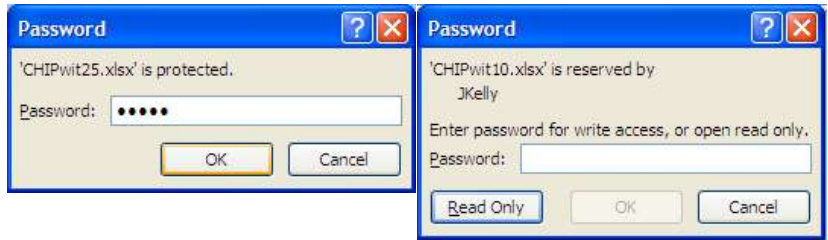


CHIPwit QuickStart: Getting going the first time (see UserGuide for details)

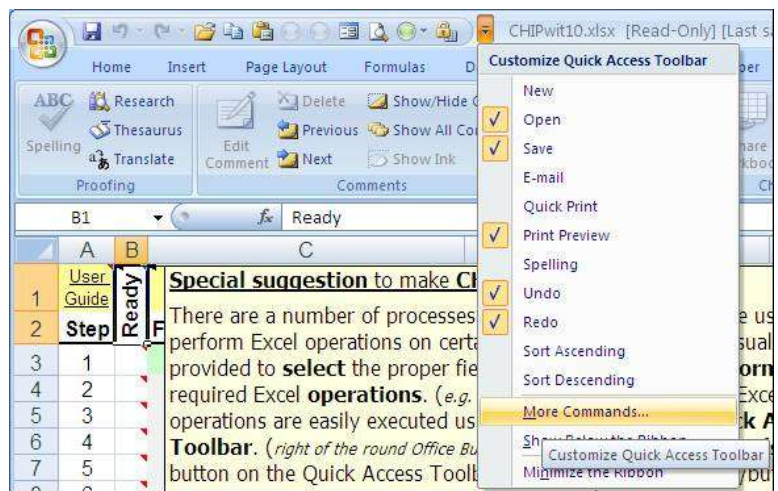
After transferring the CHIPwit files to a folder of your choice on the drive of your choice, usually one that will contain all **CHIPwit** files, follow this sequence to begin using it.

1. Open the downloaded workbook "CHIPwit25.xlsx" by entering the password. And then select the "Read Only" option button. (*do not enter a password for write access*)

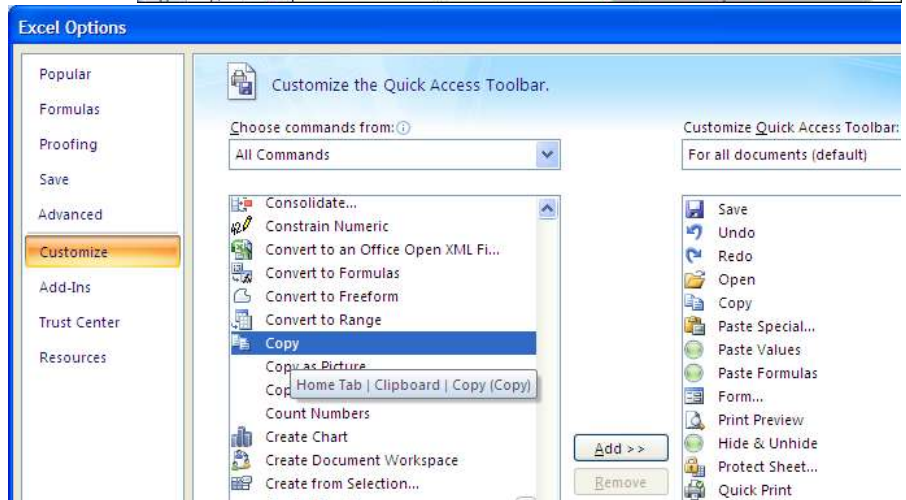


2. Read and follow the instructions in the comment box shown on the "Control" sheet. (adding the suggested icons to your Quick Access Toolbar makes it much easier to use **CHIPwit**)

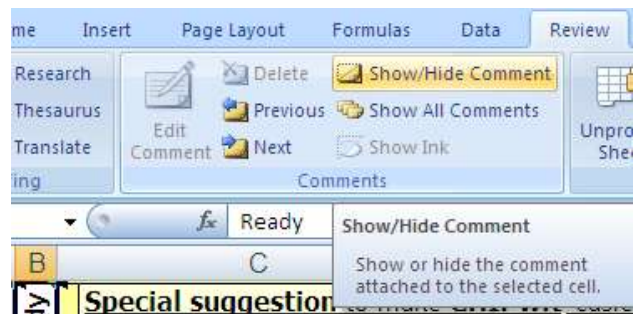
- a. Use 'More Commands' on the 'Modify Quick Access Toolbar' menu to add the following command icons to the toolbar.



- i. Copy
- ii. Paste Special
- iii. Paste Values
- iv. Paste Formulas
- v. Form (dataform)
- vi. Print Preview
- vii. Hide & Unhide
- viii. Protect Sheet

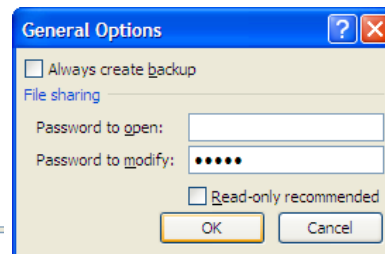
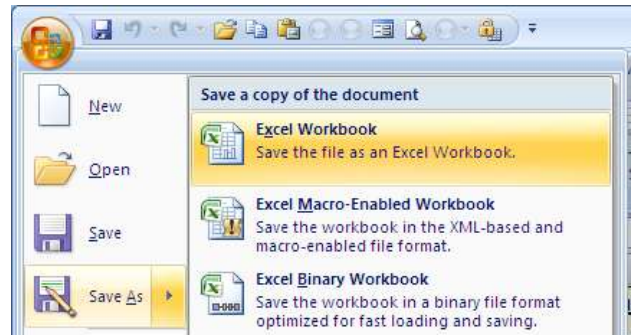
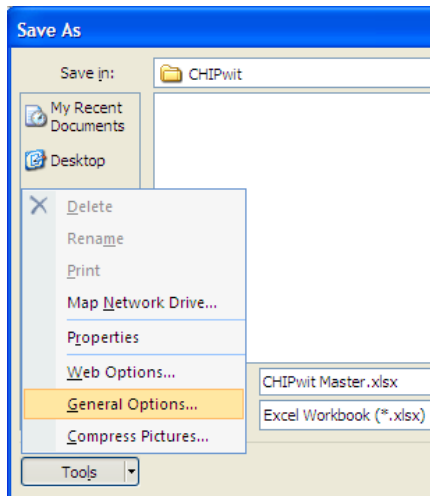


- b. Hide the comment box for cell 'B1' by selecting the cell and using the 'Show/Hide Comment' command in the 'Comments' section of the 'Review' tab, or using the right-click menu.



3. After hiding the comment box for cell 'B1', read the instructions in the remaining comment box, then select cell 'A1' and hide the comment box using the 'Show/Hide Comment' command in the 'Comments' section of the 'Review' tab, or using the right-click menu. Then save a copy of the file.

- a. Use 'Save As' (Office menu) to save a copy of the file as the "Chapter master copy" using a suitable file name. While saving, use the "Tools" button to set a password of your choice to modify the file. (e.g. "99999")



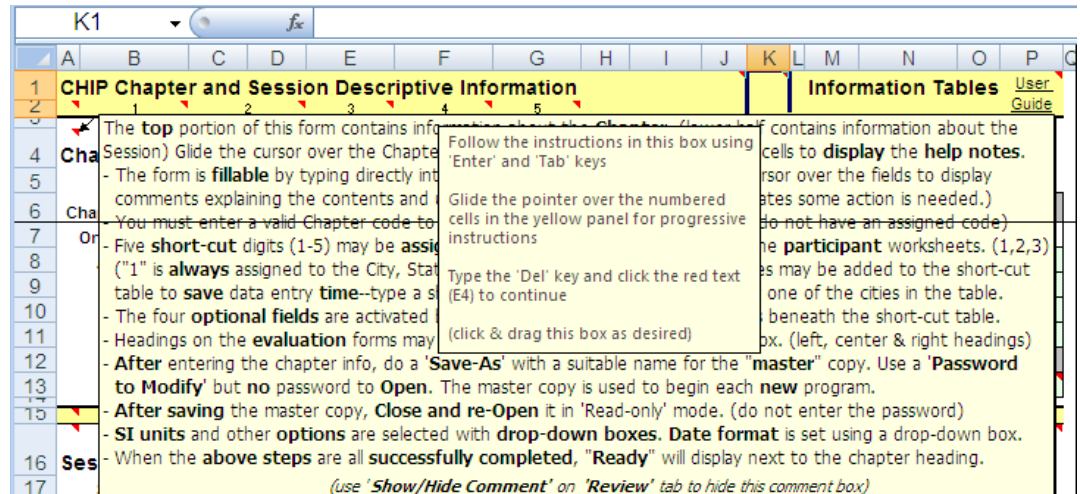
4. Click the "Register Chapter" link in the 'Control' sheet or select the 'Session' tab at the bottom of the workbook to tab to the 'Session' sheet.

	A	B	C	D	E
1	Help note	Ready	(glide pointer over cell A1 to view helpnote)		
2	Step	Ready	Function description		Participant
3	1		Register Chapter		
4	2		Register Session		
5	3		Register Participants		

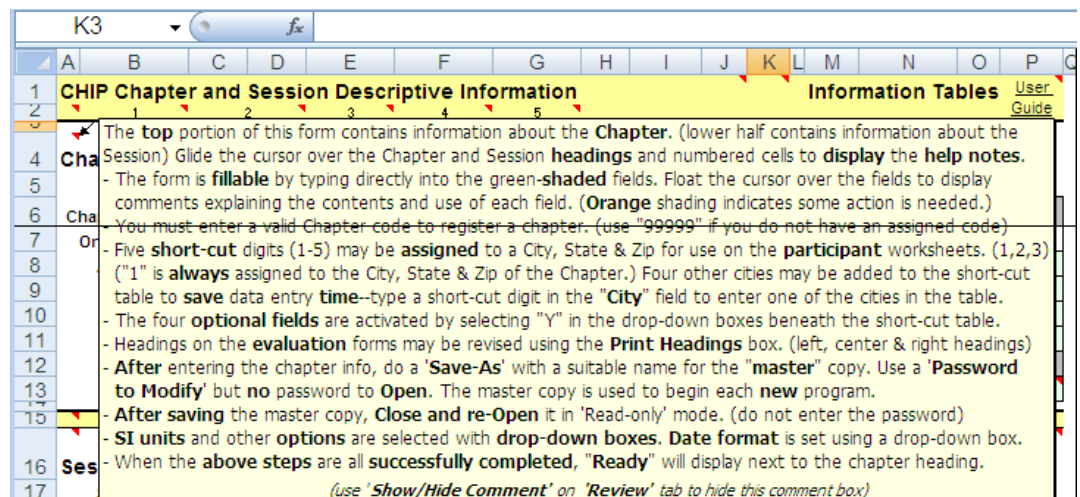
- a. Follow the prompted directions to enter information about the chapter. (top section) Then 'Save', 'Close' and re-'Open' the workbook before filling out the bottom section.

Code	City	State	Zip
1		0 0	0
2			
3			
4			
5			

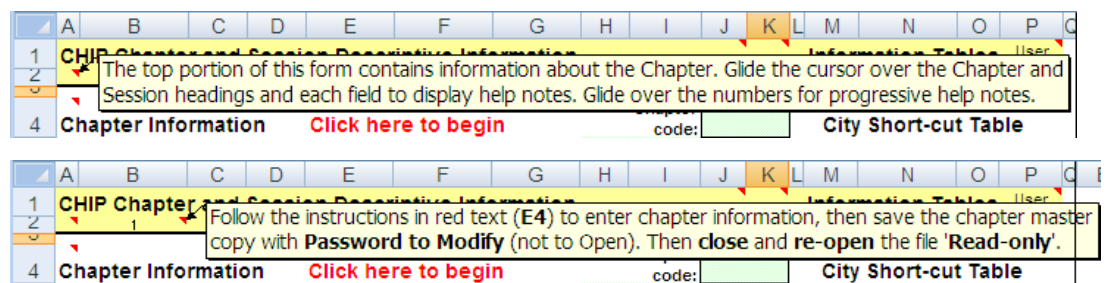
- b. Glide the pointer over the cells with hidden pop-up comments to understand key points about entering information and using the sheet. (Hidden comments may be viewed by gliding the pointer over the cell at any time.)



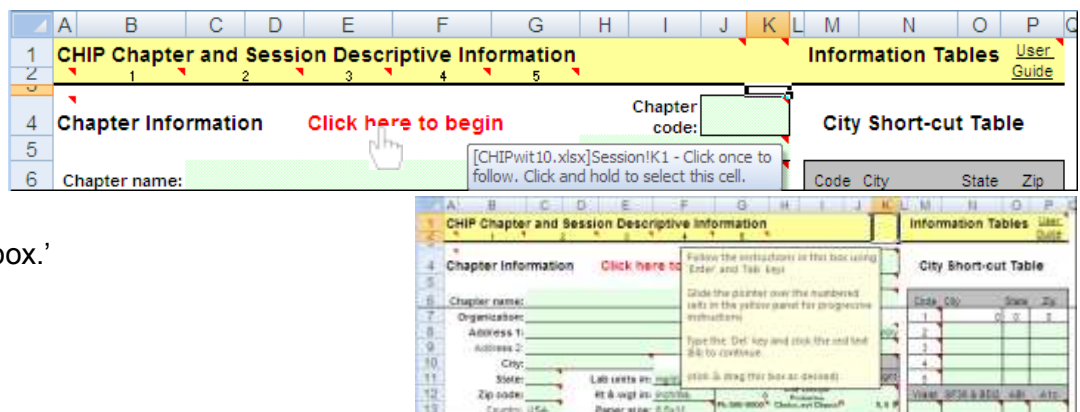
Move to a different cell to hide the 'Input box' shown on top of the pop-up box.



Gliding the pointer over other fields displays additional short help notes and instructions.



- c. Click the red "Click here to begin" text to begin entering chapter information. This will scroll to the cell containing the first of the step-by-step instructions in the 'Input box.'



- d. Follow the instructions, entering data and using the 'Enter' and 'Tab' keys after entering each field. Type the 'Del' key and click the red text to proceed. This will scroll to the chapter code and display the 'Input box' instructions for the field.

- e. Fill in the fields with green shading in accordance with the instructions in the 'Input box.' During this process the red text will say "Enter chapter info" and clicking it will scroll to the chapter fields to be entered.

- f. The use of optional measures is specified in the boxes just below the City Short-cut Table. Enter "Y" to activate any of the optional fields.

5. When sufficient information has been entered, the red text will read "Ready to Save chapter master with Read-only password". Clicking the text will scroll to the cell containing final instructions for saving the chapter copy and closing and re-opening it to enter session info.

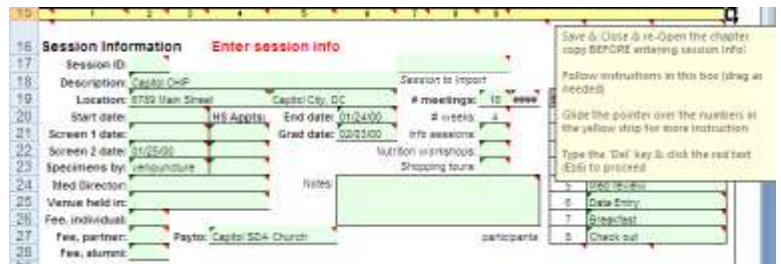
- a. Use 'Save' (diskette icon on Quick Access Toolbar) to save the updated Chapter master file. (If the file has not been saved as



described in #3.a above, the 'Save' will trigger that process in order to save the file.)

- b. Close and re-Open the file as 'Read-only' (do not enter a password) and continue entering the session information as described below. (This step is done to avoid unintentionally entering session information in the chapter master copy that is used to start future sessions. Any session information entered before saving and closing the chapter master copy that may not apply to future CHIP programs would have to be changed each time a new CHIP session is started.)

6. After opening the chapter master copy as 'Read-only', follow directions as shown in the 'Input box.' Type the 'Del' key and enter session information as described below, much as was done for the chapter above. Save a new copy of the workbook for the new CHIP session.



- a. Gliding the pointer over the cells displays helpnote boxes for the bottom section of the sheet.

The bottom portion of the form contains information about the **Session**. (Glide the pointer over the headings to display help notes.) See the **UserGuide** for more detailed instructions. (click **UserGuide**)

- Information is typed into the green-shaded fields on the form. Orange shading indicates that the information is not yet entered.
- Each CHIP program (Session) must be registered using the "master" copy that was created for the chapter above. The first step is to do a "Save-As" with a suitable name for the new session.
- Specify a password to open the file to protect its confidential contents, but do not use the same password as the chapter master copy.
- After all session info is entered into the lower half of the form, "Ready" will display next to the "Save" button.
- When this is done an individualized HeartScreen#1 form can be printed for each registered participant. Participants may alternatively be enrolled using blank paper Registration forms.
- The HeartScreen stations are described in the box just right of the "Notes" box. The stations are automatically numbered 1-8. The measures to be collected at each station may be changed. (leave any blank, unused stations at the bottom of the list) The "HSPosters" worksheet contains eight 1-page signs with station numbers and measures that may be printed using the Excel-Print function.
- The CHIP Calendar is shown on the far right of the bottom section of this form. Use the "Calendar" link to scroll to it to Show/Hide it. Dates are marked/unmarked on the Calendar by changing their contents from text to number and back. (Only dates between the first meeting and the last meeting--"Start date" & "End date"--can be marked.)
- Information may be imported from a previous 'Session' worksheet using the Session to Import field and the special links provided. (see the UserGuide for details)

(Use 'Show/Hide Comment' on 'Review' tab to hide this comment box)

The lower half contains information about the individual session. Glide the cursor over the Session heading and over each field to display help notes. Glide over the numbers to the right for progressive help notes.

Save & Close & re-Open the chapter copy BEFORE entering session info!

Follow instructions in this box (drag as needed)

Glide the pointer over the numbers in the yellow strip for more instruction

Type the 'Del' key & click the red text (E16) to proceed

- b. Clicking the red "Enter session info" text scrolls to the first field to be entered, 'Session ID'. Enter the number of CHIP programs conducted by the chapter and type 'Tab' or 'Enter' to proceed to other fields.

Unhide Calendar

Station Task List

Station	Tasks
1	Registration
2	Height, weight & wrist
3	BP & pulse
4	Blood draw

Save & re-open chapter Master BEFORE entering session data!

Enter number of CHIP programs conducted including this one

- c. When sufficient fields have been entered, the red text will read "Ready to Save session copy with 'Password to Open' (not to modify)". Not all information fields are required and much of it is "suggested" by the software. You can return to the 'Session' sheet any time to revise or update the information. (Fields **required** for Info sessions and blank forms includes the program start & end dates, HeartScreen #1 & #2 dates, HeartScreen appointment begin & end times, program fees, and "pay-to" information.) Clicking the text scrolls to cell 'J1' and gives the final instructions to type the 'Del' key, save the session file (with 'Password to Open' but NO password to modify) and proceed.

Ready to Save session copy with 'Password to Open' (not to modify)

Session Information

Session ID: 1

Description: Capitol CHIP 1

Location: 6789 Main Street, Capitol City, DC

Start date: 01/17/11, HS Appts: , End date: 02/10/11, # meetings: 16, # weeks: 4

Screen 1 date: 01/14/11, Grad date: 02/20/11, Info sessions: , Nutrition workshops: , Shopping tours: ,

Specimens by: venipuncture

Med Director: Dr. White

Venue held in: Other faith-based facility

Fee, individual: \$250

Fee, partner: \$125

Fee, alumni: \$100

Notes: Enter the fee charged for repeat alumni participants

Station Task List

Station	Tasks
1	Registration
2	Height, weight & wrist
3	BP & pulse
4	Blood draw
5	Med review
6	Data Entry
7	Breakfast
8	Check out

- d. Typing the 'Del' key removes the red text and displays "(finished)" signifying the session is registered.

CHIP Chapter and Session Descriptive Information

Chapter Information (finished)

Chapter name: Capitol CHIP

Address 1: PO Box 12345

Address 2: 6789 Main Street

City: Capitol City

State: DC

Zip code: 20201

Country: USA

Lab units in: mg/dL

Ht & wgt in: inch/lbs

Paper size: 8.5x11

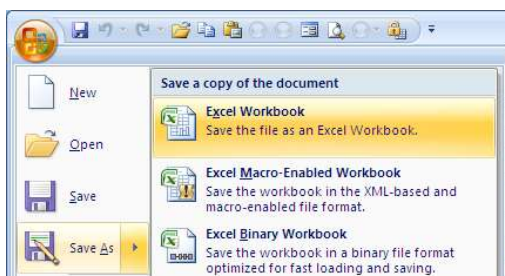
City Short-cut Table

Code	City	State	Zip
2			
3			
4			
5			

Session Information (finished)

Session ID: 1

- e. Use 'Save As' (Office button) to save a copy of the file for the new session. Give it an appropriate name (e.g. CHIP-4, Sep 2010) to identify the session. Do **not** make it a "Read only" file (no 'Password to Modify' since this file will be opened and updated many times during your CHIP program).

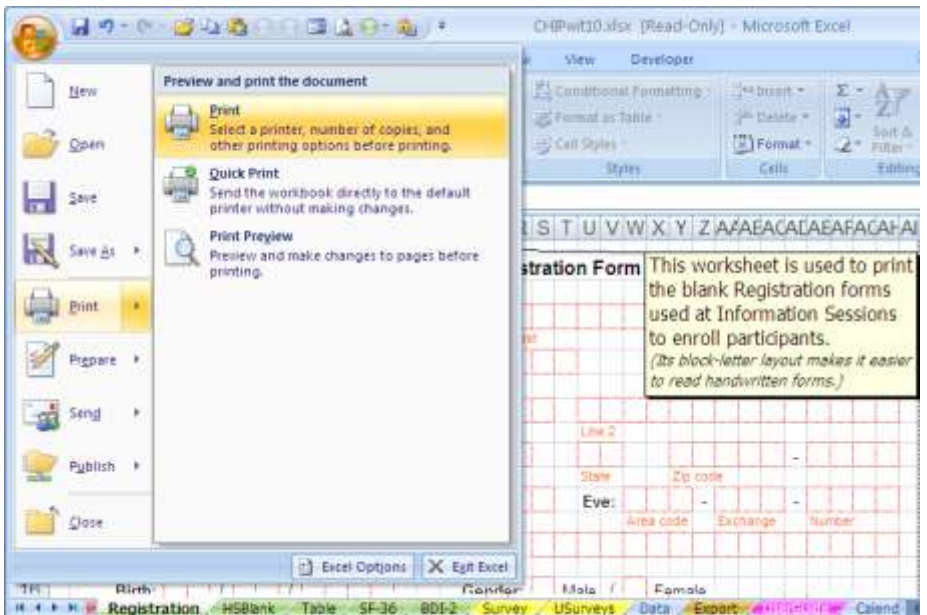


Use a 'Password to Open' the file in order to protect the confidential information it will contain.

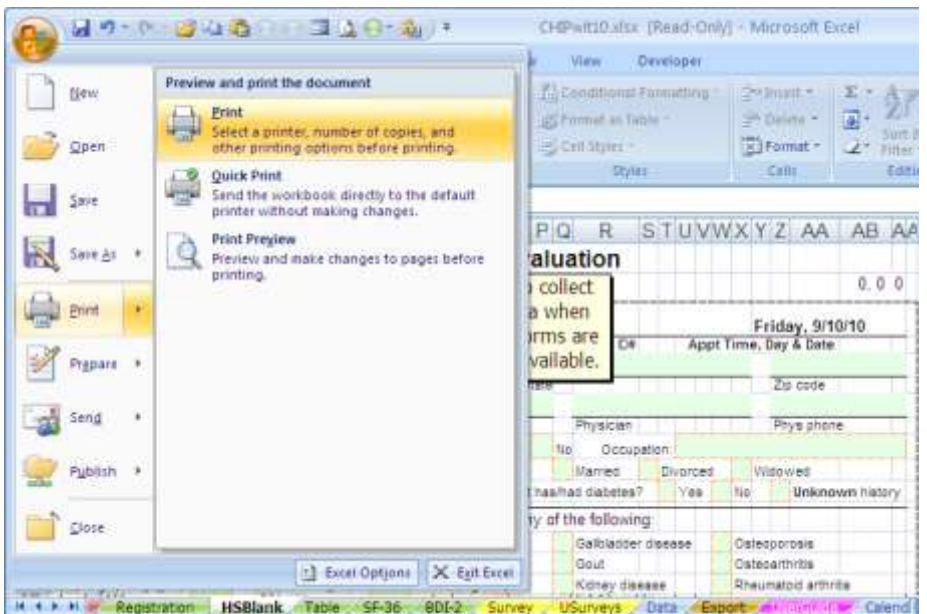


7. You are now ready to print the blank forms needed before HeartScreen #1, as described below. (Registration and HeartScreen #1 forms)

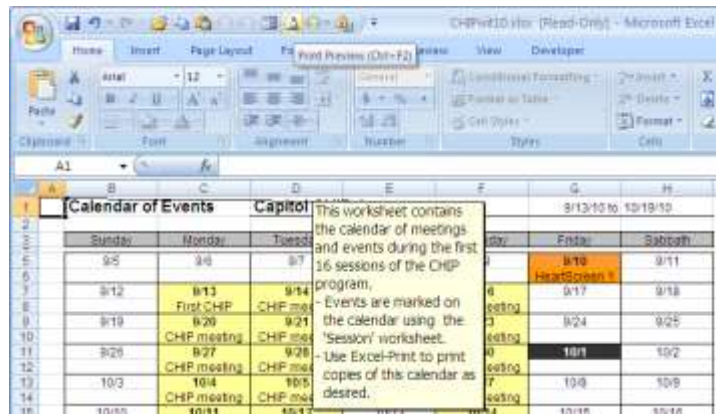
- a. Select the 'Registration' sheet. Use Excel Print (Office menu) to print a "master" to make copies from, or print as many copies as you wish.



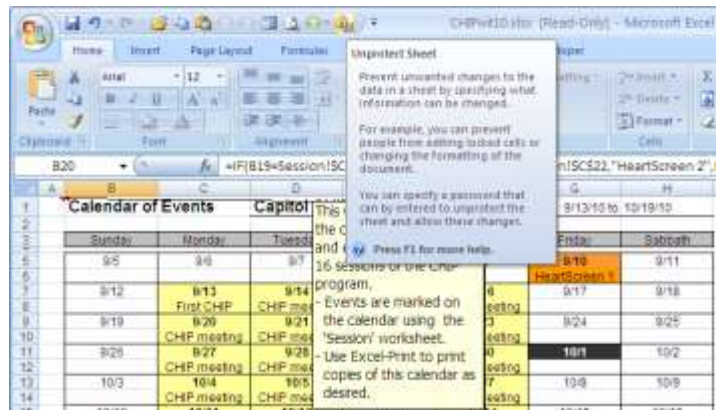
- b. Select the 'HSBlank' sheet. Use Excel Print (round Office button) to print a "master" to make copies as you wish. (the borders and shading show well on a B&W laser printer; printing in color is not necessary)



c. After you mark meeting dates on the calendar in the 'Session' sheet you may print a 1-page calendar for participants. Tab to the 'Calendar' sheet and use Print Preview (Quick Access Toolbar) to review it before printing as many copies as desired. The sheet is "Protected" to prevent unintended changes, but you can modify it before printing by first "Unprotecting" it. (e.g. to add special events)



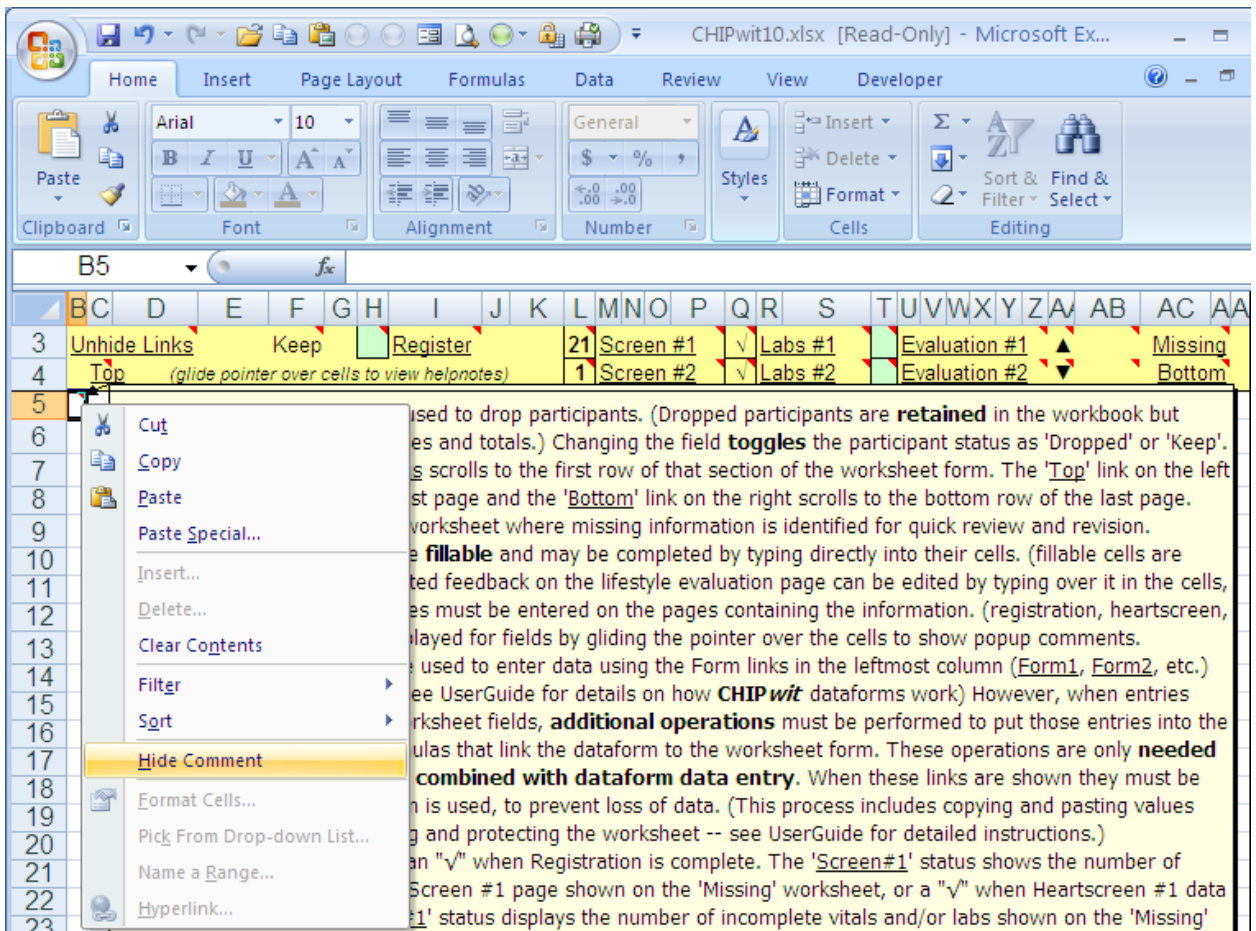
d. Blank Table rosters can also be printed for use in tracking attendance and miles. (When the meeting dates are marked on the 'Session' sheet, the Table roster shows the dates; otherwise they are blank.) Select the 'Table' sheet and use Excel Print to print one or more copies as desired. When filled out these forms may be used to enter table assignments and miles into the 'Participants' sheet.



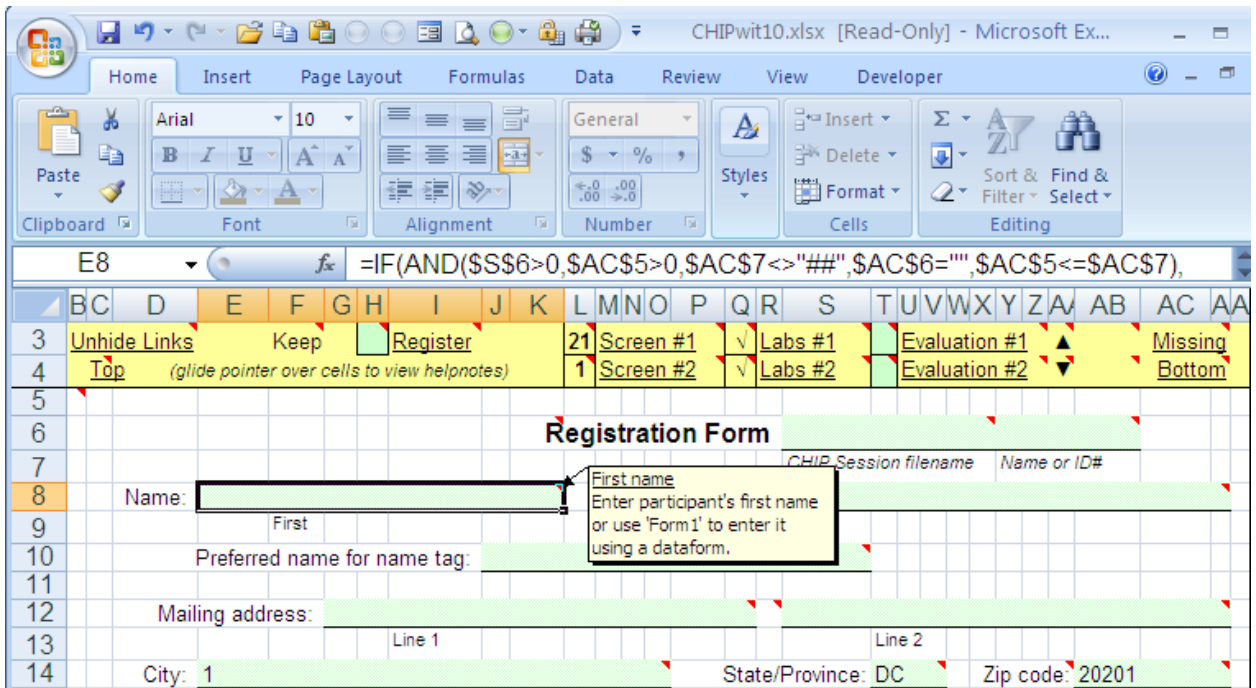
8. You are now ready to enroll participants and enter HeartScreen #1 information as described below. The 'Control' sheet should show the updated status with check-marks for steps #1 & 2, and steps #3-5 should be highlighted with green and bold font indicating they are the next steps to perform.

Step	Ready	Function description	Participant Counts			
1	✓	Register Chapter	Maximum capacity= 10			
2	✓	Register Session	Partial	Complete	Dropped	Unused
3		Register Participants	0	0	0	10
4		Enter HeartScreen #1	0	0		
5		Enter Labs #1	0	0		
6		Print Lifestyle Evaluation #1	0	0		

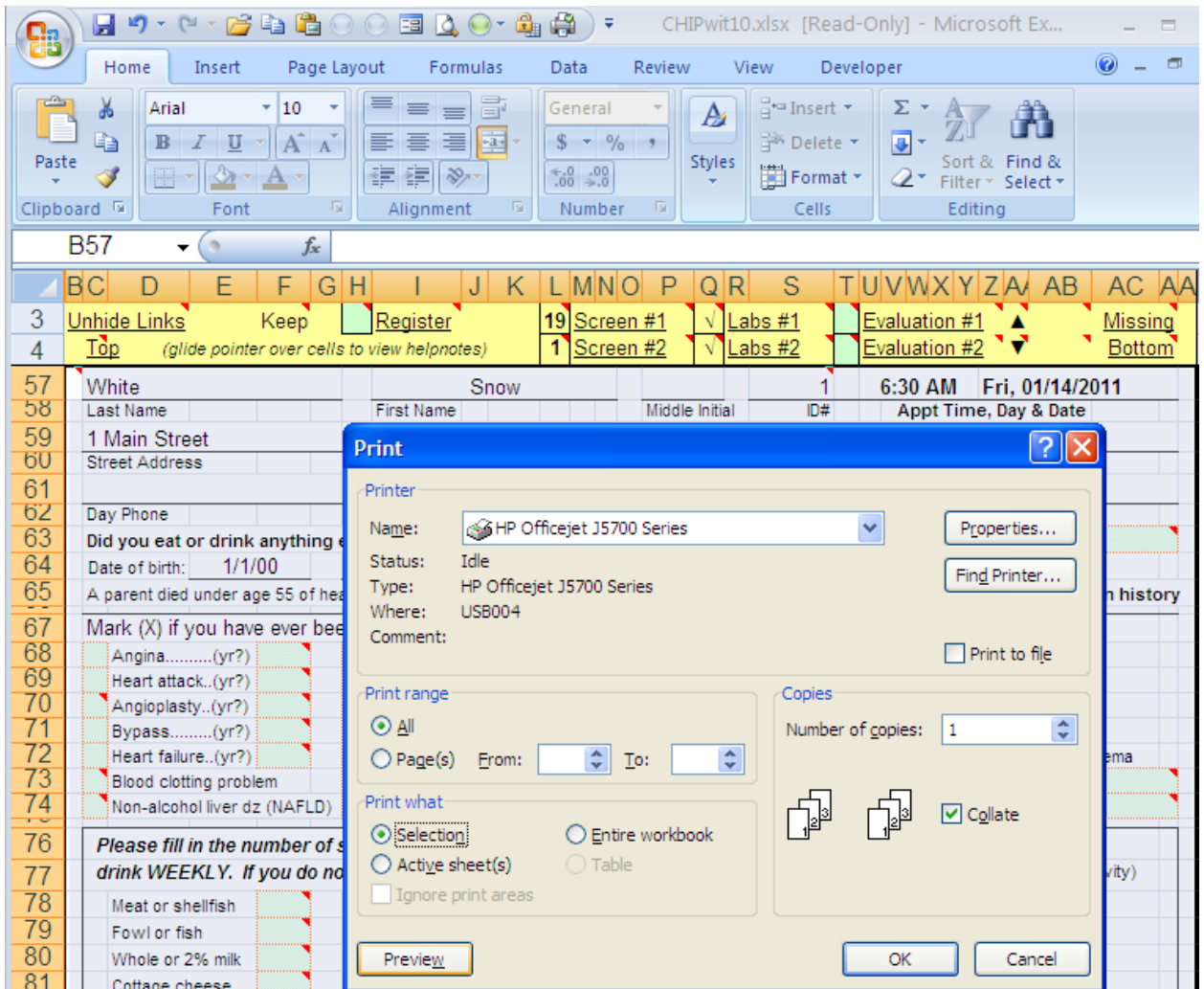
a. Tab to the first unused participant sheet ('1') by clicking the "Register Participants" link or clicking on the '1' sheet tab at the bottom of the workbook window.



- b. Read the helpnote showing at the top of the sheet and then hide it. (see 2.b above) It can be viewed any time by gliding the pointer over the leftmost cell at the top of each row of the sheet. ('B5', 'B57', 'B115', etc.)
- c. Fill out the Registration form by typing directly into the shaded fields.



- d. If you choose to enroll participants using CHIPwit at Info Sessions, after registering each participant you will print a personalized HeartScreen #1 form with their name, contact info and appointment information. This may be done by either clicking the [Screen #1](#) link and choosing the “Selection” option for “Print what,” or by choosing the “Active Sheet(s)” option and printing only page 2. (Use the “Print Preview” icon button on the Quick Access Toolbar or the Office button. See the **CHIPwit** Printing Guide for more details on printing.)



- e. If you enroll participants at or after HeartScreen #1, you will need to use the blank HeartScreen forms described and printed in item #7.b above. Fill in the contact and appointment information at the Information Session before giving the form to the enrollee.
- f. HeartScreen information is entered into the computer using the completed paper copy of the form. Fields to be completed have **light-green** shading.
- g. Medications are entered in the “Medication Box.” (See the **CHIPwit** Medications Guide for step-by-step instructions for entering medications.) Use the “MedType” drop-down list to select the type of medication from the “KEY” shown at the bottom of the form. Only minimal medication information is required for **CHIPwit** to function, but the medication name, indication and dosing may be entered as desired.
- h. After entering all HeartScreen #1 data except labs, which are received later, click the [Screen #2](#) link in the "Instrument panel" at the top of the sheet (see figures above) to select the pages to be printed when the labs are entered. (The [Evaluation #1](#) link may be used instead to print only

the Evaluation #1 pages without the HeartScreen #2 form. See 10.d & 10.e below and review the **CHIPwit** Printing Guide for more explanation about printing options and procedures.)

9. Lab values are best entered into the 'Labs' sheet. (They can also be entered directly into the participant sheet if desired by clicking the Labs #1 link in the "Instrument panel" to scroll to the lab fields on the HeartScreen #1 form.)
 - a. Tab to the 'Labs' sheet and type the lab values in the columns provided, being sure to enter them for the correct participant name. (digital lab reports can be imported with the **CHIPwit** Professional version, but not with the macro-free version)

The screenshot shows an Excel spreadsheet with the following structure:

	A	B	C	D	E	F	G	H	I	J	K	L	M	N
1	Participant		HS#1:				HS#2:							
2	ID#	Name	row	FBS	TChol	HDL	TGL		FBS	TChol	HDL	TGL	row	
3	1	White, Snow												
4	2	,												
5	3	,												
6	4	,												
7	5	,												
8	6	,												
9	7	,												
10	8	,												
11	9	,												
12	10	,												
18														
19														
20														

The callout box contains the following text:

This worksheet is used to **enter lab values** from HeartScreen #1 and #2 (labs can be entered directly into the participant worksheets -- '1', '2', etc. -- but it is usually easier to enter them all in one worksheet)

- Enter **HeartScreen #1 values** for each participant listed in the **left portion** of the form [columns D:H]
- Enter **HeartScreen #2 values** for each participant in the **right portion** of the form [columns I:M]
- Cells are shaded in gray when values in participant worksheet override values entered here.

(use 'Hide Comment' on 'Review' tab to hide this box)

- b. The lab values entered in the 'Labs' sheet automatically appear on the forms in the participant sheets ('1', '2') – no further action is required. (Lab values entered in the individual participant sheets ('1', '2') **override** values entered on the 'Labs' sheet. Overridden values are shown with gray-shading on the 'Labs' sheet.)

10. You are now ready to review the evaluation forms and make any desired changes before printing them. The software automatically adjudicates the evaluation forms and annotates them for you. (Initially you may wish to review the participant sheets to assure that it is adjudicated appropriately, but after using the software you may decide to just review them after printing the forms.)

Hover over cell A1 for helpnotes -- click X's below to go to missir

	A	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P
1	HeartScreen															
2	Data Entry Checklist (x = missing items, red-x = critical info, green-x = warning only)															
3	ID#	1	2	3	4	5	6	7	8	9	10					
4	Fields \Sheet	1	2	3	4	5	6	7	8	9	10		Ranges			
5	Dropped (0)															
6	Gender		x													
7	Birth date			x												
8	Status	x	x													
9	Marital	x	x													
10	FamHx	x	x													
11																
12	Fasting?	x	x													
13	Foods1	x	x													
14	Foods2	x	x													
15	RestStress	x	x													
16	Exercise	x	x													
17	Smoke	x	x													
18	Height	x	x													
19	Weight	x	x													
20																
21	Wrist	x	x													
22	Blood press	x	x													
23																
24	Pulse	x	x													
25	Blood sugar	x	x													
26	Total-chol	x	x													
27	HDL-chol	x	x													
28	Triglycerides	x	x													

This worksheet form identifies the missing data on each participant worksheet form. (01, 02, etc.) It is designed to help quickly find and correct missing or incorrect information.

- Heartscreen data entry fields are listed in the leftmost column. (Items from heartscreen #1 are listed in the top section of the form and heartscreen #2 is in the bottom section.)
- Participants are shown in columns with ID# (01, 02, etc.) and worksheet name across the top of the worksheet. Participants are listed from left to right in the sequence they are shown on the 'Participants' worksheet form, which may be sorted or changed. The ID# serves as the worksheet name unless and until worksheet names are changed. (e.g. to use initials)
- Missing fields are indicated with "x"s. Red "x"s indicate critical information that must be entered. Green "x"s indicate warnings or possible missing information. **Click on the "x"s to scroll to the missing fields.**
- Some items may not be used with each program (e.g. HbA1c), and some items may not be available. (e.g. LDL when TGL >400)
- For a description of what is missing, glide the pointer over the fields listed in the leftmost column and a brief explanation is displayed. The 'Ranges' column contains the cell range of the missing data.

- The first step is to review the 'Missing' sheet for missing information. This sheet lists participants in columns and data fields in rows. Missing data is indicated with an "X" in the column for the participant sheets missing the information. Clicking the "X"s scrolls to the actual fields on participant sheets with the missing data.
- After making any corrections, be sure to click the [Screen #2](#) (or [Evaluation #1](#)) link to select the pages to be printed before leaving the sheet. Do not click any other links after clicking the [Screen #2](#) or [Evaluation #1](#) link or the page selection will be lost. Tab to the 'Missing' sheet to continue the review process using the tab at the bottom of the workbook window.
- After fixing missing information you can either review the forms by tabbing to each sheet in turn ('1', '2') and scrolling up & down to view the forms, or you can use Print Preview to review them

- before printing. (use the Quick Access Toolbar icon or Office button) After getting comfortable with the software you will find that printing and reviewing the paper forms is adequate since you can easily go back and make any changes needed and print individual evaluations as needed.
- d. To print the evaluation forms "en masse," the forms (pp. 3-5) must be selected on each participant's sheet. This is done by clicking the Screen #2 link on each sheet. (clicking immediately after entering HeartScreen data or making any changes is best so you do not have to thumb through the sheets to do it later) The Evaluation #1 link is used when you do **not** want to print the HeartScreen #2 form with Evaluation #1 forms. It may be more efficient to print both in one printing rather than doing a second printing later. (The HeartScreen #2 forms can be pulled out and distributed just before HeartScreen #2 to avoid their being lost.)
 - e. To print "en masse," select multiple participant sheet tabs before performing the Print operation. This is typically done by clicking the tab for the leftmost sheet to be printed (e.g. '1') and scrolling the workbook tabs until the rightmost sheet tab appears, then holding down 'Shift' as that tab is clicked. Sheets for "dropped" participants and unused sheets should **not** be selected since they will be printed if selected. As described elsewhere, if sheets for "dropped" participants are hidden they will not appear and will not be selected for printing. (Sheets may also be selected by holding down 'Ctrl' and clicking on individual sheet tabs.)
 - f. Use Excel Print (Office button) to print the selected sheets. Choose "Selection" under "Print what," then select the desired printer and number of copies. Doing a Preview is recommended before printing a large number of pages. After previewing, just click 'Print' to print the forms.
 - g. Individual sheets can be printed as described by just selecting one sheet tab.
 - h. With **CHIPwit** it is unnecessary to print extra copies of the evaluation forms for each participant since you have a digital copy available at any time. It is more eco-friendly to offer extra copies upon request than to print copies that will not be used.
11. Blank HeartScreen #2 forms are needed a few days before HeartScreen #2. If they were not printed with Evaluation #1, they must be printed. This can be done as described for Evaluation #1 above, except that the Evaluation #1 status must be updated (non-blank) before the Screen #2 link is clicked for each sheet so the HeartScreen #2 form only will print. Follow the procedures described above to select the sheets and print the forms.
 12. Evaluation #2 is a repeat of item #10 above, except for using the Evaluation #2 link. (pages 6-8 of the individual participant sheets) No HeartScreen forms are printed with Evaluation #2 since no further HeartScreens are done. (Copies of the HeartScreen #2 forms could be made and used for additional heartscreens.)
 13. The group summary and charts are printed using the "Group' and 'Charts' sheets. Tab to them and use Excel Print to print their contents. You may also copy and paste their contents in a presentation program such as PowerPoint.
 14. Certificates may be printed using the 'Certificates' sheet. (instructions are found in the helpnotes and UserGuide) Click the "Select forms" link to select the certificates to print. Then use Excel Print with the "Selection" option for "Print What?" to print the certificates on proper paper stock.
 15. The awards may be printed using the 'Awards' sheet. The 'Participants' sheet lists each participant with the changes in major risk factors. Awardees are calculated by the 'Participants' sheet and

linked with the 'Awards' sheet. Awardees may be changed on the 'Awards' sheet to override the automatic assignments. (see 'UserGuide' for details)

16. The 'Export' sheet is used to generate the file to send to the CHIP central database. Tab to the 'Export' sheet and follow the instructions in the comment box.
17. The Beck Depression Index and the Standard Form-36 are included in this copy of the software. Enter "Y" in the 'SF36 & BDI2' optional measures box on the 'Session' worksheet (see 4.f above) to use them to collect data about global health and function. Participants may be given a copy of the BDI-2 and SF-36 with their CHIP questionnaire to fill out before HeartScreen. Responses are entered into the 'BDI2' and 'SF36' sheets. The 'SFBDis' sheet is used to produce a 1-page report for each participant. (It is best not to attempt using these forms with the first use of the software since it makes the learning curve considerably steeper.)
18. There are, of course, more features and functions not described in this brief summary but they are optional and not likely to be something to attempt using with your first CHIP program. Two features are worth noting that can save time.
 - a. "Short-cuts" are provided for entering addresses. Common cities entered in the Short-cut table on the 'Session' sheet can be entered on the Registration form by entering a digit from 1-5 in the "city" field. (Entering the ID# number of a registered participant in the address field will bring up that participant's complete address. This is especially helpful for couples.)

The screenshot shows an Excel spreadsheet titled 'CHIP13 Sep 2010.xlsx'. The active cell contains the formula: `=IF(OR(ISBLANK(F16),AG16="###"),"",AG16)`. The spreadsheet is divided into sections: 'CHIP Chapter and Session Descriptive Information', 'Chapter Information', and 'City Short-cut Table'. The 'Chapter Information' section includes fields for Chapter name (Rocky Mount SDA CHIP), Organization (RM LHC), Address 1 (PO Box 367), Address 2 (350 Tanyard Road), City (Rocky Mount), State (VA), Zip code (24151), and Country (USA). The 'City Short-cut Table' has columns for Code, City, State, and Zip. A callout box points to the entry for Code 3, stating: 'Short-cut digit 3 is assigned to this City, State & Zip'.

Code	City	State	Zip
1	Rocky Mount	VA	24151
2			
3			
4			
5			

- b. The sheet names listed on the 'Panel' sheet may be used to tab to the sheets in the workbook. Just click on the name to tab to the sheet. This is often easier than finding the sheet tab at the bottom of the workbook. (The color of the sheet names corresponds to the tab color of the sheets.)

	A	B	C	D	E	F	G
1	Help Note	Ready	(glide pointer over cell A1 to view <i>helpnote</i>)				UserGuide
2	Step	Ready	Function description	Participant Counts			
3	1	√	Register Chapter	Maximum capacity= 50			
4	2	√	Register Session	Partial	Complete	Dropped	Unused
5	3		Register Participants	0	0	0	50
6	4		Enter HeartScreen #1	0	0		
7	5		Enter Labs #1	0	0		
8	6		Print Lifestyle Evaluation #1	0	0		
9	7		Enter HeartScreen #2	0	0		
10	8		Enter Labs #2	0	0		
11	9		Print Lifestyle Evaluation #2	0	0		
12	10		Print Group Summary				
13	11		Export CHIP data				
14	No.	Spreadsheets in this workbook		No.	Glide the pointer over the number of the spreadsheets listed below to view a		
15	1	Panel		14	brier description of their content and function. They are listed here with the		
16	2	Session		15	tab colors in the order they appear in		
17	3	Participants		16	the workbook. (L to R) All spreadsheets		
18	4	Missing		17	are protected (no passwords) to avoid		
19	5	1, 2, 3, etc.		18	unintended changes. The hidden		
20	6	Labs		19	worksheets are listed last.		
21	7	SF36		20	Survey		
22	8	BDI2		21	USurveys		
23	9	SFBDI		22	Data		
24	10	Group		23	Export		
25	11	Charts		24	UserGuide		
26	12	Certificate		25	Calendar		
27	13	Awards		26	0 (hidden)		
28				27	Stratify (hidden)		