


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- 1 Overview of CHIPwit with function descriptions and overall system design** [2](#)
 - A CHIPwit uses an Excel workbook template with specially-designed worksheets and macros to automate administration of the CHIP intensive lifestyle education program.
 - B The following administrative functions are automated:
 - 1 participant recruitment (Information sessions),
 - 2 before and after risk factor assessment and feedback (heartscreen #1 and #2),
 - 3 storage and transmission of participant data to a central database (CHIP Asst),
 - 4 summation of results for presentation (CHIPwit Powerpoint),
 - 5 and recording and printing follow-up measures.
 -  C The CHIPwit template automatically updates the Summary workbook and the presentation Powerpoint with information about each participant for each session.

 - 2 Starting a new Chapter** [3](#)
 - A The CHIPwit software is distributed ready to use. Copy it to a file folder where you will keep all the workbooks for the new chapter before opening it. (e.g. C:\My Documents\Anycity CHIP) The first thing CHIPwit does is request the

authorization code and update itself by saving the file so it will not ask again. Each new CHIP session done by the chapter saves a separate copy of the workbook so the CHIPwitMASTER 'chapter copy' remains unchanged.

- B More new chapters can only be started with the software copy distributed. Once the authorization code is entered and a new chapter is registered, the program cannot be used to register another chapter. (contact the distributor for further instructions)

3 Starting a new Session

[4](#)

- A New CHIP sessions can only be registered after the new chapter is registered. (see section #2 above) CHIP sessions can only be started (registered) using the CHIPwitMASTER workbook saved after the proper Authorization Code is entered.
- B Each new CHIP session conducted by the chapter generates a separate copy of the workbook with a unique filename identifying the session (e.g. 'CHIP#1') which can be personalized. (e.g. 'CHIP#1, Sometown Oct-09')
- C Hundreds of sessions can be registered by a single chapter, so there is essentially no limit to the number of sessions.
- D A new session is registered every time a CHIP program is conducted. The 'Session' workbook form is used to provide relevant information. (see the 'Session' tab)
- E All of the information is required for proper processing of the session. Fees and heart-screen appointment data is required before the blank Registration form can be printed.
- F Data from previous Session workbooks may be imported into the workbook using the '**Import Session Info**' button on the 'Session' workbook form. This function allows the following data to be imported from CHIPwit workbooks:
 - 1 City-State Shortcuts
 - 2 Heartscreen Stations
 - 3 General Session information (address, configuration)
 - 4 Fees

4 Preparing for Information sessions

[5](#)

- A New participants are typically enrolled in the CHIP program (session) at the close of an Information session. This is done using a Registration form blank.
- Pix** B A blank Registration form master is printed for each new CHIP session to be used during the Information sessions to register participants. Those who wish to enroll fill out a Registration form with their name, status and fee, and some other information.
- C The completed forms are entered into the workbook to enroll participants at the close of the Info sessions.

5 Adding a new Participant (Enrollment)

[6](#)

- A The completed Registration form is used at the close of the Information session to enroll (add) new participants into the workbook for the new session. (The session workbook should be open before proceeding.)
- B From the 'TaskList' tab 'A' panel, click the '2. Add Participant' button to add a new participant. (To add another participant from participant worksheets (e.g. 01, 02, etc.), use the 'Enroll Next' button.)
- C Enter information from the completed Registration form into the workbook form. (workbook forms look like the paper forms) Information from the paper form can be

typed directly into the worksheet form, or the 'Register' button can be used to display a dataform used to enter the information. Either method can be used interchangeably.

D A heartscreen appointment time slot is selected by the enrollee and entered on the into the worksheet form.

Pix E When all information is entered, the heartscreen #1 lifestyle assessment form is printed and given to the participant to complete and bring to the heartscreen. This form contains participant name and appointment. Everything is on the one paper form.

F The form is given to the participant and they are instructed to fill it out and bring it to the heartscreen at the appointed time. It includes a box for them to write down all of their medications.

6 Preparing for Heartscreen #1

[7](#)

A Heartscreen #1 is conducted to measure beginning risk factors. This is done using a series of stations where various biometric measures are taken and reviewed.

B Participants are scheduled to arrive in blocks of n every 15 minutes at a rate intended to match the rate at which measures can be taken. Usually the blood draw station is the rate-limiting step. (the one that takes the longest) The number of participants to schedule in every 15-minute block is specified on the 'Session' worksheet form.

C The list of stations and the measures taken at each is specified on the 'Session' worksheet form and printed using the '**Print Heartscreen Station Posters**' button.

The list can be revised to reflect whatever arrangement best suits the team. (The default list can be restored using the '**Reset Station Default Tasks**' button.)

Pix D The printed posters contain a large digit and the task list to identify the various stations and guide traffic during the heartscreen event.

Pix E A page is printed along with the posters listing the heartscreen stations with blank lines to write in the name of the responsible person for each station. This list is used by the team and the person supervising the event.

7 Entering data during and after Heartscreen #1

[8](#)

A Participants must bring the completed heartscreen assessment form received at the Information session. If they forgot the form, another copy is printed and given to them to complete before they can register for heartscreen #1.

B The assessment form includes a box for recording measures during heartscreen. The form is put on a clipboard and carried from station to station by the participant. Each station takes the measures and writes them in the proper place on the form.

C A good time for the form to be entered into the workbook is during the blood draw. All data should be entered before the medication review station where it must be reviewed.

D Heartscreen data is entered by clicking on the workbook tab for each participant and either typing directly into the form or using the '**Screen#1**' button to display a dataform.

E Vitals and labs are entered by typing directly into the workbook form or by using the '**Vitals/Lab2**' button to display a dataform. (vitals can be entered without entering labs)

F The medication review includes a review of the medications and choosing two primary goals for the program. It also includes distribution and explanation of the JumpStart booklet.

G Everything but labs should be collected and entered into the workbook during the heartscreen event. The labs are typically received a few days after the blood draw.

If they are available in electronic form, they can be imported into the 'Labs' workbook form as a text or spreadsheet file and then parsed into the lab table with cell formulas.

- H If the labs are only available in paper form, they may be entered into the lab table in the 'Labs' workbook form, or entered directly into the worksheet forms for each individual.
- I Lab values entered directly into the worksheet form take precedence over values entered into the lab table in the 'Labs' workbook form.
- J After all data is entered into the workbook for all participants, you are ready to proceed to the next step -- the lifestyle evaluations.

8 Using the Labs form to import and parse electronic lab reports

[9](#)

- A Lab values are often reported using hardcopy printouts. This is fine for a document to provide for the participant or their doctor, but it is inefficient to type lab values from the hardcopy into the workbook for each participant.
- B CHIPwit provides for importing electronic lab reports into the workbook with automatic parsing to separate the file into meaningful data for the labs to eliminate manual data entry. Once this process is established, it is automatically repeated for all subsequent CHIP sessions using the same laboratory.
- C First, download the electronic file to a folder on your computer. This file can be deleted later. Open the active CHIPwit Session and, from within Excel, open the file with labs. Pix Select the proper file type (text or Excel, etc.) and then select the filename. (see pix) When opening a text file, delimiters must be specified to properly parse data. (see pix)
- D After the file is open it is moved to the end of the CHIPwit workbook using the 'Edit-> Move or Copy Sheet...' function and selecting the CHIPwit workbook. (see pix) Pix
- E Once the file is moved into the workbook, the worksheet name must be typed into the 'Labs' worksheet form to activate the automatic parsing process. The worksheet form contains two **green-shaded** boxes at the top, one for heartscreens#1 and one for heartscreens#2. The names of the electronic/digital files imported are entered in these boxes. Once that is done the parsed lab values should appear in the cells below the yellow headings, and in the appropriate workbook heartscreens forms. Pix
- F If the lab values do NOT appear, something went wrong during the importing process. The wrong file may have been opened or improper delimiting was selected, etc. It may be the file format is not one CHIPwit can handle. If that is the case you will need to contact the CHIPwit HelpTeam for assistance.
- G The lab values can be entered into the cells manually, or even into the individual participant worksheet forms. This is not intended to be the usual method but is provided for backup and when late labs are received separated from the electronic file already imported. (CHIPwit cannot handle more than one file for each lab report)

9 Preparing and printing Lifestyle Evaluation #1

[10](#)

- A From the 'TaskList' tab 'B' panel, click the '**4. Prepare Evals**' button to hide the heartscreen forms and display the lifestyle #1 evaluations forms. Then tab to each participant's worksheet form (e.g. '01', '02') to review the evaluation and make any revisions.
- B The evaluation feedback is provided automatically using Excel formulas. Any of these annotations can be altered by typing over them. Red ovals can be added by selecting the cell to flag and using the '**PasteRectangle**' macro. (Ctrl-Shift-X keyboard shortcut)

- C Individualized comments can be entered beneath each of the two primary goals selected by the participant. There are macros to paste template text, '**EatHealthy**', '**LoseWgt**', '**LowerBP**', '**ReduceChol**' etc. The keyboard shortcuts are:
 - 1 '**EatHealthy**' - Ctrl-Shift-E (all keyboard shortcuts include Ctrl-Shift)
 - 2 '**LoseWgt**' - Ctrl-Shift-W
 - 3 '**LowerBP**' - Ctrl-Shift-B
 - 4 '**ReduceChol**' - Ctrl-Shift-C
- D After all revisions are made for participants not dropped, you are ready to print the evaluation forms for distribution. From the 'TaskList' tab '**B**' panel, click the '**5. Print Evals**' button to print the completed lifestyle evaluation forms. Be sure to specify the appropriate printer in the Print Preview box. If the forms are to be emailed or posted to a web page, they should be converted to a suitable format such as the Adobe PDF file. (This can be done using any file conversion program such as 'PDF Creator'.)
- E Two copies are printed for each participant, one for the participant and one for their physician. Extra copies of the forms can be printed by selecting the workbook tab (e.g. '01', '02') and using the Excel Print function.

10 Preparing for Heartscreen #2

[11](#)

- A After the lifestyle evaluations are distributed and before the second heartscreen event, the heartscreen assessment forms need to be printed and distributed to the participants. From the 'TaskList' tab '**C**' panel, click on the '**6. Print HS#2**' button to hide the lifestyle evaluation forms, and display and print the heartscreen #2 forms.
- B These forms include the participant's name and appointment and medical conditions from heartscreen #1. The dietary, rest & stress, exercise and medication fields are blank and ready to be filled in.
- C The forms must be completed by the participant and brought in for heartscreen #2. As before, if the completed form is not brought, another copy is printed from the workbook and completed at Registration before proceeding to the heartscreen stations.

11 Entering data during and after Heartscreen #2

[12](#)

- A The process is a repeat of step #7 with heartscreen #1. The assessment forms include information from heartscreen #1 such as disease conditions, smoking, goals and medications. Information that does not change need not be entered again.
- B Heartscreen data is entered by clicking on the workbook tab for each participant and either typing directly into the form or using the '**Screen#2**' button to display a dataform. Some fields are included that are not present on heartscreen #1, such as Table#.
- C Medication dosing from heartscreen #1 is shown with a column for current dosing to be filled in. Dosing can be entered as 'same' if there are no changes, or as 'none' or '0' if the medication has been stopped. New medications can be added below the list of medications from heartscreen #1. (It is important to record all medication dosing accurately and completely.)
- D The labs are entered as for heartscreen #1, preferably by importing them electronically. Similar cell formulas can be used to format the labs in the 'Labs' worksheet lab table.
- E Miles walked are entered into the 'Participants' worksheet by typing directly into the form or using the '**Enter Miles**' button with a dataform. Miles are tallied from the Table

attendance / exercise records.

- F After all data is entered into the workbook forms, you are ready to prepare evaluations.

12 Preparing and printing Lifestyle Evaluation #2

[13](#)

- A The process is the same as for lifestyle evaluation #1 in step #8 above.
- B From the 'TaskList' tab 'C' panel, click the '**8. Prepare Evals**' button to hide the heartscreens and display the lifestyle #2 evaluations forms. Tab to each participant's worksheet form (e.g. '01', '02') to review the evaluation and make any revisions.
- C A WordArt textbox can be added by selecting the cell row and using the '**PasteComment**' macro. (Ctrl-Shift-Z keyboard shortcut) The default text is 'Good work!' and the text can be changed using a dialog box.
- D (see items #8.B-E above) From the 'TaskList' tab 'C' panel, click the '**9. Print Evals**' button to print the lifestyle evaluations, including a page with comparison data.

13 Preparing for the "results" event (graduation)

[14](#)

- A In addition to the lifestyle evaluations from heartscreens #2, there are a number of other items that must be prepared for the Graduation event.
- B From the 'TaskList' tab 'D' panel, click the '**10. Group Summary**' button to prepare and print the group summary worksheet with graphics. This summary shows the averages for the Session. (weight change, blood pressure change, etc.) After this button is used the 'Group' and 'Charts' worksheets are visible and can be viewed.
- C From the 'TaskList' tab 'D' panel, click the '**11. Print Awards**' button to prepare and print the certificates of completion for each participant not flagged as 'dropped' and to prepare and print the Awards.
- D You will be asked whether to print certificates or not and may skip this step if it not needed. After the certificates are printed (or skipped) you will be asked whether to prepare and print the awards. You may skip this step if it is not needed.
- E The awards are assigned to participants based on changes in their risk factors shown in the 'Participants' worksheet. Individuals qualifying for multiple awards are only awarded their top performance and then others are assigned who do not have any awards. This may result in individuals getting an award who did not have the greatest improvement, and honorable mention is made of those with equal or greater improvements. These individuals are flagged with a single asterisk (*) in the Participants' worksheet. A separate award is made for men and for ladies for greatest miles walked. The ladies are flagged with plus signs (+).

- Pix** F Award assignments can be altered by making changes to the 'Participants' worksheet. The awardees and runner-ups are listed at the bottom of the worksheet. The ID#s may be changed and this will assign awards to the the ID# entered under each risk category shown. Awards that are not desired may be discarded or not printed.

14 Exporting and sending the CHIP Assistant data

[15](#)

- A The process is the same as for lifestyle evaluation #1 in step #8 above.
- B From the 'TaskList' tab 'C' panel, click the '**8. Prepare Evals**' button to hide the heartscreens and display the lifestyle #2 evaluations forms. Tab to each participant's worksheet form (e.g. '01', '02') to review the evaluation and make any revisions.
- C A WordArt textbox can be added by selecting the cell row and using the

'PasteComment' macro. (Ctrl-Shift-Z keyboard shortcut) The default text is

'Good work!' and the text can be changed using a dialog box.

- D (see items #8.B-E above) From the 'TaskList' tab 'C' panel, click the '**9. Print Evals**' button to print the lifestyle evaluations, including a page with comparison data.

15 Preparing for, entering and printing Follow-up measures

[16](#)

16 Using the CHIPwitSummary workbook

[17](#)

- A Data from CHIPwit workbooks is exported to the CHIPwit Summary workbook when the '**13. Export Data**' button in 'TaskList' panel 'E' is clicked. (A CHIPAsst file is also created for emailing to the central CHIP database) This function requires that you identify the Summary workbook to open and export the data into. (The Summary workbook contains a macro that can import data from CHIPwit workbooks, as well.)
- B The Summary workbook consists of four components:
- 1 A master list of all sessions contained in the workbook, with the date imported and descriptive information including session dates and name and size
 - 2 A set of worksheets with stratified data and charts for key risk factor measures (e.g. BMI, TChol)
 - 3 A worksheet containing all data imported from CHIPwit workbooks in the same format as the 'Data' worksheet in CHIPwit
 - 4 Macros to manage the workbook, including importing ('**ImportSession**') and deleting ('**DeleteLast**') sessions
- C The Summary workbook aggregates CHIP Sessions into a combined database to analyze data across multiple sessions. It is used to aggregate all sessions for the chapter. (It can also be used to aggregate multiple chapters for larger-scale analyses.)
- D An empty Summary workbook is distributed with CHIPwit and may be used to make as many copies as desired to aggregate data across different sessions and chapters. The original copy should be used only to make additional copies for use.

17 Using the CHIPwitPPT Template

[18](#)

- A Data from each CHIPwit session is exported to the CHIPwit PPT Template when the '**12. Export PPT**' button in 'TaskList' panel 'E' is clicked. This function automatically opens the 'CHIPwitTemplate.ppt' file and exports stratified summary data from the workbook into the template charts on the slides. It then saves the template with the name of the CHIP session (e.g. CHIP#1.ppt) in the same folder with the CHIPwit workbook. (The template is not altered but only used as an empty template.)
- B The PPT template and the PPT saved contain a macro ('**ImportCHIPwit**') that imports summary data from a CHIPwit workbook. Imported data overlays whatever data is already in the PPT. This function allows data exported from the CHIPwit workbook to be refreshed or revised as desired.
- C An empty PPT Template is distributed with CHIPwit and may be used to make as many as many copies as desired to aggregate data across different sessions and chapters. The original copy should be used only to make additional copies for use.

18 Helpful Hints and shortcuts

[19](#)