Health Tracking Guide

Chancery SMS

PEARSON

Released December 2008

This edition applies to Release 6.7 of the Chancery SMS software product and to all subsequent releases and modifications until otherwise indicated in new editions or updates.

Contents

About Chancery SMS

Welcome to Chancery SMS® from Pearson. Chancery SMS is a software tool for managing student and family information in your school district.

Support Services Available

Chancery offers a full suite of documentation, online Help, and technical support to help you with your day-to-day tasks.

Documentation Included

The following documentation is included with Chancery SMS:

Type	Description
Chancery SMS Guides	The following guides are available in PDF format from our support web site at *https://powersource.pearsonschoolsystems.com*: • District Administration Guide: For district administrators, the District Administration Guide provides information about maintaining the centralized Chancery SMS solution, including setting up your district, adding schools to the district, and standardizing data across the district using setup lists. • District User Guide: For district office staff, the District User Guide provides information about using Chancery SMS at a district level, including registering and enrolling students and working with student data. • School Administration Guide: For school administrators, the School Administration Guide provides information about maintaining a school and performing administrative tasks. • School Setup Guide: The School Setup Guide provides information about setting up schools in the district, including the steps to be performed as a district administrator and as a school administrator. • School User Guide: For school office staff, the School User Guide provides information about using Chancery SMS at the school level, including how to take attendance, enter grades, and work with student data in the office. • Chancery SMS in the Classroom: This guide covers the basics of using Chancery SMS at the homeroom and class level, including how to take attendance, enter grades, and work with student data in the classroom.

Type	Description
Chancery SMS Speciality Guides	Additional feature-specific guides to supplement the standard guides are available in PDF format from our support web site at *https://powersource.pearsonschoolsystems.com*: • Address Validation Guide: For school and district administrators, the Address Validation Guide provides information about setting up address validation at the district and performing address validation tasks at the district and at schools. • cTools Guide: This guide provides information about customizing Chancery SMS, along with instructions for using the customization features. • Grading Setup Guide: For school administrators, the Grading Setup Guide provides information about setting up grading properties and performing grading-related tasks. • Health Tracking Guide: For district and school users who, this guide describes the process of setting up and using the health feature in Chancery SMS, including immunization calculations. • Permanent Record Guide: For districts who have converted to the permanent record feature in Chancery SMS, this guide provides information and instructions for using the permanent record functionality. • Permissions Guide: For district administrators, this guide provides information about setting up permissions in Chancery SMS. The Permissions Guide explains the permission structure and provides information about each permission’s dependencies, effect on the system, options, and defaults. • Program Management Guide: For district and school administrators and district and school staff who enroll students and process applications, the Program Management Guide is a feature-specific guide that describes the process of setting up programs at the district and at schools and performing program-related tasks. • Registration and Enrollment Quick Guide: For school and district staff, the Registration and Enrollment Quick Guide provides procedures for registering students in the district and enrolling students in schools. • Scheduling Guide: For school administrators, the Scheduling Guide covers the process of setting up a school scheduling structure, as well as scheduling in elementary and secondary schools. • Next-Year Preparation and Year-End Processing Guide: For district and school administrators, this guide covers all the steps required to close off the current school year and prepare for the next.

Type	Description
Chancery SMS Technical Guides	Technical guides are available in PDF format from our support web site at *https://powersource.pearsonschoolsystems.com*: • Import/Export Guide: For district administrators, the Import/Export Guide describes the process for importing and exporting data into and out of Chancery SMS. • Interoperability Guide: For district administrators, the Interoperability Guide covers how to integrate third-party applications with Chancery SMS using SIF and Import/Export functionality. • Report Writer Guide: For district and school administrators and third-party report writers, the Report Writer Guide covers how to plan, build, and upload reports using the new reporting framework. The guide also includes an in-depth examination of this framework, extensive information about how to use Crystal Reports® functionality, and reference material about using previous reporting methods.
Chancery SMS Online Help	Help is available by accessing the Help menu from the task bar.
Release Notes	Release Notes are summaries of the new features and changes in the current release.
Installation Documentation	The Installation Guide provides technical details for installing the entire Chancery SMS system. The Upgrade Guide provides detailed instructions for upgrading from a prior version of Chancery SMS.

Getting Training

Training courses are available to help ensure you get every advantage from your student information system. We are committed to helping you put our solutions to work. Our broad training offerings are designed with you in mind so that you'll receive the most suitable and effective training for your needs.

Choose from on site training or live online training. We can also create a customized training program to meet your district's needs.

Phone us toll free at 1-800-999-9931 or see the Training area of our customer support web site at *https://powersource.pearsonschoolsystems.com* for an up-to-date list of scheduled courses.

Getting Support

The following support programs are available by subscription only:

Support	Description
One-on-one Technical Support	Talk to a technical support analyst to help solve problems and answer questions when software doesn't produce the expected results. Analysts can use the telephone or Internet access to troubleshoot your issues. Monday to Friday, 5 am to 5 pm Pacific Time Phone: 1-800-688-9939 Fax: 1-800-446-5650 Email: psstechsupp@pearson.com
Access to our web site	*https://powersource.pearsonschoolsystems.com* Our web site includes a searchable KnowledgeBase with frequently asked questions, tips, and troubleshooting instructions, as well as support forums for users to share experience and knowledge.
Software updates	Releases of new versions with improved functions and software updates. Updates are provided free of charge for three months from your date of purchase and are included in the subscription to Support Programs.

For more information about Technical Support Programs, phone Customer Service at 1-800-999-9931.

Introduction

Use Chancery SMS to monitor, manage, and report on data concerning students’ physical and emotional health. Track a student’s health condition and medication prescribed, immunization and examination status, and pregnancy, vision, hearing, dental, and social/emotional screenings.

You can define rules for immunizations. The rules can be based on the immunization type, the student's age, and the number of doses required. Enter exceptions to standard dose rules, define the number of days between doses for each immunization, and define the number of days for dose exemptions so that Chancery SMS automatically sets the exemption expiry date. You can also specify the number of days before a student is of age that an immunization dose can be given and still be counted as valid.

In addition, you can set up compliance rules for students for health examinations. Chancery SMS checks the students’ birthdates, current age, or grade level to determine which examinations the student should receive.

Information for Users of Health in Pre-6.7 Versions

Following is information about the changes between pre- and post- 6.7 versions of Chancery SMS.

What Happens at Installation

When you install Chancery SMS 6.7, all student statuses (i.e., Compliant or Not Compliant) are cleared. Existing immunization dose information is maintained and, after you create your new immunization and examination rules using the new rule structure, all students are re-evaluated against the new structure and assigned a new status.

Nightly Task Changes

The nightly task that calculates compliance is modified to calculate only:

- When a change occurs (e.g., if a student’s age changes).
- When the next dose due date for a dose has passed.
- If a rule is changed.

Report Change

With the new Health Tracking design, the Immunization Requirements Detail Report is obsolete and is removed from the reports package

Updated Setup Lists for Health Tracking

Health Tracking setup lists have been updated for Chancery SMS 6.7 and higher as follows:

Setup List prior to 6.7	is now
Health Immunization Dose Action and Health Immunization Exemption **NOTE** If you have different list items in each of these setup lists, you will need to add each list item manually to the new setup list.	**Health Immunization Exemptions** Only one setup list is required, as you can now only enter exemptions at the immunization level, not the dose level. **NOTE** The pre-6.7 version of this setup list contained two additional list items: • Administered • Incorrectly Administered In Chancery SMS 6.7, these list items are not in this setup list and you do not need to add them as they are not applicable in version 6.7.
Health Immunization Modification Reason	**Health Dose Due Date Override Reason** **NOTE** As part of the system conversion, setup list items are copied from the previous to the new setup list, then the previous list items are deleted.
Health Immunization Non-Scheduled Immunization Type	**Health Immunization Name**
Immunization Dose Modification	removed
Immunization Action	removed
Immunization Dose Action	removed
Immunization Dose Name	removed

For information about working with setup lists, see the *Chancery SMS District Administration Guide*.

Setting Up Health Tracking at the District

Use Chancery SMS to manage and report on information concerning students' emotional and physical health. Based on district-defined rules about when students require immunizations or examinations, you can report on students who are delinquent (overdue) or who require immunizations or examinations in the near future so an appointment can be scheduled.

To monitor student health, complete the following general steps:

1. At the district, update Student Health setup list items. For more information about setup lists, see the *Chancery SMS District Administration Guide*. For information about updated setup lists for Health Tracking, see "Updated Setup Lists for Health Tracking" on page 6.
2. At the district, set up provisional enrollment to specify when students are assigned the provisional enrollment status. For more information, see "Setting up Provisional Enrollment" on page 9.
3. At the district, set up an automatic calculation of immunization exemption expiry dates. For more information, see "Defining Default Immunization Exemption Expiry Dates" on page 10.
4. At the district, indicate if early administration compliance is allowed by defining a grace period. For more information, see "Entering Immunization Preferences" on page 11.
5. At the district, set up immunization rules to specify which immunizations are required and when they must be administered. For more information about defining immunization rules, see "Setting Up Immunization Rules" on page 13.
6. At the district, set up health examination recommendations and requirements to specify which health examinations are required and when students need to have them. For more information about health examinations, see "Setting up Health Examinations" on page 18.
7. At the school, enter student health information. For more information about entering student health information, see "Health Tracking at the School" on page 21.

About Health Professional Roles in Chancery SMS

Chancery SMS includes two Base Roles for Health Tracking that can be used to create roles for health professionals:

- The District Health Professional role has default permissions to set up provisional enrollment, immunizations, health examinations, and screenings, as well as to view student health information and generate health reports.
- The School Health Professional role has default permissions to enter and view student health information, enter exemptions, and generate health reports, as well as to receive immunization and health examination alerts for students at their school.

Health Tracking Permissions

To work with Student Health Tracking, you need the following permissions:

To	You need this permission	Set to
Access the **Immunization Dose Quick Entry** link from the **Enrollment Steps** page	District > Enrollment Dose Quick Entry	Yes
Define requirements and recommendations for health examinations	District > Health Examination Rule	Delete or Edit
Enter an exemption for a particular immunization	District > Health Immunization Exemption	Yes
Override an incorrectly administered dose - change it from not compliant to compliant	District > Health Override Incorrectly Administered	Yes
Override the next dose due date for an immunization	District > Health Override Next Dose Due	Yes
Set up or change the provisional enrollment, and define immunization or examination compliance rules	District > Health Preferences	Delete
Define required immunizations and create dose rules	District > Immunization Setup	Delete
Add, edit, or delete student dental screening records	Students > Dental Screenings	Delete
Add, edit, or delete student hearing screening records	Students > Hearing Screenings	Delete
Add, edit, or delete social/emotional screening records	Students > Soc/Emotional Screenings	Delete
Access the **Dose Quick Entry** page	Students > Student Dose Quick Entry	Yes
Add, edit, or delete student health condition records	Students > Student Health Conditions	Delete
Add, edit, or delete student examination records	Students > Student Health Examinations	Delete
Add, edit, or delete student immunization records	Students > Student Health Immunizations	Delete
Add, edit, or delete student health medication records	Students > Student Health Medication	Delete
Add, edit, or delete health office visits	Students > Student Health Office	Delete
Add, edit, or delete student pregnancy records	Students > Student Health Pregnancy	Delete
Add, edit, or delete student health profile information	Students > Student Health Profile	Delete
Add, edit, or delete student vision screening records	Students > Vision Screenings	Delete

Setting up Provisional Enrollment

The provisional enrollment status is used to detect and control students who have not fulfilled all immunization or health examination requirements. If a student has not complied with the immunization requirements defined through the immunization rules or with health examination requirements or recommendations, the student is assigned a provisional enrollment status. If the student does not receive the required immunization or examination within the time allowed for the provisional enrollment grace period, they are considered non-compliant and can be removed from the school.

When a student is assigned a provisional enrollment status, an alert is sent to the school secretary and the school health professional at the student's home school. Depending on whether the student is delinquent in their immunizations or health examinations, Chancery SMS sends either the **Immunization Non-Compliance** alert or the **Health Examination Non-Compliance** alert. You define the frequency that these alert messages are sent to recipients when you set up provisional enrollment.

The School Administrator can change the alert configuration and message, as required. For more information, see "Setting Up Alerts" in the *Chancery SMS School Setup Guide*.

Health alerts are only sent to users with roles based on the **School Secretary** or **School Health Professional** base roles. If a user without either of these roles wants to receive health alerts, you must create a role based on one of these roles and assign it to the user. For more information about roles, see "Managing Roles and Users" in the *Chancery SMS District Administration Guide*.

Chancery SMS calculates provisional enrollment status for immunizations based on the following criteria:

- The student has not completed the immunization requirements on the day an immunization is overdue or on the first day of the school year, whichever is later.
- The student has exceeded the number of days in which they were to complete the immunization.

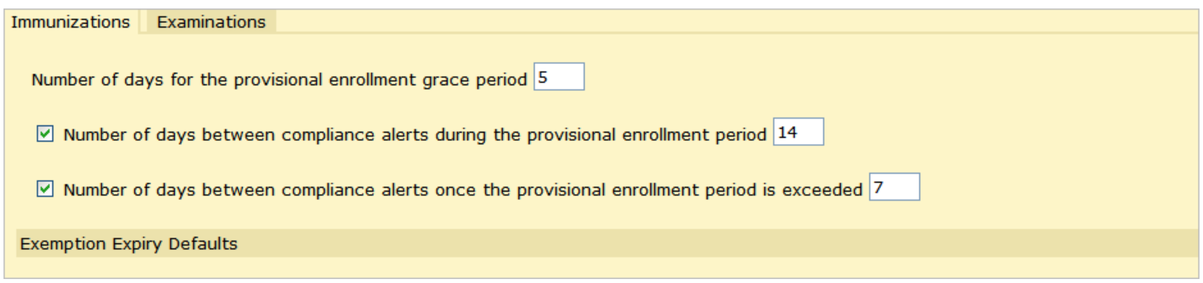
You can override a provisional enrollment status for immunizations or examinations by adjusting the **Provisional Enrollment Grace Period** date for individual students.

To set up provisional enrollment:

1. Log on as a district administrator.
2. In the control bar, under **Admin**, click **District Setup**.
3. On the **District Setup** page, under **Manage Health**, click **Preferences**.

4 On the **Preferences** page, on the **Immunizations** tab or **Examinations** tab, enter the following information, as required.

Field	Description
Number of days for provisional enrollment grace period	Enter the number of days the student can be non-compliant with an immunization or examination rule before they are assigned a provisional enrollment status. The provisional enrollment grace period begins on the day an immunization is overdue or on the first day of the school year, whichever is later.
Number of days between compliance alerts during the provisional enrollment period	Select this checkbox and enter a number of days to specify the frequency that alerts are sent to the school health professional and school nurse when a student has not complied with an immunization or examination rule. The alert must be turned on using the **Edit Alert** page.
Number of days between compliance alerts once the provisional enrollment period is exceeded	Select this checkbox and enter a number of days to specify the frequency that alerts are sent after a student has exceeded the provisional enrollment period.



5 Click **OK**.

Specifying Immunization Defaults and Preferences

You can set up the automatic calculation of default immunization exemption expiry dates, define a grace period for early administration compliance, and enable a link to the Dose **Quick Entry** page on the **Enrollment Steps** page.

Defining Default Immunization Exemption Expiry Dates

Set up an automatic calculation of dose exemption expiry dates by defining the number of days from the date of the original exemption. This calculated date is used if an immunization exemption expiry date is not entered on a student's record.

To define default immunization exemption expiry dates:

1 Log on as a district administrator.

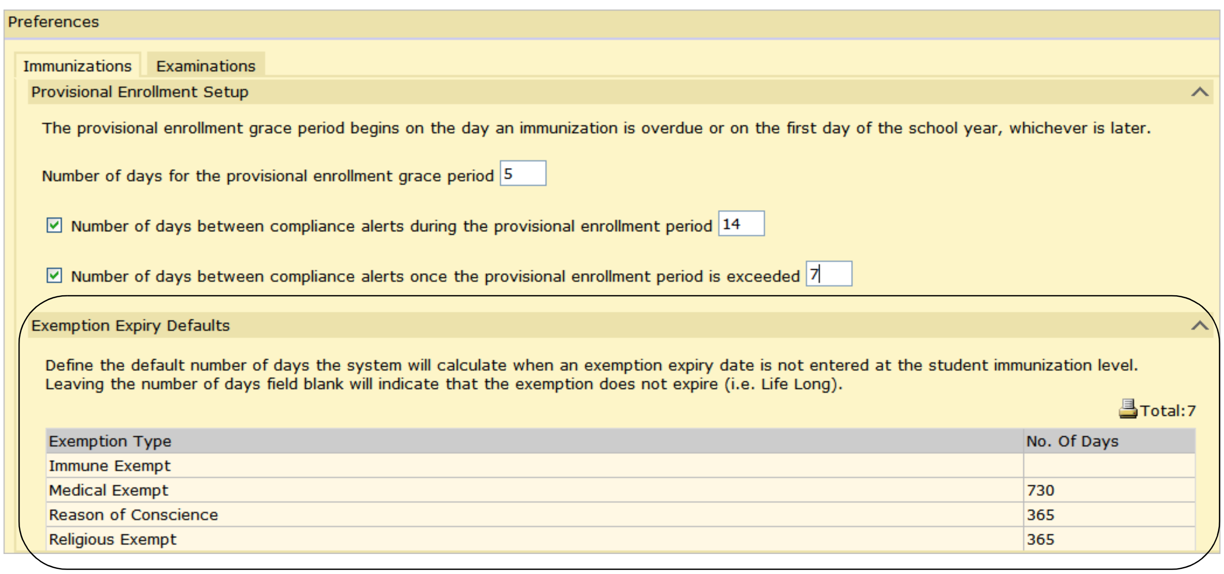
2 In the control bar, under **Admin**, click **District Setup**.

3 On the **District Setup** page, under **Manage Health**, click **Preferences**.

4 On the **Preferences** page, under the **Immunizations** tab, in the **Exemption Expiry Defaults** panel, enter the following information as required:

Field	Description
Exemption	Displays the name of the exemption type.
# days	Enter the number of days from the date of the original exemption. If an immunization exemption expiry is not entered on a student record, Chancery SMS will calculate the expiry date by referencing the original expiry date and subtracting the number of days you enter here.

NOTE
If there are no days defined in the **Exemption Expiry Defaults** panel, and no exemption expiry date on a student's record, Chancery SMS considers the student permanently exempt from the immunization.



5 Click **OK**.

Entering Immunization Preferences

You can set an early administration compliance option and indicate whether to display a link to the **Dose Quick Entry** page on the **Enrollment Steps** page.

To define immunization preferences:

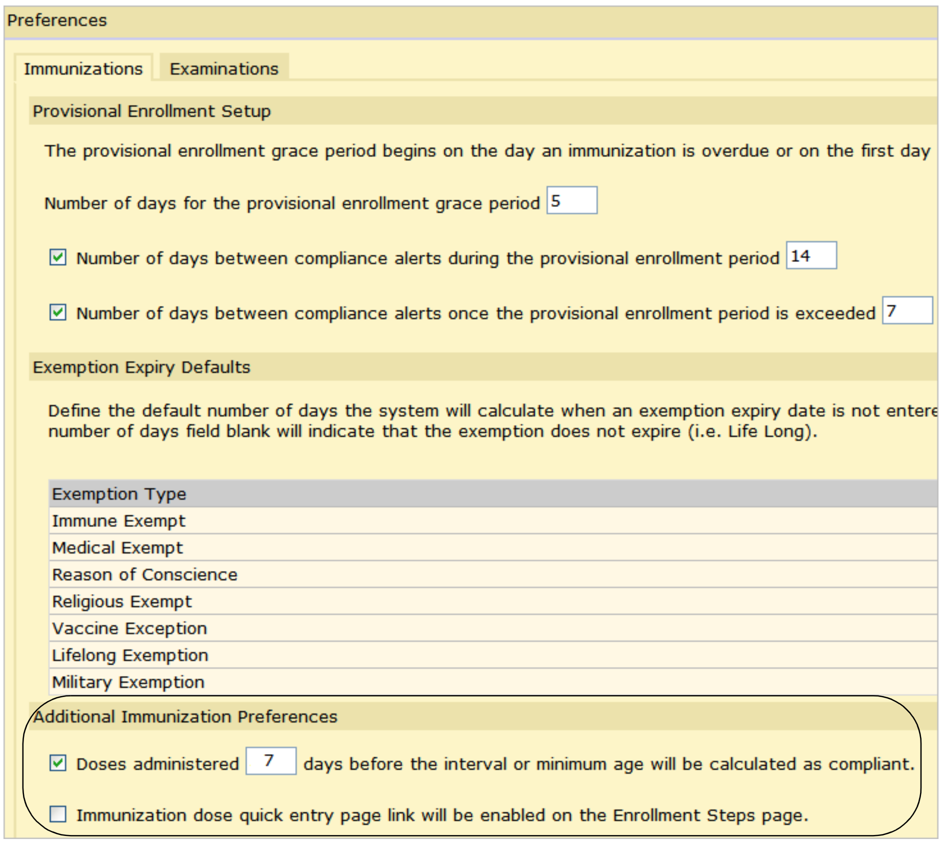
1 Log on as a district administrator.

2 In the control bar, under **Admin**, click **District Setup**.

3 On the **District Setup** page, under **Manage Health**, click **Preferences**.

4 To allow early administration compliance, under the **Immunizations** tab, in the **Additional Immunization Preferences** panel, select the checkbox for **Doses administered ____ days before the interval or minimum age will be calculated as compliant** and enter the number of days allowed prior to the minimum age or prior to the next immunization.

5 To have the link to the **Dose Quick Entry** page display on the **Enrollment Steps** page, click the checkbox for **Immunization dose quick entry page link will be enabled on the Enrollment Steps page**.



6 Click **OK**.

Setting Up Immunization Rules

Immunizations include any type of medication provided to students to ward against infection by common viruses and other diseases.

Immunizations can be “required” or “recommended”. If an immunization is required, rules must be defined. Immunization rules specify when students are required to fulfill immunization requirements.

A Chancery SMS nightly task calculates student immunization compliance. When a change occurs, such as a student’s age changes, the next dose due date for an immunization has passed, or a rule is changed, the nightly task recalculates compliance. Students who do not comply with the immunization rules are assigned a provisional enrollment status and an alert is sent to the appropriate user at the student’s home school.

Before you set up immunization rules, make sure the immunization setup lists contain the list items required. For more information about setup lists, see “Setup Lists and Setup List Pairs” in the *Chancery SMS District Administration Guide*. For information about setup lists for Health Tracking, see “Setting up Provisional Enrollment” on page 9.

Adding and Editing Immunizations

When you add an immunization, you enter a name and description of the immunization and indicate whether it is required. If the immunization is required, enter the requirements.

To add or edit an immunization:

1 Log on as a district administrator.

2 In the control bar, under **Admin**, click **District Setup**.

3 On the **District Setup** page, under **Manage Health**, click **Immunization Setup**.

4 On the **Immunization Setup** page, do one of the following:

To	Do this
Add an immunization	• From the **Actions** menu, click **Add Immunization**.
Edit an immunization	• Click the immunization name.
Delete an immunization	1 Select the immunization you want to delete. 2 From the **Actions** menu, click **Delete Immunization**. 3 Skip the remaining steps.

5 If you chose to add or edit an immunization, the **Immunization Details** page opens. Enter the following information:

Field	Description
Code	Enter the local code for the immunization.
Description	Enter the local description of the immunization.
State Code	Enter the state code for the immunization.
State Description	Enter the state description of the immunization.

Field	Description
Required	If this is a required immunization, select this checkbox. When you select the Required checkbox, the **Dose Administrator Rules** panel opens. For information about using this panel, see "Setting Up Immunization Requirements" on page 14.

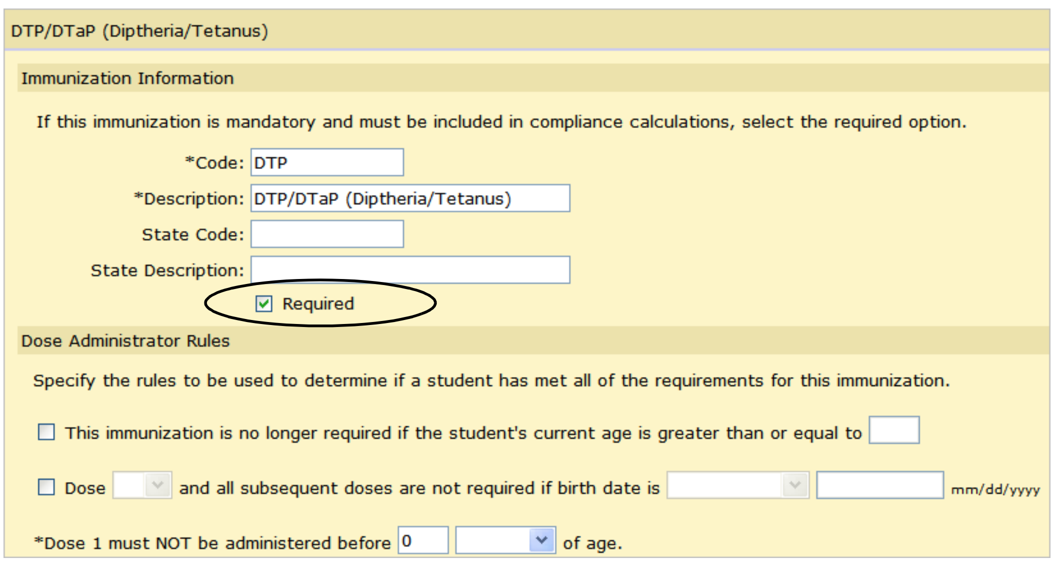
6 Click **Save & Add** to save the data and open a new **Add/Edit Immunization** page.

OR

Click **OK** to close the page.

Setting Up Immunization Requirements

When you select the **Required** checkbox on the **Add/Edit Immunization** page, the **Dose Administrator Rules** panel opens, which enables you to specify the rules to be used to determine if a student has met all the requirements for the immunization.



NOTE

If, at a later time, you want to make an immunization recommended rather than required, you can do so by deselecting the **Required** checkbox on the **Immunization Details** page. The dose administration rules you created will be hidden, but not deleted, on the student **Immunizations** page **Required** tab and visible on the student Immunizations page **Recommended** tab. Later, if you want to make this immunization required again, simply select the **Required** checkbox and your dose rules will reappear on the student Immunizations page **Required** tab and disappear from the student **Immunizations** page **Recommended** tab.

To set up immunization requirements:

1 Log on as a district administrator.

2 In the control bar, under **Admin**, click **District Setup**.

3. On the **District Setup** page, under **Manage Health**, click **Immunization Setup**.
4. On the **Immunization Setup** page, click the link for the immunization.
5. On the **Add/Edit Immunization** page, select the **Required** checkbox.
6. If the immunization is not required after a specific age, select **This immunization is no longer required if the student's current age is greater than or equal to _____** and enter the appropriate age.
7. If a specific immunization dose and any subsequent doses are not required if a student was born before or after a specified date (i.e., grandfathered against an immunization dose) select **Dose and all subsequent doses are not required if birth date is _____** and enter the applicable birth date.
8. For **Dose 1 must NOT be administered before ____ ____ of age**, enter the minimum age at which the dose can be given.
9. Click **Save & Add** to save the data and open a new **Add/Edit Immunization** page.

   OR

   Click **OK** to close the page.

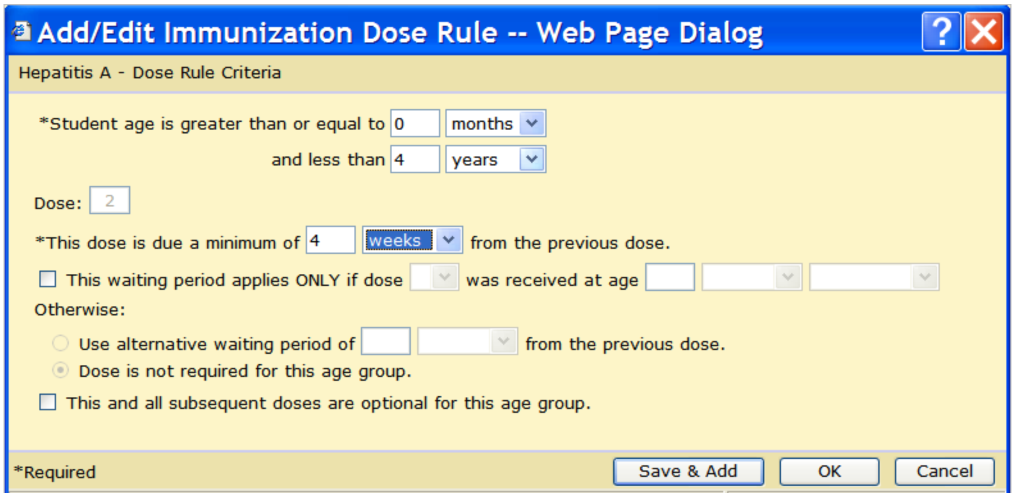
Creating Dose Administration Rules

When an immunization is required, create a dose administration rule. Dose administration rules are based on students' ages and help you determine when immunization doses are required. When you create a dose rule, you specify the age range to which the rule applies. To determine when (or if) a dose is necessary, the dose administration calculation looks at the student's current age and looks at the rules for the student's current age range, then calculates the due date for the dose.

To define dose administration rules:

1. Log on as a district administrator.
2. In the control bar, under **Admin**, click **District Setup**.
3. On the **District Setup** page, under **Manage Health**, click **Immunization Setup**.
4. On the **Immunization Setup** page, click the link for the immunization.

5 On the **Add/Edit Immunization** page, from the **Actions** menu, click **Add Immunization Dose Rule**.



6 In the **Add/Edit Immunization Dose Rule** dialog, complete the following fields:

Field	Description
Student age is greater than or equal to ____ ____ and less than ____ ____ of age.	Enter the student age parameters for this dose. This immunization dose will only be applicable to students in the age group you enter here. If you modify the student age for the dose, the dose number will be reset (if applicable), for the new age. **NOTE** When entering multiple dose rules, ensure the age groups you enter do not overlap.
Dose	This field displays the dose number. **NOTE** If this is the first dose you have created for this immunization, the number "2" displays in this field because dose 1 was created when you set up your dose administration rules on the **Add/Edit Immunization** page.
This dose is due a minimum of ____ ____ from the previous dose	Enter the interval required between this dose and the previous dose. This is the "waiting period".
This waiting period applies ONLY if dose ____ was received at ____ ____	If the waiting period for this dose applies only if a previous dose was received as of a certain age, select this checkbox box and enter the dose number and age information.
Use alternative waiting period of ____ ____ from the previous dose	If the waiting period does not apply to this dose, select this checkbox and enter the alternative waiting period information.

Field	Description
Dose is not yet required for this age group	If a dose is not required for this age group, select this checkbox.
This and all subsequent doses are optional for this age group	If this dose and all the following doses are optional for this age group, select this checkbox.

7 Click **Save & Add** to save the data and add a new **Immunization Dose Rule**.

OR

Click **OK** to save the data and close the dialog.

8 On the **Add/Edit Immunization** page, click **OK**.

Copying Immunization Rules

If you need to set up multiple immunizations that have the same rules, copy the immunization rules from one immunization to another. You can also copy rules that have the same rule structure and then just make any necessary adjustments.

To copy immunization rules, first create a “target” immunization record i.e., the immunization record to which you want to copy the immunization rules. When this record is created, open the immunization you want to copy from and copy the information to the target immunization record.

NOTE
A copied rule replaces *any* rules that have been defined previously for the target immunization.

To copy immunization rules:

1 Log on as a district administrator.

2 In the control bar, under **Admin**, click **District Setup**.

3 On the **District Setup** page, under **Manage Health**, click **Immunization Setup**.

4 On the **Immunization Setup** page, from the **Actions** menu, click **Add Immunization**.

5 On the **Add/Edit Immunization** page, complete the fields and ensure the **Required** checkbox is selected.

6 Navigate to the **Add/Edit Immunization** page for the immunization that contains the rules you want to copy and, from the **Actions** menu, click **Copy Immunization Rules**.

7 In the **Copy Immunization Rules** dialog, select the immunization you created in step 5.

Changing the Display Order of Immunizations

You can change the order in which immunizations appear on the **Quick Entry** page and the student **Immunizations** page. (For information about these pages, see “Health Tracking at the School” on page 21.)

To change the display order of immunizations:

1 On the **Immunization Setup** page, from the **Actions** menu, click **Change Order**.

2 In the **Change Order** dialog, select the immunization you want to move.

3 Use the up or down arrow to reposition the immunization in the list.

4 Click **OK**.

Setting up Health Examinations

Create compliance rules for students to have health examinations. Chancery SMS checks the students' birthdates, current age, or grade level to determine which examinations the student should have received. For example, you may want to create rules for the following types of health examinations:

- Standard
- Athletic
- Nutrition screening
- Lead screening
- TB screening

Adding Health Examination Rules

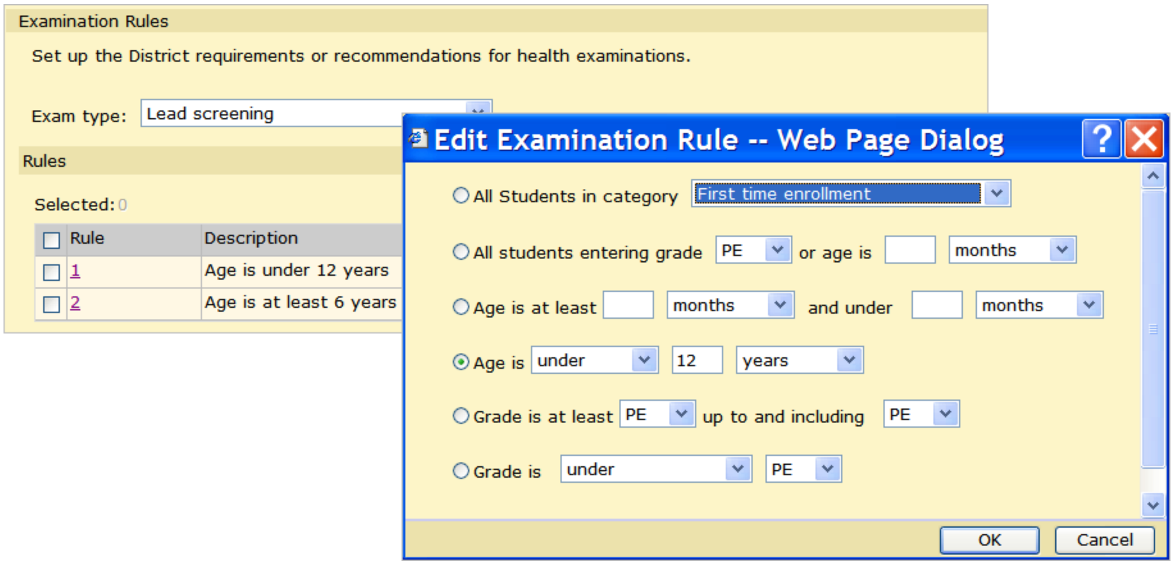
Before you set up health examination requirements and recommendations, make sure you create the health examination setup lists. For more information about setup lists, see the *Chancery SMS District Administration Guide*.

To add a health examination rule:

1. Log on as a district administrator.
2. In the control bar, under **Admin**, click **District Setup**.
3. On the **District Setup** page, under **Manage Health**, click **Examination Setup**.
4. On the **Examination Rules** page, from the **Exam Type** dropdown, select the type of health examination for which you want to define requirements and recommendations.
5. In the **Rules** panel, do one of the following:

To	Do this
Add a health examination rule	• From the **Actions** menu, click **Add Rule**.
Edit a health examination rule	• Click the rule number.
Delete a health examination rule	1 Select the rule you want to delete. 2 From the **Actions** menu, click **Delete Rule**. Skip the remaining steps.

6 If you are adding or editing a health examination rule, the **Add/Edit Examination Rule** dialog appears.



7 In the **Add/Edit Examination Rule** dialog, choose one of the following and enter or select the appropriate information:

- **All Students in category___**
- **All students entering grade <grade level> or age is ___ months/years**
- **Age is at least ___ months/years and under ___ months/years**
- **Age is under/at least ___ months/years**
- **Grade is at least <grade level> up to and including <grade level>**
- **Grade is under/at least <grade level>**

8 Click **OK**.

Health Tracking at the School

Use Chancery SMS to work with data concerning students' physical and emotional health. You can track students' compliance for immunizations and examinations, and work with information about their health conditions, medications prescribed, pregnancies, and vision, hearing, dental, and social/emotional screenings.

Working with Student Health Profile Information

The student's health profile is an overview of the student's health status. The **Health Profile** page contains the student's health formation and enables you to add and edit information about the student's health providers, medical releases, immunization and examination status, and health insurance.

To add or edit a student's health profile:

1 Log on as a school health professional or school administrator.

2 Search for and open a student record.

3 On the **Student Demographics** page, in the control bar, click **Health Tracking**.

4 On the **Health Profile** page, review, enter, or edit the following information:

Field	Description
Contact Information	
Emergency Contact	Displays the student's emergency contact.
Emergency Phone	Displays the phone number for the student's emergency contact.
Doctor Name	Displays the name of the student's doctor.
Doctor Phone	Displays the phone number for the student's doctor.
Medical Number	Displays the student's medical number.
Dentist Name	Enter the name of the student's dentist.
Dentist Phone Number	Enter the phone number for the student's dentist.
Medical Release Information	
Medical Release on File	If the school has a medical release form on file, select this checkbox.
Release Effective Date	Enter the date the medical release form became effective.
Release Expiry Date	Enter the date the medical release form expires. The default date is one year from the date in the **Release Effective Date** field.

Field	Description
Status Information	
Immunization Status	Indicates whether or not the student has complied with all required immunizations. Chancery SMS determines the immunization status based on the immunization rules defined at the district and on the student's immunization records. Immunization compliance is calculated during the nightly compliance calculation task. Possible status: • **Compliant** - the student has either received all required immunizations, has had the disease, has a waiver, or is on schedule with all immunizations. • **Not compliant** - the student requires one or more immunizations.
Examination Status	Indicates whether or not the student has complied with all required examinations. This status is based on the information specified for each required examination on the **Examinations > Exam Category > Exam Details** page. Examination compliance is calculated during the nightly compliance calculation task. Possible status: • **Compliant** - the student has received all required health examinations or is on schedule with all health examinations. • **Not compliant** - the student requires one or more health examinations. • **Compliant (no examinations entered)** - the student does not require one or more health examinations.
Provisionally Enrolled	Indicates whether or not the student is provisionally enrolled. Chancery SMS automatically assigns the provisionally enrolled status when students do not meet all immunization requirements within the allotted time or when the **Compliant** checkbox is deselected on the student's **Examinations** page (i.e., set to not compliant for any examination).
Prov. Enroll End Date	Displays the date the student's status changed to **Provisionally Enrolled**.
Prov. Enroll Override	To override the student's provisional enrollment status, select this checkbox.
Extend Prov. Enroll Date	If **Prov. Enroll Override** is selected, enter a new provisional enrollment end date to extend the provisional enrollment grace period.
Override Comments	If **Prov. Enroll Override** is selected, enter additional details about the provisional enrollment override.

5 If an insurance information record has been created, the following information appears in the **Insurance Information** panel and is editable:

Field	Description
Insurance Provider	Displays the name of the student's health insurance provider.
Insurance No.	Displays the student's health insurance number.
Group No.	Displays the student's health insurance group number.

To add an **Insurance Information** record, see "Adding and Editing Student Health Insurance Information" on page 23.

6 Click **Apply** to save the data and remain on the page.

OR

Click **OK** to save the data and close the page.

Adding and Editing Student Health Insurance Information

1 Log on as a school health professional or school administrator.

2 Search for and open a student record.

3 On the **Student Demographics** page, in the control bar, click **Health Tracking**.

4 On the **Health Profile** page, do any of the following:

To	Do this
Add an insurance information record	• From the **Actions** menu, click **Add Insurance Information**. OR In the **Insurance Information** panel, enter the information.
Edit an insurance information record	1 Select the insurance information record. 2 From the **Actions** menu, click **Edit Insurance Information**. OR Click the link for the insurance information record.
Delete an insurance record	1 Select the insurance information record. 2 From the **Actions** menu, click **Delete Insurance Information**. 3 Click **OK** and skip the remaining steps.

5 On the **Insurance Information** page or in the **Insurance Information** panel, enter the following information:

Field	Description
Insurance Provider	Enter the name of the student's health insurance provider.
Insurance No.	Enter the student's health insurance number.
Group No.	Enter the student's health insurance group number.

6 Click **OK**.

7 On the **Health Profile** page, click **Apply** to save the data and remain on the page.

OR

Click **OK** to save the data and close the page.

Working with Immunization Records

Students' immunization records are used to determine if students have complied with the district-defined immunization rules.

Immunizations are of two types: required and recommended. If an immunization is required, rules are created by your district that specify when students must fulfill immunization requirements. If students do not comply with the requirements within the allotted time, Chancery SMS assigns them a **Provisional Enrollment** status.

NOTE
When Chancery SMS assigns a student a **Provisional Enrollment** status, an alert is automatically sent to the school health professional and the school secretary. If you do not have one of these roles and want to receive immunization alerts, contact your district administrator.

Immunization compliance is calculated through a nightly compliance calculation task. A student is assigned a status of **Compliant** for an immunization if the student is one or more the following:

- Is exempt.
- Has received all of the applicable doses.
- Has received an override.
- Is on schedule with their immunization doses.

Entering Historical Immunization Doses

The **Dose Quick Entry** page enables you to quickly enter historical immunization doses for a student. For example, use this page to enter immunization doses for a new student enrolling in your school.

Chancery SMS calculates the compliance status for the student when you save the **Dose Quick Entry** page.

NOTE
For each immunization, you must enter dose administration dates chronologically from left to right (i.e., the date of Dose 1 before the Dose 2 date, the date of Dose 2 before the Dose 3 date, etc.). Each dose administration date must be different for a given immunization.

To enter historical immunization doses:

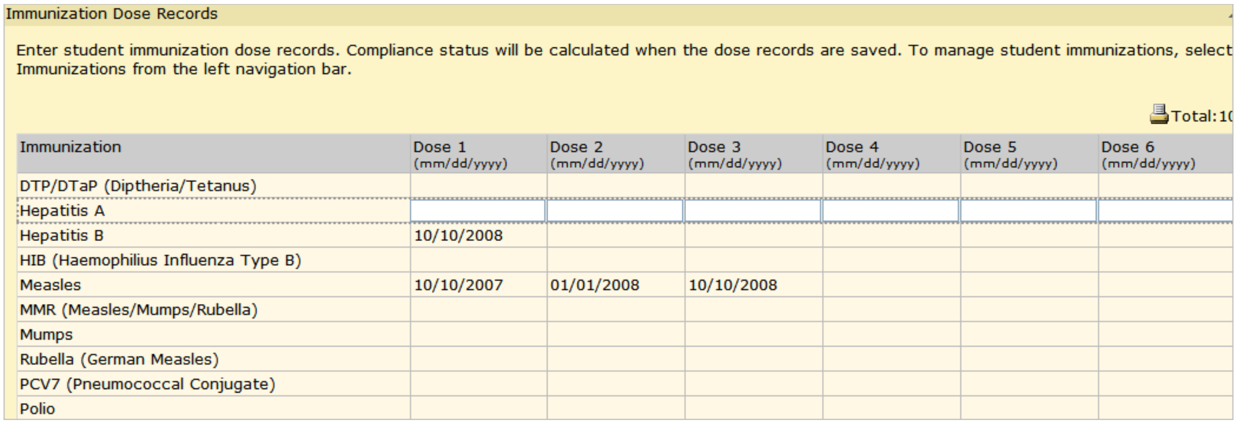
1 Log on as a school health professional or school administrator.

2 Search for and open a student record.

3 On the **Student Demographics** page, in the control bar, click **Health Tracking**.

4 On the **Health Tracking** page, in the control bar, click **Dose Quick Entry**.

5 On the **Dose Quick Entry** page, enter the date for each dose given for each immunization.



Immunization Dose Records

Enter student immunization dose records. Compliance status will be calculated when the dose records are saved. To manage student immunizations, select Immunizations from the left navigation bar.

Total: 1(

Immunization	Dose 1 (mm/dd/yyyy)	Dose 2 (mm/dd/yyyy)	Dose 3 (mm/dd/yyyy)	Dose 4 (mm/dd/yyyy)	Dose 5 (mm/dd/yyyy)	Dose 6 (mm/dd/yyyy)
DTP/DTaP (Diptheria/Tetanus)						
Hepatitis A						
Hepatitis B	10/10/2008					
HIB (Haemophilius Influenza Type B)						
Measles	10/10/2007	01/01/2008	10/10/2008			
MMR (Measles/Mumps/Rubella)						
Mumps						
Rubella (German Measles)						
PCV7 (Pneumococcal Conjugate)						
Polio						

6 Click **Apply** to save the data and remain on the page.

OR

Click **OK** to save the data and close the page.

NOTE
You can also access the **Dose Quick Entry** page from the **Actions** menu on the **Student Search Results** page and from the **Registration/Enrollment Steps** page, provided you have the required permissions. For information about your permissions, contact your district administrator.

Updating Required Immunization Doses

The **Immunizations** page contains two tabs: **Required** and **Recommended**. The **Required** tab displays the required immunizations in the order pre-defined by the district. For each immunization dose, the dose number and next dose due date are displayed. The dose due date is calculated based on the previously administered dose administered date. If a dose is overdue, the word "**Now**" is displayed, along with the **Not Compliant** indicator.

Also displayed is the student's compliance status, either **Compliant** or **Not Compliant**. Immunization compliance is calculated during the nightly compliance calculation task. If the student is compliant, an explanation of why the student is compliant is displayed.

For information about the **Recommended** tab, see "Adding and Editing Recommended Immunizations" on page 29.

To update a required immunization:

1 Log on as a school health professional or school administrator.

2 Search for and open a student record.

3 On the **Student Demographics** page, in the control bar, click **Health Tracking**.

4 On the **Health Profile** page, in the control bar, click **Immunizations**.

The **Required** tab displays required immunizations in the order pre-defined by the district.

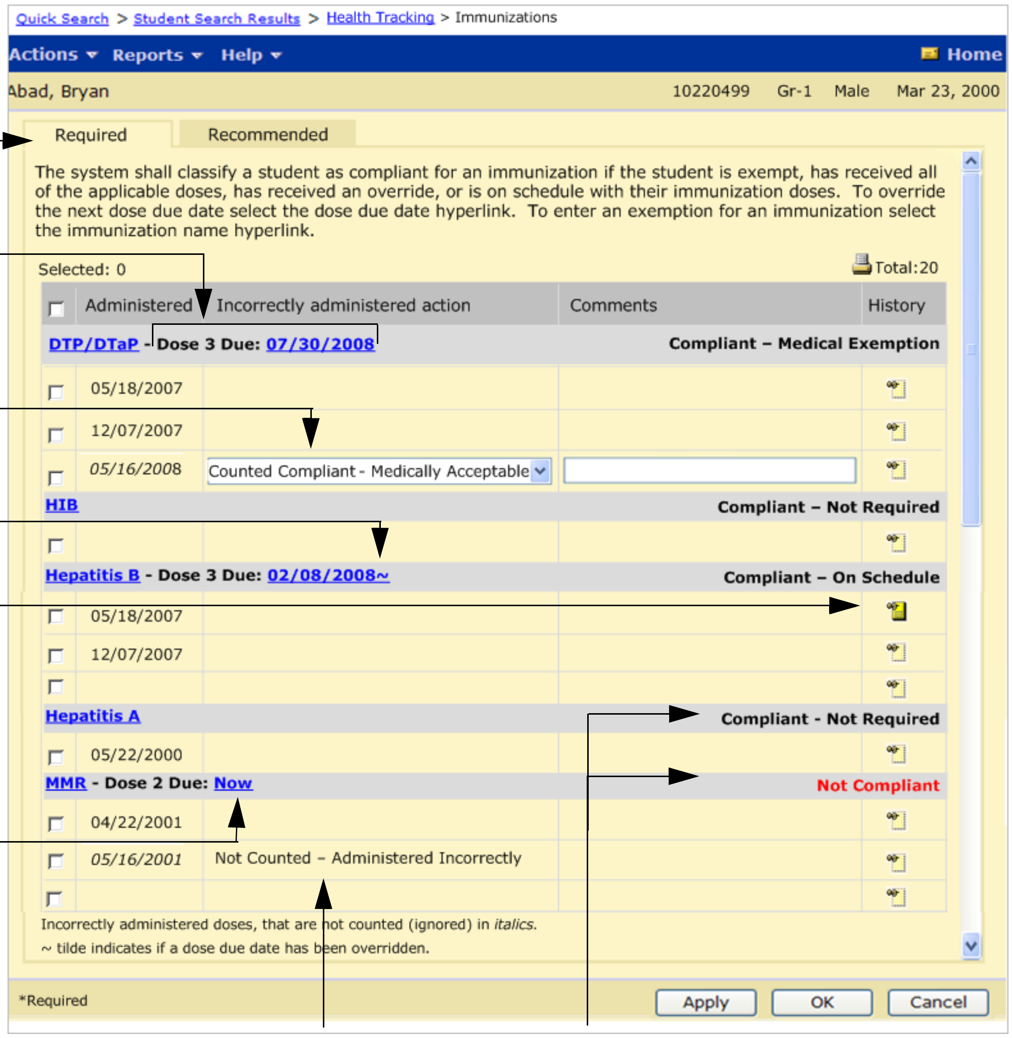
For each immunization dose, the dose number and next dose due date are displayed.

To have an incorrectly administered dose count toward compliance, select from the dropdown.

A ~ (tilde) appears beside overridden dose dates. To view the override, click the date link.

To view an override for a previous dose, click the note icon.

If a dose is overdue, the word "**Now**" appears beside the dose number.



If a dose was administered too soon, Chancery SMS displays this message.

The student's compliance status appears beside the immunization.

5 Enter or update the following information for each immunization dose:

Column	Description
Administered	Click in the field below the immunization name and enter the date the dose was administered. **NOTE** The **Dose Due Date** is calculated based on the administered date of the previous dose.
Incorrectly Administered Action	If the dose was administered too soon, Chancery SMS displays **Not Counted - Administered Incorrectly** in this column. If you would like the dose to be counted towards compliance, and you have the correct permissions, click in field below the immunization and select **Counted Compliant - Medically Acceptable** from the dropdown. The dose will be counted as a valid dose the next time compliance is calculated. **NOTE** If you do not have permission to override incorrectly administered doses, the data in this field is not editable. For information about permissions, contact your district administrator.
Comments	Enter any additional information about the immunization dose.

6 Click **Apply** to save the data and remain on the page.

OR

Click **OK** to save the data and close the page.

Overriding a Dose Due Date for an Immunization

Chancery SMS calculates dose due dates for required immunizations based on district-defined rules, the date the last dose was administered, as well as the student's date of birth and grade level.

You can change the dose due date for a required immunization. For example, if a student's provisional enrollment grace period ends on January 22, but the vaccine is not available until February 1, you can extend the student's immunization dose due date to allow the student time to receive the immunization.

When you override a next dose due date for an immunization, a ~ (tilde) appears beside the due date and compliance is recalculated based on the new dose due date.

To override the dose due date for an immunization:

1 Log on as a school health professional or school administrator.

2 Search for and open a student record.

3 On the **Student Demographics** page, in the control bar, click **Health Tracking**.

4 On the **Health Profile** page, in the control bar, click **Immunizations**.

5 On the **Immunizations** page, beside the immunization dose you want to override, click the due date (if the dose is overdue, click **Now**).

6 On the **Override Dose Due Date** dialog, enter the following information:

Field	Description
Dose Due Date	Enter the date you want the dose to be administered. **NOTE** The dose due date cannot be in the past.
Reason for Override	Select a reason the dose due date was changed, e.g., In hospital, Vaccine not available, Scheduled for future date.
Override Date	Enter the date this override was created.
Comments	Enter any additional information about the change to the immunization due date.

NOTE
To view a historical override (i.e., a previous dose that was overridden), in the **History** column, click, or hover your mouse over, the enabled note icon. The **Override Dose Due Date** dialog opens for viewing only, the information is not editable.

7 Click **OK**.

8 On the **Immunizations** page, click **Apply** to save the data and remain on the page.

OR

Click **OK** to save the data and close the page.

Entering and Clearing Immunization Exemptions

If a student is exempt from an immunization for medical, religious, or other reasons, create an immunization exemption record. Later, if you need to clear the exemption, you can do so as long as the exemption is active. You cannot clear an expired exemption.

If your district has defined the default number of days before an immunization exemption expires, the exemption expiry date is automatically calculated. If your district has not defined the number of days until expiry, enter the expiry date. If no exemption expiry date is calculated or entered, Chancery SMS considers the exemption lifelong.

NOTE
If you want to enter or edit exemptions but do not have the correct permissions, contact your district administrator.

To enter an immunization exemption:

1 Log on as a school health professional or school administrator.

2 Search for and open a student record.

3 On the **Student Demographics** page, in the control bar, click **Health Tracking**.

4 On the **Health Profile** page, in the control bar, click **Immunizations**.

5 On the **Immunizations** page, click the link for the immunization you want to enter an exemption for.

6 In the **Immunization Exemption** dialog, complete the following:

Field	Description
Immunization Exemption	Select the reason for the immunization exemption.
Expiry Date	If your district has defined the default number of days for exemptions for this immunization, the exemption expiry date is automatically calculated. OR If your district has not defined the default number of days for exemptions, enter the date the exemption expires. **NOTE** If the expiry date is left blank, Chancery SMS considers the exemption lifelong.
Comments	Enter any additional information about the exemption.

7 Click **OK**.

To clear an immunization exemption:

1 Log on as a school health professional or school administrator.
2 Search for and open a student record.
3 On the **Student Demographics** page, in the control bar, click **Health Tracking**.
4 On the **Health Profile** page, in the control bar, click **Immunizations**.
5 On the **Immunizations** page, click the link for the immunization you want to clear the exemption for.
6 In the **Immunization Exemption** dialog, click **Clear Exemption**.
7 Click **Save**.

Adding and Editing Recommended Immunizations

Recommended immunizations are immunizations that are not mandated by the state or district. Recommended immunizations are not included in the compliance calculation and do not count toward students' immunization compliance.

To add or edit a recommended immunization:

1 Log on as a school health professional or school administrator.
2 Search for and open a student record.
3 On the **Student Demographics** page, in the control bar, click **Health Tracking**.
4 On the **Health Profile** page, in the control bar, click **Immunizations**.
5 On the **Immunization** page, click the **Recommended** tab.

6 On the **Recommended** tab, do one of the following:

To	Do this
Add a recommended immunization	Click **Add Rows**.
Edit a recommended immunization	In the field you want to edit, click the dropdown or enter your changes.
Delete a recommended immunization	1 Select the immunization you want to delete. 2 From the **Actions** menu, click **Delete Recommended Immunization**. 3 Skip the remaining steps. **NOTE** To delete a recommended immunization, you need the appropriate permissions. For information about permissions, contact your system administrator.

7 Complete the following information:

Field	Description
Immunization Name	Select the immunization from the dropdown. **NOTE** The list in the dropdown contains only recommended, and not required, immunizations.
Dose	Enter the immunization dose number (1-10).
Date Administered	Enter the date the immunization dose was administered.
Comments	Enter any additional information about the recommended dose.

8 Click **Apply** to save the data and remain on the page.

OR

Click **OK** to save the data and close the page.

Adding and Editing Health Examination Records

Enter information about the examinations students are required to have and record the status of each examination. In Chancery SMS, examinations are divided into categories; for example, **First time enrollment**, **Required for athletic program**, **Required for registration** and so on. For each category, there is a physical examination and one or more exam types, such as a blood glucose test, chest x-ray, and nutrition screening.

When students do not comply with the district examination requirements, they are given a provisional enrollment status.

NOTE
When students are assigned a **Provisional Enrollment** status, an alert is automatically sent to the school health professional and the school secretary. If you do not have one of these roles and you would like to receive immunization alerts, contact your district administrator.

To add or edit student health examination records:

1 Log on as a school health professional or school administrator.

2 Search for and open a student record.

3 On the **Student Demographics** page, in the control bar, click **Health Tracking**.

4 On the **Health Profile** page, in the control bar, click **Examinations**.

5 If an examination record has been created, the **Examinations** page displays the following information:

Field	Description
Exam Category	Displays the examination category, e.g., athletic program, first time enrollment, required for registration.
Exam Date	Displays the date the health examination was performed.
Examination Grade Level	Displays the student's grade level at the time of the examination.
Compliant	Displays whether the student has satisfied all requirements for the exam category.

6 On the **Examinations** page, do one of the following:

To	Do this
Add an examination	• From the **Actions** menu, click **Add Examinations**.
Edit an examination	1 Select the examination record. 2 From the **Actions** menu, click **Edit Examinations**. OR Click the link for the examination record.
Delete an examination	1 Select the examination you want to delete. 2 From the **Actions** menu, click **Delete Examination**. 3 Click **OK** and skip the remaining steps. **NOTE** To delete an examination, you need the appropriate permissions. For information about permissions, contact your system administrator.

7 On the **Exam Category** page, enter or edit the following information:

Field	Description
Exam Category	Select the type of the examination, e.g., athletic program, first time enrollment, required for registration.
Exam Date	Enter the date the examination was performed.
Examination Grade Level	Enter the student's grade level at the time of the examination.
Compliant	Select if the student has satisfied all requirements for the exam category.

Field	Description
Physical Examination	
Height (feet)	Enter the number of feet in the student's height. For example, if the student is 5'6" tall, enter 5.
Height (inches)	Enter the number of inches in the student's height. For example, if the student is 5'6" tall, enter 6.
Weight	Enter the student's weight in pounds.
Body Mass Index	Chancery SMS calculates the student's BMI based on height and weight using the following formula: $$\mathrm{BMI} = \left[\frac{\mathrm{WeightinPounds}}{(\mathrm{HeightinInches}) \times (\mathrm{HeightinInches})}\right] \times 703$$ For example, a person who weighs 220 pounds and is 6'3" tall has a BMI of 27.5. $$27.5 = \left[\frac{220}{75 \times 75}\right] \times 703$$
Pulse	Enter the student's pulse rate.
Blood Pressure	Enter the student's systolic/diastolic measurement.
Ability to Play Sports	Select whether the student can participate in sports, e.g., Yes - no accommodations, Yes - with accommodations, No.
Dietary Need/Restriction	Enter any dietary needs or restrictions.
Comments	Enter any additional information.

8 If examination details have been entered, the **Examinations** page displays the following information:

Field	Description
Examination Type	Displays the type of examination required, e.g., Lead Screening, TB Screening, Chest x-ray, body fat percentage, Blood/glucose test.
Date	Displays the date of the specific examination.
Result	Displays the test results, e.g., Pass, Negative, 15%.

To enter or edit examination details, see "Adding and Editing Examination Details" on page 33.

9 Click **Apply** to save the data and remain on the page.

OR

Click **OK** to save the data and close the page.

Adding and Editing Examination Details

1 Log on as a school health professional or school administrator.
2 Search for and open a student record.
3 On the **Student Demographics** page, in the control bar, click **Health Tracking**.
4 On the **Health Profile** page, in the control bar, click **Examinations**.
5 On the **Examinations** page, add or edit an examination (for instructions see "Adding and Editing Health Examination Records" on page 30).
6 On the **Examinations** page, do any of the following:

To	Do this
Add examination details	• From the **Actions** menu, click **Add Examination Details**.
Edit examination details	• Click the link in the **Exam Category** column.
Delete examination details	1 Select the insurance information record. 2 From the **Actions** menu, click **Delete Examination Details**. 3 Click **OK** and skip the remaining steps.

7 On the **Examination Details** page, enter or edit the following information:

Field	Description
Examination Type	Select the type of examination required, e.g., Lead Screening, TB Screening, Chest x-ray, body fat percentage, Blood/glucose test.
Date	Enter the date of the specific examination.
Result	Enter the test results, e.g., Pass, Negative, 15%.
Comments	Enter any additional information.

8 Click **OK**.
9 On the **Examinations** page, click **Apply** to save the data and remain on the page
OR
Click **OK** to save the data and close the page.

Adding and Editing Health Conditions

Track a student's health condition and allergy information, including whether the student is receiving treatment for the condition and the medication the student is taking.

To add and edit health conditions:

1 Log on as a school health professional or school administrator.
2 Search for and open a student record.
3 On the **Student Demographics** page, in the control bar, click **Health Tracking**.
4 On the **Health Profile** page, in the control bar, click **Conditions**.

5 If a health condition record has been created, the **Conditions** page displays the following information:

Field	Description
Condition	Displays the name of the medical condition.
Monitored	Indicates whether the condition is being monitored.
Receiving Treatment	Indicates whether the student is currently receiving medical treatment for the condition.
Last Visit	If the student is receiving medical treatment, displays the date of their last appointment.
Taking Medication	Indicates whether the student is taking medication.
Medical Alert	Indicates that there is a medical concern. . **NOTE** The **Medical Alert** icon does not define the student's medical condition; it simply indicates that there is a medical concern.

6 On the **Conditions** page, do one of the following:

To	Do this
Add a health condition	• From the **Actions** menu, click **Add Health Condition**.
Edit a health condition	**1** Select the health condition. **2** From the **Actions** menus, click **Edit Health Condition**.
Delete a health condition	**1** Select the health condition. **2** From the **Actions** menu, click **Delete Health Condition**. **3** Click **OK** and skip the remaining steps. **NOTE** To delete a health condition, you need the appropriate permissions. For information about permissions, contact your system administrator.

7 On the **Details** page, enter or edit the following information:

Field	Description
Condition	Select the name of the medical condition.
Monitored	If the condition is being monitored, select this checkbox.
Receiving Treatment	If the student is currently receiving medical treatment for the condition, select this checkbox.
Last Visit	If the student is receiving medical treatment, enter the date of their most recent appointment.
Taking Medication	If the student is taking medication for this condition, select this checkbox.
Medication Name	Enter the name of the medication.
Take Medication at Home	If the student takes medication at home, select this checkbox.

Field	Description
Take Medication at School	If the student takes medication at school, select this checkbox.
Medical Alert	Select whether an Alert icon is displayed on the **My Classes** page for teachers who have the student on their roster. **NOTE** The **Medical Alert** icon does not define the student's medical condition; it simply indicates that there is a medical concern.
Med. Regiment Compliant	Select whether the student follows their prescribed medical regiment.
Comments	Enter any additional information or comments about the condition.

8 Click **OK**.

9 On the **Conditions** page, click **Apply** to save the data and remain on the page

OR

Click **OK** to save the data and close the page.

Adding and Editing Medication Information

The **Medication** page enables you to view, enter, and edit information about a student's medication, such as dosage and how the medication is taken and how often.

To add and edit medication information:

1 Log on as a school health professional or school administrator.

2 Search for and open a student record.

3 On the **Student Demographics** page, in the control bar, click **Health Tracking**.

4 On the **Health Profile** page, in the control bar, click **Medications**.

5 If a medication tracking record has been created, the **Medication** page displays the following information:

Field	Description
Medication	Displays the name of the medication.
Prescribed dosage	Displays the dose to be administered.
Units	Describes the unit of measurement applicable to each prescribed dose.
Route Type	Displays the method used to dispense the medication; for example, oral, topical, injection.
Frequency	Displays how often the medication is administered.
Start Date	Displays when medication treatment begins.
End Date	Displays when medication treatment ends.

6 On the **Medications** page, do one of the following:

To	Do this
Add a medication	• From the **Actions** menu, click **Add Medication Tracking**.
Edit a medication	**1** Select the medication. **2** From the **Actions** menu, click **Edit Medication Tracking.** OR Click the link for the medication record.
Delete a medication	**1** Select the medication. **2** From the **Actions** menu, click **Delete Medication Tracking**. **3** Click **OK** and skip the remaining steps. **NOTE** To delete a medication, you need the appropriate permissions. For information about permissions, contact your system administrator.

7 On the **Tracking Details** page, enter or edit the following information:

Field	Description
Medication Tracking Details	
Medication	Enter the name of the medication.
Prescribed dosage	Enter the dose to be administered.
Units	Enter the unit of measurement applicable to each prescribed dose.
Route Type	Select the method used to administer the medication; for example, oral, topical, injection.
Frequency	Enter how often the medication is administered.
Start Date	Enter the date when medication treatment begins.
End Date	Enter the date when medication treatment ends.
Medication Expiry Date	Enter the date the medication expires.
Condition	Select the health condition the medication is for. If the condition does not appear in the list, specify the name of the condition in the **Specify, Other Condition** field.
Specify, Other Condition	If the condition does not appear in the list for the **Condition** field, enter the name of the condition.
Special Instructions	Enter any special instructions for administering the medication.
Comments	Enter any other details.
Authorization/Consent	
Parental Consent	If the parent consented to the medication being administered at school, select this checkbox.
Parent Authorization Date	Enter the date parental consent was received.

Field	Description
Authorization Valid Until	Enter the date the parental consent is no longer valid.
Doctor Authorization Date	Enter the date the doctor authorized the medication.
Authorization Valid Until	Enter the date the doctor’s authorization is no longer valid.

8 Click **OK**.

9 On the **Medication** page, click **Apply** to save the data and remain on the page

OR

Click **OK** to save the data and close the page.

Recording Health Office Visits

Enter information about student visits to the school's health office, including the type of visit, symptoms, treatments, and follow-up actions.

To record health office visits:

1 Log on as a school health professional or school administrator.

2 Search for and open a student record.

3 On the **Student Demographics** page, in the control bar, click **Health Tracking.**

4 On the **Health Profile** page, in the control bar, click **Health Office**.

5 If a health office visit record has been created, the **Health Office** page displays the following information:

Field	Description
Exam Date	Displays the date the student went to the health office.
Time In	Displays the time the student arrived at the health office.
Time Out	Displays the time the student left the health office.
Office Examiner	Displays the name of the person who examined the student at the health office.

6 On the **Health Office** page, do one of the following:

To	Do this
Add an office visit	• From the **Actions** menu, click **Add Health Office Visits**.
Edit an office visit	1 Select the office visit. 2 From the Actions menu, click **Edit Health Office Visits**. OR Click the link for the office visit record.
Delete an office visit	1 Select the office visit you want to delete. 2 From the **Actions** menu, click **Delete Health Office Visits**. 3 Click **OK** and skip the remaining steps. **NOTE** To delete an office visit, you need the appropriate permissions. For information about permissions, contact your system administrator.

7 On the **Office Visits** page, enter or edit the following information:

Field	Description
Health Office Visit Details	
Exam Date	Enter the date the student went to the health office.
Time In	Enter the time the student arrived at the health office.
Time Out	Enter the time the student left the health office.

Field	Description
Office Visit Type	Select the type of health office visit, such as illness, injury, medication administration.
Office Examiner	Select the person who examined the student at the health office.
Diagnosis/Treatment/Disposition	
Diagnosis	Select a diagnosis from the list, e.g., sore throat, cold, bump/bruise. The available diagnoses depends on the type of office visit selected.
Diagnosis Comments	Enter comments about the diagnosis.
Treatment	Select a treatment from the list, e.g., medication given, ice, rest. The available treatments depends on the type of office visit selected.
Treatment Comments	Enter additional information about the treatment.
Disposition	Select the final outcome of the health office visit from the list, e.g., return to class, sent home, remain in health office.
Disposition Comments	Enter any additional information about the disposition.

8. Click **OK**.
9. On the **Health Office** page, click **Apply** to save the data and remain on the page

   OR

   Click **OK** to save the data and close the page.

Working with Pregnancy Records

Use Chancery SMS to track student pregnancy information and outcomes.

To work with pregnancy records:

1. Log on as a school health professional or school administrator.
2. Search for and open a student record.
3. On the **Student Demographics** page, in the control bar, click **Health Tracking**.
4. On the **Health Profile** page, in the control bar, click **Pregnancy.**
5. If a pregnancy tracking record has been created, the **Pregnancy** page displays the following information:

Field	Description
Due Date	Displays the date the student is expected to give birth.
Leave Date	Displays the date the student is expected to start maternity leave and stop attending classes.
Return Date	Displays the date the student is expected to return to classes after their maternity leave ends.

Field	Description
Pregnancy Outcome	Displays the outcome of the pregnancy, e.g., full term, premature, still born, caesarian birth.
Birth Date	Displays the baby's date of birth.

6 On the **Pregnancy** page, do one of the following:

To	Do this
Add a pregnancy tracking record	• From the **Actions** menu, click **Add Pregnancy Tracking**.
Edit a pregnancy tracking record	1 Select the pregnancy tracking record. 2 From the **Actions** menu, click **Edit Pregnancy Tracking**. OR Click the link for the pregnancy tracking record.
Delete a pregnancy tracking record	1 Select the pregnancy tracking record you want to delete. 2 From the **Actions** menu, click **Delete Pregnancy Tracking**. 3 Click **OK** and skip the remaining steps. **NOTE** To delete a pregnancy tracking record, you need the appropriate permissions. For information about permissions, contact your system administrator.

7 On the **Tracking Details** page, enter or edit the following information:

Field	Description
Due Date	Enter the date the student is expected to give birth.
Leave Date	Enter the date the student is expected to start maternity leave and stop attending classes.
Return Date	Enter the date the student is expected to return to classes after the maternity leave ends.
Doctor's Name	Enter the name of the student's doctor.
Doctor's Phone Number	Enter the doctor's phone number.
Special Accommodation	If applicable, select the special accommodations the student requires.
In Home Services	If the student is receiving any special in-home services related to the pregnancy, select this checkbox.
Prenatal Home/Hospital	If the student is receiving prenatal home or hospital services, select this checkbox.
Pregnancy Outcome	Enter the outcome of the pregnancy, e.g., full term, premature, still born, caesarian birth, miscarriage.
Pregnancy Outcome Date	If the pregnancy did not reach full term or it was a still born birth, enter the date of this outcome.

Field	Description
Birth Date	If applicable, enter the baby's date of birth.
Birth Weight of Child	If applicable, enter the baby's birth weight.

8 If a doctor's office visit record has been created, the date of the visit is displayed. For information about recording doctor's office visits, see "Adding and Editing Doctor Office Visits for Pregnancy Records" on page 41.

9 Click **Apply** to save the data and remain on the page.

OR

Click **OK** to save the data and close the page.

Adding and Editing Doctor Office Visits for Pregnancy Records

1 Log on as a school health professional or school administrator.

2 Search for and open a student record.

3 On the **Student Demographics** page, in the control bar, click **Health Tracking**.

4 On the **Health Profile** page, in the control bar, click **Pregnancy**.

5 On the **Pregnancy** page, select the **Tracking Details** record to which you want to add or edit a doctor's office visit (for instructions about adding a pregnancy record, see "Working with Pregnancy Records" on page 39.)

6 From the **Actions** menu, click **Edit Pregnancy Tracking**.

7 On the **Tracking Details** page, do one of the following:

To	Do this
Add a doctor's office visit record	• From the **Actions** menu, click **Add Doctors Office Visits**.
Edit a doctor's office visit record	1 Select the doctor's office visit record. 2 From the **Actions** menu, click **Edit Doctor's office Visits**. OR Click the link for the doctor's office visit record.
Delete a doctor's office visit record	1 Select the doctor's office visit you want to delete. 2 From the **Actions** menu, click **Delete Doctors Office Visits**. 3 Click **OK** and skip the remaining steps. **NOTE** To delete a doctor's office visit record, you need the appropriate permissions. For information about permissions, contact your system administrator.

8 On the **Doctors Office Visit** page, enter or edit the following information:

Field	Description
Date	Enter the date of the doctor's office visit.
Comments	Enter any additional information about the visit.

9 Click **OK**.

10 On the **Tracking Details** page, click **Apply** to save the data and remain on the page

OR

Click **OK** to save the data and close the page.

11 On the **Pregnancy** page, click **Apply** to save the data and remain on the page

OR

Click **OK** to save the data and close the page.

Working with Screening Records

Use Chancery SMS to track student mandatory or optional health screenings. Create and manage screening records for vision, hearing, dental, and social/emotional issues.

Adding and Editing Vision Screening Information

Vision screening records enable you to record and monitor any problems students may have with their vision, including the eye exam date, providers, diagnosis, and vision solution.

To add and edit vision screening information:

1 Log on as a school health professional or school administrator.

2 Search for and open a student record.

3 On the **Student Demographics** page, in the control bar, click **Health Tracking**.

4 On the **Health Profile** page, in the control bar, click **Screenings > Vision**.

5 If a vision record has been created, the **Vision** page displays the following information:

Field	Description
Record Date	Displays the date the vision record was entered. To edit the information, click the record date.
Referred By	Displays the person referring the student for the screening, e.g., parent, teacher, counsellor.
Observable Problem	Displays the problem or concern, e.g., crossed eyes, signs of infection, broken glasses, squinting.
Action	Displays the recommended course of action, e.g., screening required, referred without screening, updated exam without screening.

6 On the **Vision** page, do one of the following:

To	Do this
Add a vision record	• From the **Actions** menu, click **Add Vision Records**.
Edit a vision record	**1** Select the vision record. **2** From the **Actions** menu, click **Edit Vision Records**. OR Click the link for the vision record.
Delete a vision record	**1** Select the vision record you want to delete. **2** From the **Actions** menu, click **Delete Vision Records**. **3** Click **OK** and skip the remaining steps. **NOTE** To delete a vision record, you need the appropriate permissions. For information about permissions, contact your system administrator.

7 On the **Records** page, enter or edit the following information:

Field	Description
Record Date	Enter the date the vision record was created.
Referred By	Select the person referring the student for the screening, e.g., parent, teacher, counselor.
Observable Problem	Select the problem or concern, e.g., crossed eyes, signs of infection, broken glasses, squinting.
Action	Select the recommended course of action, e.g., screening required, referred without screening, or updated exam without screening.
Parental Consent	If the student's parents have signed and returned a permission form, select this checkbox.

8 If a vision screening details record has been created, the **Records** page displays the following information:

Field	Description
Record Type	Displays the screening number, e.g., screening 1, screening 2.
Screening Date	Displays the date the student received the screening.
Clinicians ID	Displays the ID of the person who performed the screening test, e.g., nurse, screening technician.
Tested With	Indicates whether the student used any aids during the screening test, e.g., unaided, glasses, contact lenses.
Result	Displays the result of the vision test, e.g., Pass, Fail.
Action	Displays the action recommended based on the screening, e.g., Re-screen, Referred.

To add or edit a Screening Details record see “Adding and Editing Vision Screenings Details” on page 44

9 Enter referral and follow-up details:

Field	Description
Eye Exam Date	Enter the date the student received the vision examination.
Exam Provider	Enter the name of the person performing the vision examination, e.g., the name of the optometrist.
Diagnosis	Enter the conclusions resulting from the vision examination.
Vision Solution	Enter the recommendations resulting from the vision examination, e.g., glasses, contact lenses, surgery.
Additional Care Date	Enter the date additional care was received.
Additional Care Provider	Enter the professional who provided the additional care, e.g., physician, optometrist, ophthalmologist.
Payment Type	Select the type of payment used for the vision examination, e.g., Medicaid, Kidcare, medical card, private insurance.
Comments	Enter any additional information related to the vision examination.

10 Click **Apply** to save the data and remain on the page.

OR

Click **OK** to save the data and close the page.

Adding and Editing Vision Screenings Details

1 Log on as a school health professional or school administrator.

2 Search for and open a student record.

3 On the **Student Demographics** page, in the control bar, click **Health Tracking**.

4 On the **Health Profile** page, click **Screenings > Vision**.

5 On the **Vision** page, add or edit a vision record (for instructions, see “Adding and Editing Vision Screening Information” on page 42)

6 On the **Records** page, do one of the following:

To	Do this
Add vision screening details	• From the **Actions** menu, click **Add Vision Screening Details**.
Edit vision screening details	1 Select the visions screening details record. 2 From the **Actions** menu, click **Add Vision Screening Details**.
Delete vision screening details	1 Select the vision screening you want to delete. 2 From the **Actions** menu, click **Delete Vision Screening**. 3 Click **OK** and skip the remaining steps. **NOTE** To delete a vision screening details record, you need the appropriate permissions. For information about permissions, contact your system administrator.

7 On the **Record Details** page, enter or edit the following information:

Field	Description
Record Type	Select the record type, e.g., the screening number.
Screening Date	Enter the date the student received the screening.
Clinicians ID	Enter the ID of the person performing the screening test, e.g., nurse, screening technician.
Tested With	Select any aids the student used during the screening test, e.g., glasses, contact lenses.
Result	Select the test results, e.g., Pass, Fail.
Action	Select the action recommended based on the screening, e.g., re -screen, referral.
Test Device	Select the device used for the screening, e.g., Snellin Chart, Blackbird Vision System.
Comments	Enter any additional information.

8 Click **OK**.

9 On the **Records** page, click **Apply** to save the data and remain on the page.

OR

Click **OK** to save the data and close the page.

10 On the **Vision** page, click **Apply** to save the data and remain on the page.

OR

Click **OK** to save the data and close the page.

Adding and Editing Hearing Screening Information

Use the hearing screening pages to record information about students hearing exams, including exam dates, results, and provider names.

To add and edit hearing screening information:

1. Log on as a school health professional or school administrator.
2. Search for and open a student record.
3. On the **Student Demographics** page, in the control bar, click **Health Tracking**.
4. On the **Health Profile** page, in the control bar, click **Screenings > Hearing**.
5. If a hearing record has been created, the **Hearing** page displays the following information:

Field	Description
Record Date	Displays the date the hearing record was entered.
Referred By	Displays the person referring the student for the screening, e.g., parent, teacher, counsellor.
Observable Problem	Displays the problem or concern, e.g., non-responsive, chronic ear infections, does not respond when name called.
Action	Displays the recommended course of action, e.g., screening required, referred without screening, updated exam without screening.

6. On the **Hearing** page, do one of the following:

To	Do this
Add a hearing record	• From the **Actions** menu, click **Add Hearing Records**.
Edit a hearing record	1 Select the hearing record. 2 From the **Actions** menu, click **Edit Hearing Records**. OR Click the link for the hearing record.
Delete a hearing record	1 Select the hearing record you want to delete. 2 From the **Actions** menu, click **Delete Hearing Records.** 3 Click **OK** and skip the remaining steps. **NOTE** To delete a hearing record, you need the appropriate permissions. For information about permissions, contact your system administrator.

7. On the **Records** page, enter or edit the following information:

Field	Description
Record Date	Enter the date the hearing record was created.
Referred By	Select the person referring the student for the screening, e.g., parent, teacher, counsellor.

Field	Description
Observable Problem	Select the problem or concern, e.g., non-responsive, chronic ear infections, does not respond when name called.
Action	Select the recommended course of action, e.g., screening required, referred without screening, updated exam without screening.
Parental Consent	If the student's parents have signed and returned a permission form, select this checkbox.

8 If a hearing screening details record has been created, the **Records** page displays the following information:

Field	Description
Record Type	Displays the screening number, e.g., screening 1, screening 2. You can record multiple screenings for each hearing record.
Screening Date	Displays the date the student received the hearing screening.
Clinicians ID	Displays the ID for the person performing the screening test, e.g., nurse, screening technician.
Tested With	Displays any aids the student used during the screening test, e.g., hearing aid.
Result	Displays the test results, e.g., Pass, Fail.
Action	Displays the action recommended based on the screening, e.g., re-screen, referral.

For information about adding and editing screening details, see "Adding and Editing Hearing Screenings Details" on page 48.

9 Enter referral and follow-up details:

Field	Description
Hearing Exam Date	Enter the date the student received the hearing examination.
Exam Provider	Enter the name of the person performing the hearing examination, e.g., the name of the audiologist.
Diagnosis	Enter the conclusions resulting from the hearing examination.
Hearing Solution	Select recommendations resulting from the hearing examination, e.g., hearing aid, surgery.
Additional Care Date	If applicable, enter the date additional care was received.
Additional Care Provider	If applicable, enter the professional who provided the additional care, e.g., physician, audiologist.
Payment Type	Select the type of payment used for the hearing examination, e.g., Medicaid, donated, Kidcare, private insurance.
Comments	Enter any additional information related to the hearing examination.

10 Click **Apply** to save the data and remain on the page.

OR

Click **OK** to save the data and close the page.

11 On the **Hearing** page, click **Apply** to save the data and remain on the page.

OR

Click **OK** to save the data and close the page.

Adding and Editing Hearing Screenings Details

1 Log on as a school health professional or school administrator.

2 Search for and open a student record.

3 On the **Student Demographics** page, in the control bar, click **Screenings > Hearing**.

4 On the **Hearing** page, add a **Record** (for instructions, see "Adding and Editing Hearing Screening Information" on page 46)

5 On the **Records** page, do one of the following:

To	Do this
Add hearing screening details	• From the **Actions** menu, click **Add Hearing Screening Details**.
Edit hearing screening details	1 Click the screening details record. 2 From the **Actions** menu, click **Edit Hearing Screening Details**. OR Click the link for the hearing screening details record.
Delete a hearing screening details record	1 Select the hearing screening details record you want to delete. 2 From the **Actions** menu, click **Delete Hearing Screen Details**. 3 Click **OK** and skip the remaining steps. **NOTE** To delete a hearing screening details record, you need the appropriate permissions. For information about permissions, contact your system administrator.

6 On the **Record Details** page, enter or edit the following information:

Field	Description
Record Type	Select the record type, e.g., the screening number.
Screening Date	Enter the date the student received the screening.
Clinicians ID	Enter the ID of the person performing the screening test, e.g., nurse, screening technician.
Tested With	Select the device used during the screening test.
Result	Select the test result, e.g., Pass, Fail.

Field	Description
Action	Select the action recommended based on the screening, e.g., rescreen, referral.
Test Device	Select the name of the device used for the screening.
Tone Test Right	Enter the results of the tone test on the right ear.
Tone Test Left	Enter the results of the tone test on the left ear.
Comments	Enter any additional information.

7 Click **OK**.

8 On the **Records** page, click **Apply** to save the data and remain on the page.

OR

Click **OK** to save the data and close the page.

9 On the **Hearing** page, click **Apply** to save the data and remain on the page.

OR

Click **OK** to save the data and close the page.

Adding and Editing Dental Screening Information

Track dental information for students, such as their oral health history, the nature of their current dental work, and the dental provider

To add and edit dental screening information:

1 Log on as a school health professional or school administrator.

2 Search for and open a student record.

3 On the **Student Demographics** page, in the control bar, click **Screenings > Dental**.

4 On the **Dental** page, review or edit the following information:

Field	Description
Number of Caries	Enter the number of caries in the student's permanent and deciduous teeth.
Number of Fillings	Enter the number of teeth with fillings.
Number of Sealants	Enter the number of sealants applied to the student's permanent and deciduous teeth.
Number of Missing	Enter the number of permanent or deciduous teeth that have been pulled or knocked out.
Additional Comments	Enter any additional dental information for the student.

5 If a dental record has been created, the **Dental** page displays the following information:

Field	Description
Record Date	Displays the date the dental record was created.
Referred By	Displays the name of the person referring the student for the screening, e.g., parent, teacher, counsellor.
Observable Problem	Displays the problem or concern, e.g., Ortho or braces needed, tooth decay, pain.
Action	Displays the recommended course of action, e.g., screening required, referral without screening, updated exam without screening.

6 On the **Dental** page, do one of the following:

To	Do this
Add a dental record	• From the **Actions** menu, click **Add Dental Records.**
Edit a dental record	**1** Select the dental record. **2** From the **Actions** menu, click **Edit Dental Record**. OR Click the link for the dental record.
Delete a dental record	**1** Select the dental record you want to delete. **2** From the **Actions** menu, click **Delete Dental Record**. **3** Click **OK** and skip the remaining steps. **NOTE** To delete a dental record, you need the appropriate permissions. For information about permissions, contact your system administrator.

7 On the **Records** page, enter or edit the following information:

Field	Description
Record Date	Enter the date the dental record was created.
Referred By	Select the person referring the student for the screening, e.g., parent, teacher, counsellor.
Observable Problem	Select the problem or concern, e.g., Ortho or braces needed, tooth decay, pain.
Action	Select the recommended course of action, e.g., screening required, referral without screening, updated exam without screening.
Parental Consent	If the student’s parents have signed and returned a permission form, select this checkbox.
School Site Screening Details	
Screening Date	Enter the date the student received the screening at the school.
Clinicians ID	Enter the name of the person performing the screening test, e.g., dentist, dental hygienist.

Field	Description
Result	Select the result of the screening.
Referral Required	If the student required additional care not available at the school site, select this checkbox.
Cleaning Date	Enter the date the student’s teeth were cleaned at the school.
Fluoride Applied Date	Enter the date fluoride was applied to the student’s teeth at the school.
Sealants Applied Date	Enter the date sealants were applied to the student’s teeth at the school.
Additional Notes	Enter any additional dental information.
Referral and Follow-up Details	
Referral Site	Enter the site the student was referred to, e.g., dental office, orthodontist.
Referral ID	Enter an identifier for the referral site.
Initial Visit Date	Enter the date of the student’s first visit to the referral site.
Referral Status	Enter the status of the referral, e.g., No telephone/unable to contact, Ortho referral, Patient refused treatment.
Completion Date	Enter the date the treatment was completed.
Comments	Enter any additional information related to the dental examination.

8 Click **OK**.

9 On the **Dental** page, click **Apply** to save the data and remain on the page.

OR

10 Click **OK** to save the data and close the page.

Adding and Editing Social/Emotional Screening Records

Record information about students’ social and emotional issues.

To add and edit social/emotional screening records:

1 Log on as a school health professional or school administrator.

2 Search for and open a student record.

3 On the **Student Demographics** page, in the control bar, click **Health Tracking**.

4 On the **Health Profile** page, in the control bar, click **Screenings > Soc/Emotional**.

5 If a social/emotional record has been created, the **Soc/Emotional** page displays the following information:

Field	Description
Record Date	Displays the date the social/emotional record was created.
Referred By	Displays the name of the person referring the student for the screening, e.g., parent, teacher, counsellor.
Observable Problem	Displays the problem or concern, e.g., fearfulness, signs of abuse, irritability.
Action	Displays the recommended course of action, e.g., parent conference, referral to outside agency.

On the **Soc/Emotional** page, do one of the following:

To	Do this
Add a social/emotional record	• From the **Actions** menu, click **Add Social/Emotional Records**.
Edit a social/emotional record	**1** Select the social/emotional record. **2** From the **Actions** menu, click **Edit Social/Emotional Records**. OR Click the link for the social/emotional record.
Delete a social/emotional record	**1** Select the social/emotional record you want to delete. **2** From the **Actions** menu, click **Delete Social/Emotional Record**. **3** Click **OK** and skip the remaining steps. **NOTE** To delete a social/emotional record, you need the appropriate permissions. For information about permissions, contact your system administrator.

6 On the **Details** page, enter or edit the following information:

Field	Description
Social/Emotional Details	
Record Date	Enter the date the social/emotional record was entered.
Referred By	Select the person referring the student for the screening, e.g., parent, teacher, counsellor.
Observable Problem	Select the problem or concern, e.g., fearfulness, signs of abuse, irritability.
Action	Select the recommended course of action, e.g., parent conference, referral to outside agency.
Disposition	
Date	Enter the date of the final outcome of the action taken.

Field	Description
Disposition	Enter the final outcome of the action taken, e.g., medical follow-up, receives outside services.
Disposition Comments	Enter any additional information about the disposition.

7 Click **OK**.

8 On the **Soc/Emotional Screenings** page, click **Apply** to save the data and remain on the page.

OR

9 Click **OK** to save the data and close the page.

Health Reports at a School

The following health reports are available in Chancery SMS 6.7 and higher:

Report Name	Purpose
Immunization Delinquency Letter	This report provides a list of required immunizations for which a student is delinquent, and includes the date that the student was expected to receive the missed dose.
Immunization Next Due Report	This report displays students who are required to receive an immunizations dose, along with the date the next dose is due.
Immunization Non Compliance Report	This report displays students who are non-compliant for specific immunizations.
Student Health Condition Report	This report displays students who have health conditions. The report includes the name of the condition and whether the student is receiving treatment and medication.
Student Immunization History	This report displays a history, by student, of all immunization doses received by the student. The report also indicates whether the immunization is complete or, if not complete, when the next dose is due.

Generating an Audit Trail of Changes to Student Health Data

Audit trails in the Audit Log are time-stamped records of staff's activity in Chancery SMS. Use audit trails to look for modifications to student information and to print this information.

You can view changes to health data for the following categories:

- **Dental Records**
- **Doctor's Office Visits**
- **Examination Details**
- **Examinations**
- **Health Conditions**
- **Health Office Visits**
- **Medication Tracking**
- **Non-scheduled Immunization**
- **Pregnancy**
- **Social/Emotional Records**
- **Student Immunization**
- **Student Immunization Dose**
- **Hearing Records**
- **Hearing Screen Details**
- **Vision Records**
- **Vision Screening Details**

You can produce a report of audited data and choose from a number of different output options. Run this report using the **grid print** icon on the **Audit Log** page.

NOTE
To run a report using the **grid print** icon, a Chancery SMS Report Package must be installed. For further information, see the *Uploading Chancery SMS Report Packages Technical Bulletin*.

To view an audit trail:

1. Log on as school administrator.
2. In the control bar, under **Admin**, click **School Setup**.
3. On the **School Setup** page, under **Audit**, click **Audit Log**.
4. On the **Audit Log** page, from the **Type** dropdown, click the health category that contains the fields for which you want to view changed data.
5. Enter the date range in which you want to search for audit records.
6. If required, to narrow your search results, enter a user ID (this is the ID for the user who changed a record) or the student ID number.
7. Click **Search**. The search results display.

To generate an audit log report:

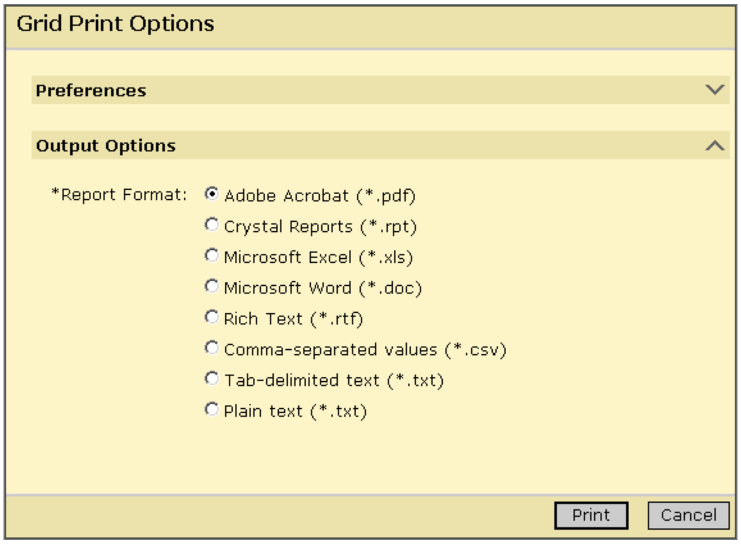
1. On the **Audit Log** page, click the **grid print** icon ( ).

   OR

   From the **Actions** menu, click **Print**.
2. In the **Grid Print Options** dialog, in the **Preferences** panel, specify the following:

Field	Description
Report name	Enter the name of the grid print report, as it should appear at the top of the page. If you do not enter a name, the page name is used.
Print format	Select one of the following formats: • Portrait – prints in portrait format ( ) • Landscape – prints in landscape format ( )
Page size	Select one of the following page sizes: • Letter – prints on 8.5” x 11” paper • Legal – prints on 11” x 14” paper
Include school/ district name	If applicable, select Include school/district name to print the name of your school beneath the report title.
Comments	Enter any information you want to print at the bottom of the grid print report.

3 In the **Output Options** panel, click the down arrow ( )and select one of the available output formats.



4 Click **Print**.

5 Save or print the **Audit Log** as required, then close the window.

6 In the confirmation dialog, click **OK**.