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- 1 Overview of CHIPwit with function descriptions and overall system design** Pix **2**
    - A **CHIPwit Pro** uses an Excel workbook template with specially-designed worksheets and **macros** to automate administration of the CHIP intensive lifestyle education program. The **macro-free basic version** does many of the same things, but **without macros**. The basic version is simpler but requires more manual operations.
    - B The following administrative functions are automated:
      - 1 participant enrollment (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 Export),
      - 4 summation of results for presentation (CHIPwit Powerpoint),
      - 5 and recording and printing follow-up measures.
    - C **CHIPwit Pro** automatically updates the Summary workbook and the presentation Powerpoint with information about each participant for each session. (Macro-free

version does not include these features.)

## 2 Starting a new Chapter

3

- A The **CHIPwit** software is distributed ready to use. Before opening it, copy it to a file folder where you will keep all the workbooks for the new chapter. (e.g. C:\...\My Documents\Anycity CHIP)
- B The file is password protected and can only be opened using a valid chapter code. It is also 'Read-only' and must be saved using 'Save-As' with a new name.
- C After opening the Excel file (use chapter code for the password), tab to the '**Session**' worksheet and register the chapter by completing the top section of the worksheet.
- D Headings for the participant forms may be modified using the "Print Headings" fields. What is entered in these fields is shown in the headings for the participant forms.
- E Up to five "address short-cuts" may be created by completing the City Short-cut Table.
- F Under the City Short-cut Table is the "Optional Fields" block. Entering a "Y" in any of the four optional fields will activate those field(s) for use during HeartScreens. Fields not containing a "Y" will not be shown on the forms and cannot be used.
- G Save the workbook (using Excel 'Save-As') with a suitable name so it can be used to register each new CHIP session. (Save the file with a 'Read-only' password to avoid unintentional changes to the master.)
- H A **temporary authorization code** of '**99999**' can be used to register the chapter but must be updated to continue using production copies of the software.

## 3 Starting a new Session

4

- A New CHIP sessions can only be registered after the new chapter is registered. (see section #2.C above) CHIP sessions can only be started (registered) using the chapter Master workbook that was saved after a valid Chapter Code was entered. (#2.G)
- B Each new CHIP session conducted by the chapter is saved as 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') Do **not** use pound sign ("#") in the name
- C Any number of sessions can be registered by a single chapter, so there is essentially no limit to the number of sessions available. Each copy of the software has a maximum number of participants, the **capacity** of the workbook. CHIPwit Summary is a workbook that combines multiple workbooks into one group. (**CHIPwitPro** has unlimited capacity.)
- D New sessions are registered using the bottom section of the '**Session**' worksheet each time a CHIP program is organized and conducted. All of the information is required for proper processing of the session. (Fees and HeartScreen appointment data is required before the blank Registration and HSBlank forms can be printed.)
- E Information from previous Session workbooks may be imported to register new sessions using the 'Session to Import' function on the '**Session**' worksheet.  
This feature allows the following data to be imported from **CHIPwit** workbooks:
  - 1 City-State Shortcuts
  - 2 Heartscreen Stations (optional)
  - 3 General Session information (address, configuration)
  - 4 CHIP meeting Calendar structure (optional)
  - 5 Fees
- F The dates of the program are validated to minimize data entry errors. The date for HeartScreen #1 should be no more than 9 days prior to the Start date for the program. The End date must come after the Start date, and the HeartScreen #2 date should be

not more than 7 days before the End date.

- G The **Calendar** is automatically marked with the HeartScreens and Start and End dates. Meeting dates between the Start and End dates may be "marked" by clicking on the cells with the desired dates and hitting 'F9' to change the formula into text and then hitting 'Enter.' Dates are **unmarked** by clicking the cells and turning the contents into text by typing a single quote (') in front of the date value. (Unmarked dates can be marked again [toggled] by removing the leading single quote to turn the text into a number.)
- I **Marked** dates are shown with gray shading. HeartScreen dates are shown with orange shading, and Graduation with green shading.
- J Until the correct number of dates are marked, the meeting count cell shows orange shading to indicate all meetings are not yet marked on the calendar.
- K The dates marked show on the '**Table**' worksheet roster where attendance and miles are recorded for each table at each meeting. Use the '**Calendar**' worksheet to view and print copies of the calendar.

#### 4 Preparing for Information sessions

5

- A New participants are typically enrolled in the CHIP program (session) at the close of an Information session using a Registration form. A blank Registration form is printed for each new CHIP session and used to register participants at Information sessions. The '**Registration**' worksheet is used to print the blank form. (Additional copies can be printed anytime using the Excel-Print function.)
- B Those who wish to enroll fill out a blank Registration form with their name, status, fees and other information. The completed forms are entered into the workbook to enroll participants at the close of the Info session and a personalized HeartScreen form is printed for them to complete. (Alternatively, a blank HeartScreen form may be given to enrollees and all data may be entered later. (see section #5 below)

#### 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 in the workbook for the session. (The **CHIPwit** workbook should be open before proceeding.)
- B Registrants are enrolled by entering information from the Registration forms, beginning with the first participant worksheet, '1', and proceeding with each numbered worksheet in order. (e.g. '2', '3', etc.)
- C Enter information from the completed Registration form into the worksheet. (worksheet forms look just like the paper forms) Information from the paper form can be typed directly into the worksheet, **or** the dataform links provided in column-A can be used to enter data. The dataform column [col-A] is hidden when dataforms are not utilized.
- D (The two methods can be mixed during data entry, but anything entered directly into the worksheet must be copied to the dataform before using it. Thus, when data has been entered into the worksheet, additional steps are required before using a dataform link. These steps will be automatically displayed and must be performed before using a dataform after entering data directly into the worksheet.)
- E The HeartScreen appointment time slot selected by the enrollee is entered on the Registration form and entered into the worksheet form.
- F After all information is entered, the HeartScreen #1 lifestyle assessment **form** is printed

and given to the participant to complete and bring to the HeartScreen event.

**Alternatively**, a blank **master** form can be printed using the '**HSBlank**' worksheet and given to participants so nothing need be entered into the computer at the Information sessions. (Using this approach, data entry is batched after HeartScreen #1 and before distributing the evaluations to participants.)

- G The form is given to the participant to **fill out** and bring to HeartScreen at the appointed time. The form contains participant name and appointment -- everything is on the one paper form that includes a section to record their medications.
- H Text on the participant forms can be revised on the template worksheet, "0". Changing the text on the template will result in changing the text on all participant worksheets. Text labels for risk stratification bar graphs can be revised on the 'Group' worksheet.

## 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 made, recorded and reviewed.
- B Participants are scheduled to arrive in blocks every 15 minutes at a rate intended to match the rate at which measures can be collected. Typically the blood draw station is the rate-limiting step. (the one that limits the workflow) The maximum number of participants to schedule in a 15-minute block is specified on the 'Session' worksheet form (cell \$E\$23). A single phlebotomist can typically complete 3-4 blood draws every 15 minutes.
- C The list of stations and the measures taken at each is specified on the 'Session' worksheet form and shown on the 'HeartScreen' worksheet form. The list can be revised to reflect whatever arrangement best suits the team.
- D The printed posters contain a large digit and the task list to identify the various stations and guide traffic during the heartscreen event. (see [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. The list and the signs are printed using the Excel Print function. (see [Pix](#))

## 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 gray-shaded box for recording measures during HeartScreen. The form is carried from station to station by the participant. Each station takes the measures and records them in the proper place on the form.
- C The form can be entered into the workbook while the participant is eating breakfast. All data should be entered before the form & medication review where it is checked for completeness.
- D HeartScreen data is entered by clicking on the workbook tab for each participant and either typing directly into the form or using the dataforms hyperlinked in the 'Forms & Links' column.

- G Vitals and labs are entered by typing them directly into the workbook form or by using the dataforms hyperlinked in the 'Dataform Links' column-A.
- H **Medication** "MedType" is entered using the drop-down lists for each medication line. For many medications this is all that is required, although you may wish to enter dosing and/or medication name. Medications are selected from the drop-down list or typed into the field. Reason and dosing is usually suggested with the medication selected from the list. Medication reasons recognized and tracked by **CHIPwit** are shown in **bold italics**. Missing information is indicated by orange shading in the field.
- I The "medication review" station reviews the medications and chooses the two primary goals for participation. It typically also includes distributing and explaining the **JumpStart** booklet.
- J 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' worksheet form as a text or spreadsheet file and then parsed into the lab table with cell formulas. 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 participant.
- K Lab values entered directly into the worksheet form are shown in **bold** and take precedence over values entered into the lab table in the 'Labs' workbook form.
- L After all data is entered into the workbook for all participants, you are ready to proceed to the next step -- the lifestyle evaluations.
- M Pop-up helpnote comments are displayed by gliding the pointer over the fields on the form. (helpnote comments can be edited after unprotecting the worksheet)
- N By the second meeting participants should have selected the table they will sit with for the remainder of the program. Table assignments are entered into the '**Participants**' worksheet form. Once the tables are entered, a summary list appears showing the number of participants at each table and the total miles from the "Today" column for the table.
- O Miles are tallied on the 'Participants' worksheet form by typing directly into the 'Today' column of **green-shaded** cells [col-K]. The 'Total' miles column [col-L] must be updated with the 'Today' miles before entering more miles. (Always enter miles only into blank cells to avoid losing miles in the 'Total' column [L].)
- P Miles are entered from the attendance / exercise records for each participant. Miles may be entered for each meeting, but total miles can also be entered only at the end of the program. When miles are entered, CHIPwit tallies them to make awards. Miles entered in the 'Today' column are totalled for each table in the table list. The table with the most miles is flagged with '\*\*\*' and the table with next most miles with '\*'. The mascot can be given to the table with the most miles to encourage physical activity.

## 8 Using the Labs form to enter or import electronic lab reports

9

- A This function is fully automated in **CHIPwit Pro**. (see item #8.C below) The following section describe the process used in the standard version of the software.

- B The printed lab results may be entered directly into each participant's worksheet form or all lab reports can be entered into the '**Labs**' worksheet form where they will be picked up by each participant's worksheet form, thus saving data entry time. The '**Labs**' worksheet form includes a row for each participant. Enter the beginning lab values in the left columns and the ending lab values to the right of that. (see headings on the form) If a digital lab report is available it may be used to 'Copy-Paste' lab values into the assigned cells in the '**Labs**' form instead of typing them.
- C **CHIPwit Pro** provides features to automatically import electronic lab reports into the workbook, eliminating manual data entry. Once this process is established it is automatically repeated for all subsequent CHIP sessions using the same laboratory. (Macros parse digital data to separate it and identify the labs.)  
First, download the electronic file to your computer, usually in the CHIP Session folder. (This file can be deleted later.) Then open the active CHIPwit Session and, from within Excel, open the file with 'File-Open...'. Select the proper file type (text or Excel, etc.) and then select the saved file. (see ) When opening a text file, delimiters must be specified to properly parse the data. (see  )
- D After the file is open, move it to the end of the CHIPwit workbook using the 'Edit-Move or Copy Sheet...' function and selecting the CHIPwit workbook. (see  )
- E Once the file is moved into the workbook, the worksheet name must be typed into the top row of the 'Labs' worksheet form to activate automated parsing. The 'Labs' worksheet form contains two green-shaded boxes at the top, one for HeartScreen #1 and one for HeartScreen #2. The names of the electronic/digital files imported are typed in these boxes. (see ) Once that is done the parsed lab values should appear in the cells below the yellow headings, (see ) and also in the appropriate workbook HeartScreen forms. (see )
- F If the lab values do NOT appear, something may have gone wrong during the importing process. The wrong file may have been opened, or improper delimiting may have been selected, etc. Maybe the file format is one CHIPwit cannot handle. If that is the case you will need to contact the CHIPwit support team 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 or corrected labs are received separate from the file already imported. (CHIPwit cannot handle more than one file for each lab report)

## 9 Preparing and printing Lifestyle Evaluation #1

10

- A All information from HeartScreen, including labs, must be entered and complete before the evaluations can be prepared and printed. Review the '**Participants**' and '**Missing**' worksheets to see what may be missing. Click on the "X"s to scroll to the actual fields involved and make any needed changes. (use the 'Missing' link to return)
- B Review each participant's worksheet (e.g. '1', '2') evaluation form (page 3) and make any revisions. Evaluation feedback is provided automatically using Excel formulas. All of these annotations can be altered by typing over them.
- C Red ovals or other graphics can be added by pasting and formatting them to flag the

desired fields. Wordart comments can also be pasted to provide high-impact feedback.

- D Individualized comments are automatically entered below each of the two primary goals selected by the participant. These may be manually revised by the reviewer before printing the evaluations for distribution.
- E After all revisions are made for each participant in turn, click the [Evaluation#1](#) link at the top of the worksheet to select the pages to print for evaluation #1. (pp. 3-4) If you do NOT select the desired pages you cannot use the "Selection" option when printing! After revising the evaluations for all participants not "dropped," you are ready to print the evaluation forms for distribution. Use the Excel Print function (Office button) to print the completed lifestyle evaluation #1 forms (pp. 3-4).
- F To **print more than one participant at a time** you must have the desired pages selected on each worksheet to be printed and use the "Selection" option under "Print what" on the Print dialog box. (section 9.E above) Select multiple worksheet tabs (click the leftmost tab and scroll the rightmost worksheet tab into view, then hold down 'Shift' while clicking the last tab) and perform the Excel Print function (using Office button). Choose "Selection" under "Print what" and choose the desired printer and number of copies. If you do NOT choose "Selection" in the "Print what" section, all pages for each worksheet tab selected will print! Choose the desired printer and # copies. (Click "Preview" to review the pages before printing to avoid unintended mistakes.)
- G If the forms are to be emailed to participants, they should be converted to a suitable format such as an Adobe PDF file. (This can be done with a file conversion program such as 'PDF Creator.')
- H Each worksheet must be prepared separately for emailing so participants receive ONLY their own evaluation forms.
- H Two copies are usually printed for each participant, one for the participant and one for their physician. Extra copies of the form(s) can be printed later using this same routine.
- I **Headings** for the forms are defined on the 'Session' worksheet and may be edited there. (see #2.E above) The left heading defaults to 'Organization name' and 'Phone'; the center heading to "CHIP Lifestyle Evaluation"; the right heading to 'Line 1 address' and 'City, State Zip'. These default headings can be changed by typing the desired text and/or formulas into the appropriate fields on the 'Session' worksheet.

## 10 Preparing for HeartScreen #2

[11](#)

- A After the lifestyle evaluations are distributed and before the second heartscreen event, HeartScreen #2 assessment forms need to be printed and distributed to the participants. Use the Excel-Print function to print page 4 of the worksheet forms. ('1', '2', etc.)
- B These forms include the participant's name, appointment time and medical conditions from HeartScreen #1. The dietary, rest and stress, exercise and medication fields are blank and ready to be filled in.
- C The forms should be completed by the participant and brought to heartscreen #2. If the completed form is not brought another copy may be printed from the workbook and completed 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 dataforms shown on the right. [col AE]
- C Some fields are included that are not present on heartscreen #1. Medication dosing from heartscreen #1 is shown with a column for current dosing to be filled in. Dosing can be entered as 'same' or 'no change' 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 with HeartScreen #1 (item #8 above), importing electronic data when possible. (Similar cell formulas can be used to format the labs in the '**Labs**' worksheet table as used with HeastScreen #1.)
- E When 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 #9 above. (9.A - 9.G) Lifestyle Evaluation #2 (page 5) also includes a summary of changes. (pp. 6-7) included with Lifestyle Evaluation #1 (page 3).
- B If the Beck Depression Inventory and/or the Rand SF-36 Questionnaire is used, this step will also include preparing and printing the '**SFBDIs**' worksheet scores for each participant.
- C The average scores for the group are included in a scoring form that may be printed and distributed to each participant. Use the Excel-Print function to print the 1-page per participant report. The Standard function questionnaire measures eight components of health and function. The Beck depression inventory is the accepted measure of clinical depression. Scores are standardized to 100%.

## 13 Preparing for the "results" event (graduation)

14

- A In addition to the lifestyle evaluations from heartscreen #2, there are a number of other items that must be prepared for the Graduation event.
- B Use Excel-Print function to print the '**Group**' worksheet summary totals for the group. This summary shows the averages for the Session. (weight change, blood pressure change, etc.) The '**Charts**' worksheet contains barcharts of the group summary that may be printed or copied to a PowerPoint slide to share at Graduation.
- C Use the '**Certificates**' worksheet to print a certificate of completion for each qualifying participant. Enter an ID# in cell 'D9' and use the Excel-Print function to print a certificate. (Participants who have been 'dropped' typically do not qualify for certificates.)
- D Use the '**Awards**' worksheet to prepare and print recognition awards for participants. This worksheet contains eight (8) pages with a different award on each page, and a blank award on page 9.
- E Awards are assigned to participants by CHIPwit based on the changes in their risk

factors shown in the '**Participants**' worksheet. (flagged with '\*\*') Individuals qualifying for multiple awards are only awarded for their top performance and other awards are assigned to those 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 most miles walked. The ladies are flagged with plus signs. ('++' and '+')

F Award assignments are altered by making changes on the '**Participants**' worksheet.

Awardees and runner-ups are listed at the bottom of the worksheet. (see Pix pix)

Changing these ID#s will assign the awards to the the ID# entered under each risk category shown. Awards that are not desired may be discarded or not printed.

G A program evaluation survey should be completed by each participant at one of the last meetings. A suggested questionnaire is included with CHIPwit. ('USurvey.docx')

H The '**USurveys**' worksheet may be used to tabulate responses to better assess the strengths and weaknesses of the program. The questions are listed in rows and participants are grouped by table in columns. Totals are calculated for participants and tables, and overall.

#### 14 Exporting and sending the CHIP Assistant data

[15](#)

A At the end of the CHIP session, data is extracted and prepared for transmission to the central CHIP database. The necessary file is prepared using the '**Export**' worksheet.

Dropped participants and unused records are deleted from the exported data.

B Confirm that all information has been entered and the lifestyle evaluations are complete before proceeding. Follow instructions in the helpnote to enter the date in text format into the upper-left cell, 'A1.'

C Copy the 'Export' worksheet (use 'Copy/Move sheet' under 'Format' on the 'Home' tab) to a new book, leaving the original in CHIPwit with the date in text format.

D Select and 'Copy' all rows, then do a 'Paste-values' to remove all formulas. Sort the rows by column-A in descending sequence to put the unused and dropped records at the bottom. Then select and delete any records with a "1" in column-A in the bottom rows

E Finally, delete column-A and save the new workbook with a suitable name to identify it for emailing it to the CHIP database. ("CHIPwitAsst.xlsx") This file should be attached to an email and sent to the designated email address given in CHIP materials.

F **CHIPwit Pro** will export data to the CHIPwitSummary and CHIPwitPPTemplate files as well. (see topics #16 & #17 below)

#### 15 Preparing for, entering and printing Follow-up measures

[16](#)

A Follow-up measures may be collected on the last page of each participant's worksheet. ('1', '2', etc.) Use the last page (p. 9) of the participate worksheet to record and print follow-up measures for each participant.

B Up to three follow-up blood tests can be entered into the final page of the worksheet. The 6-variable line graph updates automatically and prints when the page is printed.

C The forms are printed using the Excel File->Print function. (see section 9.F above)

## 16 Using the **CHIPwitSummary** workbook

[17](#)

- A Data from **CHIPwit** workbooks is exported to the **CHIPwit** Summary workbook by the 'Export Data' function. (A CHIPAsst file is also created for emailing to the central CHIP database.) This function requires you to identify the Summary workbook to open and export 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, FBS and 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 Pro** 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 **CHIPwitPPTemplate PowerPoint (CHIPwit Pro only)**

[18](#)

## 18 Processing external measures (**CHIPwit Pro only**)

[19](#)

- C The SF-36 (Rand v1) and BDI-2 (Beck Depression Inventory, v2) are automatically included as external measures and may be used to collect measures of health status during the HeartScreens. The questionnaires are distributed with the HeartScreen assessment form and completed by the participant to be turned in at HeartScreen.
- D In **CHIPwit Basic**, responses are entered using the '**SF36**' and '**BDI2**' worksheets. In **CHIPwit Pro** responses are entered using the external measures data entry forms executed with the 'Enter Data' function buttons on '**SF36**' and '**BDI2**' worksheets.
- E Summary scores are shown on the lifestyle evaluation forms and a 1-page interpretative report is provided for each participant using the '**SFBDIs**' worksheet .
- F Full data collection for research purposes is provided by collecting complete individual responses. (The data can be exported for use in other software using Excel features.)

## 19 Helpful Hints and shortcuts

[20](#)

- A Create a file folder for each new chapter and copy the files distributed with **CHIPwit** into the folder. To register the chapter, 'Open' (execute) the CHIPwit.xlsx file.
- B Each session will create a new copy of the CHIPwit workbook. A new file folder may

be created for each new session with its workbook, but it will be simpler to keep all session workbooks in the chapter file folder.

- Pix** C **CHIPwit Pro** customizes the **right-click shortcut menu** to quickly find help and navigate. The shortcut menu options and their functions are listed below.
- 1 Popup help -- this menu option displays and updates the "post-it" help notes on the heartscreen forms. (It is equivalent to clicking 'Help' on the heartscreen forms.)
  - 2 Expand/Collapse form -- this menu option expands and collapses the heartscreen forms for viewing portions of the form not in use for the current CHIP process. (It is equivalent to clicking 'Exp/C' on the individual participant worksheet forms.)
  - Pix** 3 GoTo... -- this menu option offers a drop-down list for navigation to the various worksheets/forms in the workbook.
  - Pix** 4 Paste... -- this menu option offers two selections, one to paste red rectangles and another to paste wordart comments to the lifestyle evaluation forms.
- Pix** D In **CHIPwit Pro** the **right-click menu** can be turned 'on' and 'off' by clicking the toggle button at the bottom-right corner of the '**TaskList**' worksheet control panel. The toggle setting is **retained** when the workbook is closed and re-opened.
- E The **pop-up Post-it helpnotes** for cells in the participant HeartScreen forms are stored in cell comments in the worksheets. These helpnotes provide contextualized help for data entry and completion of the lifestyle evaluation forms.

## 20 Programming technicalities and other information for "nerds"

[21](#)

- Pix** A The 'Tools->References' in the Visual Basic Editor window must be set to include Powerpoint and Excel in both PowerPoint and Excel libraries for the macros to work since these macros must execute across applications.
- B The macros are digitally-signed so they do not trip security protection when opening these documents after the certificate is once accepted.
- C The documents and workbook are protected to prevent accidental alteration of protected cells and information. (e.g. formulas) Passwords are not used for some of the worksheets commonly needed so the worksheets can be unprotected and altered. Exercise extreme caution and care -- there are many very complex and inter-related formulas in the workbook.
- D The '**0**' worksheet serves as the master template for participant worksheets ('1', '2', etc.) It also serves as a repository to restore cell formulas after the dataform is populated with any data entered directly into the worksheet and executed to provide data entry using the dataforms.
- E Some dataforms are generated using separate worksheets in the workbook to avoid confusion on the part of the Excel showdataform function. These worksheets are hidden and are not made visible when the dataforms are executed.
- F Most data is stored in the data rows of the dataforms in the participant worksheets. Relevant medications are summarized in the database ('**Data**' worksheet) but detailed medication information is not stored anywhere besides the individual heartscreen forms.

## 21 Using Progress notes (CHIPwit Pro only)

[22](#)

## 22 Adding new Medications and Goals to the Lists

[23](#)

- A All participant worksheet forms use the medication and goal lists in the 'UserGuide' worksheet to lookup relevant information. The lists should be kept sorted in ascending sequence.
- B Use the '[Meds](#)' and '[Goals](#)' hyperlinks in the top panel to scroll to the list of interest. Then use the 'Insert' hyperlink to scroll to the proper cells to insert for a new entry. After using 'Insert cells' on the 'Home' tab (use the 'Shift cells down' option), enter the appropriate information.
- C For medications, enter the name in the first column, typical indication (reason for taking) in the second column, "=ROW()" in the third column, typical dosing (mg, IU's, etc.) in the fourth column, and frequency in the fifth column. (When there is no "typical" dose or other information, just leave the fourth column blank.)
- D For goals, enter the goal and specific lifestyle instructions important in achieving the goal. (Try not to duplicate the instructions used for other goals.)
- E After new entries are complete the list should be sorted in ascending sequence. This is best done by clicking the '[Sort](#)' hyperlink in the top panel (for [Meds](#) or [Goals](#)) to select the proper list, and then use the A-Z ascending sort option on the 'Data' tab.
- F You will need to 'Unprotect' the worksheet to make the changes. Be sure to 'Protect' the worksheet after making the changes.

## 23 Appendix and glossary

[TOC](#)

A	1	Add participant	Function used to add participants to CHIP sessions
	2	<a href="#">Authorization code</a>	Code required to register a new CHIP chapter using CHIPwit
B	1	<a href="#">Beck Depression Inv</a>	A questionnaire used to assess clinical depression
	2	Blank forms	Blank forms are provided for Info sessions, Table miles, and HeartScreens (when unable to update in realtime)
C	1	<a href="#">Calendar</a>	Calendar is provided to plan the CHIP meetings & events
E	1	<a href="#">External measures</a>	Measures not included in the HeartScreen assessment
I	1	<a href="#">Import Session</a>	Function used to copy information from previous sessions
M	1	<a href="#">Miles</a>	Activity is recorded as miles in the 'Participants' worksheet
S	1	<a href="#">SF-36</a>	A questionnaire used to assess general health status & function
Z	99		placeholder - end of Glossary

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