies of selected information that is generated on their behalf. This will assure that information is available in case a disease recurs or they have an emergency and their healthcare record is needed. Patients are likely to find that they are the only ones with certain information that others need to make informed decisions about their care and treatment. For example, providers need to know about Over-the-Counter medications, including vitamins, taken on a regular basis. Patients are responsible for keeping track of them and keeping doctors informed.

What does Lifelong PHR involve?

- Lifelong PHR is a software product from IDMS that can be downloaded from the Internet or is distributed on standard computer media.
- It is designed to be easy-to-use, highly intuitive, requiring little or no assistance, setup and training.
- It operates on PCs running Microsoft Windows® including Windows XP, Windows Vista and Windows 7 in both 32-bit and 64-bit versions.
- The current product enables users to store data and print standard reports. Information stored in the database includes:
 - General Information – Personal description and contact information
 - Health Care Providers – Including pharmacies and labs
 - Medications – Taken or taken recently, including prescriptions and Over-The-Counter medications and vitamins
 - Procedures – Including tests and treatments
 - Allergies and Illnesses
 - Immunizations, and inoculations
 - Vital signs – Height, weight, blood pressure, pulse, temperature, glucose, cholesterol
 - Encounters – Appointments and tests
 - Insurance
 - Family History
- Reports are generated in PDF format using an included runtime version of Crystal Reports. Aside from printability, they can be easily attached to emails and carried on small flash memory devices and smartphones.

Installing Lifelong PHR™

Please note: If a previous version of the software is installed, it is recommended to:

Backup existing Lifelong PHR data (phr.sdf) before uninstalling the program.

Uninstall Lifelong PHR software by using Add/Remove Programs in the Windows Control Panel. Program is identified by either “LifelongPHR” or “IdentoMetric Solutions,” depending upon the version of the product.

OBTAINING THE SOFTWARE

The easiest and fastest way to obtain the software is from www.LifelongPHR.com (Evaluate & Purchase) via a wideband Internet connection. Time required to download and install the program is approximately 10 minutes. However, should the program find that your machine needs software components that it does not already have, this will take additional time. You may want to disable security software (anti-virus and firewalls) and close other programs.

You will receive an email with instructions and need to respond to occasional prompts during the installation process.

USERS OF MICROSOFT® VISTA® AND WINDOWS® 7 ALSO PLEASE NOTE

During installation of your Lifelong PHR software, stronger security features in Microsoft Vista and Windows 7 operating systems will likely generate warnings about attempts to change software on your machine. Installation will not proceed until you agree to making changes. This is perfectly normal. Simply agree and continue with the installation.

File Location

During installation, you will be given the option to change the default location for the software installation. Otherwise, the default is:

C:\Program Files\Identometric Solutions LLC\Lifelong PHR\ (for 32-bit)

C:\Program Files (x86)\Identometric Solutions LLC\Lifelong PHR\ (for 64-bit)

Should you change the default, please be sure to keep a record of your new Path. You will need it to find files that may be required later.

AFTER INSTALLATION FINISHES

Go to your Windows Desktop. Look for the shortcut icon for the IDMS PHR program. It looks like this



If you do not find it, go to the File Location shown above. Right-Click on the same icon. Then select Create Shortcut. Minimize the Window, if necessary, and drag-and-drop the new shortcut onto the Desktop.

Alternately, you can go to START and All Programs and then "Lifelong Personal Health Records." You will see, "Lifelong PHR." Right click on it and Create Shortcut. This can also be dragged and dropped onto the Desktop.

Starting, Using and Exiting Lifelong PHR™

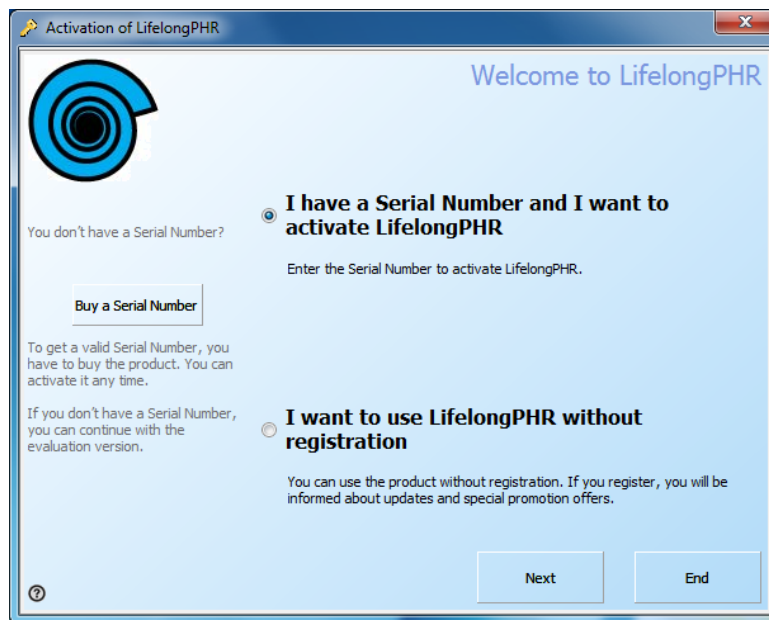
LAUNCHING THE LIFELONG PHR APPLICATION

1. From the Windows Desktop, start the application by double-clicking the following icon.



Or go to START, All Programs and Lifelong Personal Health Records. Click on Lifelong PHR. PLEASE NOTE: DOING THIS FOR THE FIRST TIME FINISHES CONFIGURATING THE PROGRAM FOR USE. CLOSE ANY MESSAGE GENERATED AND RESTART THE PROGRAM.

Someone who has not licensed the software can evaluate it. If you enter license key, you only see this screen once. Otherwise, it appears each time you evaluate the program. Make your selection and click NEXT.



2. There is no limit to the number of times this can be done. When you have a license key, simply restart the program and enter your license key to unlock the full capabilities of the program.

3. After you have entered a license key you can activate your software by using our on-line authentication server. Please check to make sure that you have an Internet connection. Otherwise, you will receive instructions to activate your license via email.
4. Enter or copy and paste your key into the form. **Highlighted fields are mandatory.** If you do not have a company name, duplicate your name. Also, please include your email address and a backup phone number so we can contact you about product updates.
5. When asked for the Login and Password, enter the same login (user name) and password that Windows requires to start your machine. If you do not use a machine password, leave the password field blank. If you do not know your Windows User Name, go to the START button in the lower left corner of your Windows desktop.

ENTERING DATA

1. *You will begin entering data into Lifelong PHR on its General Information Screen. To create a new record, click the “NEW” button and agree to enter a new record. You will be asked to enter First, Middle and Last names. Use an initial if desired.*
2. Then proceed to select Sex and enter Date of Birth. Click on the YEAR that is displayed in the date and change it to the one desired. Then go to the drop down calendar and move to the desired month and click on the day. Age will be calculated automatically when you proceed to another field.
3. At this point, saving is recommended. Use SAVE button at bottom of the form or click on a different TAB and the program will auto-SAVE.
4. Double-click on ADDRESS fields to display a mini-form. Click OK and move to another field after entering an address.
5. For phone numbers, either enter number as 999-999-9999 or (999) 999-9999. Whatever you enter will be reformatted as the latter. DO NOT ENTER ANY OTHER INFORMATION, E.G., COUNTRY, IN THE FORM.
6. Users interested in loading a picture will need a suitable image file. The program requires a JPG file that is no larger than 8 kb. Anything larger will generate an error message. For any amateur photographers with Adobe Photoshop, crop a picture and

adjust the resolution and size of your image using “File – Save for Web & Devices” and the JPEG setting. We created a 150 pixel by 150 pixel image using “JPEG Low” that was 1.672 kb in size.

7. TIPS FOR USING THE PROGRAM

1. Don't expect to accomplish too much at any one time. Decide what is most important to have in your record. Enter a few things, save them and come back later to do more.
2. Save regularly. After saving, make sure that the appropriate NAME is displayed at the top of the form before proceeding.
3. Note the order of the tabs. You will start with General Information on the left. Next it is best to add Health Care Providers. Otherwise, drop down boxes will not be populated on subsequent screens to the right. Note: Please be sure to indicate pharmacies and primary care physicians.
4. Should you skip any tabs as you move to the right, you may encounter an incomplete drop-down box. Simply tab back to the left and enter missing information where appropriate and then return to the desired tab.
5. Phone Numbers – Put them in any way you want to. When you move to another field, a format box will appear. **Leave country blank and simply click OK.**
6. Addresses – Double click to display an address format box. When completed, click OK and move to another field.
7. Social Security Numbers – If you choose to enter one, it must only contain 10 numerical characters (no dashes). Data will be masked and not appear in reports.
8. To sort data in any of the lists, click the heading of the column to be sorted.
9. To delete a complete patient record, click on File in the menu and select, “Delete Patient.”
10. To delete a line of data in a table, highlight the data, making it turn blue, and press the “delete key” on the keyboard.
- 11. Please be sure to SAVE before exiting or creating reports. Either use the Save button at the bottom of the page or auto-SAVE by moving to a different TAB.**
- 12. Also, refer to white paper, “Personal Health Records Satisfy Many Needs,” for things to consider and include when planning your record. (See "News & Views" on our website.)**

Creating Reports

Reports are generated using SAP's Crystal Reports Runtime software. The **Reports** option is located along the Lifelong PHR menu bar between **File** and **Help**. There are two standard report formats.

- Emergency Information Card
- Medical Summary Report

Reports are generated in the PDF file format. Reports can be printed, shared electronically, e.g., as an email attachment, or saved on a flash memory device or Smartphone where it will be available in times of emergency.

PLEASE NOTE: If you encounter difficulties running reports, you may need to download a free program from the Microsoft website. Click on: [Microsoft .NET Framework 4 \(Web Installer\)](#) or enter the following address into your browser.

<http://www.microsoft.com/downloads/en/details.aspx?FamilyID=9cfb2d51-5ff4-4491-b0e5-b386f32c0992>

Backing Up Your Data

This is very important. Start by finding the Microsoft SQL Server Compact Edition Database File (SDF) that stores your data. It is to be found in the same location where your program is installed. If you changed it from the default during the installation of the program, use that path. Otherwise, the default is:

C:\Program Files\Identometric Solutions LLC\Lifelong PHR\ (for 32-bit systems)

C:\Program Files (x86)\Identometric Solutions LLC\Lifelong PHR (for 64-bit systems)

Look for the database file named, "PHR" (Type: SQL Server Compact Edition Database File)

Suggestion: Make a copy of this file on a flash drive or other media and store it in a safe place, preferably physically separated from the original. Also consider carrying a copy for emergency use. It can be on a flash drive attached to a key chain and also include PDF reports created from the "Reports" option. This is located on the blue menu bar at the top left corner under Personal Health Records.

We recommend encryption to improve the security of data.

Getting Help and Providing Feedback

We wish you good health and will do our best to help you to use Lifelong PHR to further it. We believe that you will find Lifelong PHR to have growing importance in contributing to the successful and active management of your health care.

Your suggestions will help us to make the product continually better for you. We take each suggestion very seriously and have our own list of planned enhancements.

At this time, there are currently three communications channels for our customers.

1. Contact your source for the product.
2. Send email to Support@LifelongPHR.com
3. Refer to www.Lifelong.com. Sign up for our eNewsletter. You will also find links to papers that we believe will help you make important decisions regarding the information to collect and store in your database and ways to receive maximum value from it.

IDentoMetric Solutions, L.L.C.

www.IDentoMetricSolutions.com

www.LifelongPHR.com