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Getting Started in Medatrax
Welcome to Medatrax

Web address: https://np.medatrax.com/default.aspx

Welcome to Medatrax!

Medatrax advanced medical education informatics and data tracking systems provide web-based tools specifically designed to assist universities, colleges, and allied health educators to record and maintain complex student clinical criteria. Medatrax provides internet accessible data entry and facilitates review of student recorded data. A robust administrative functionality is provided to monitor and control individual student progress.

Medatrax technology is highly configurable and adaptable to either distance programs or campus based institutions. A variety of statistics, monitoring, and reporting information are included to assist and support all educator personnel.

Medatrax, originally developed to track complex requirements for a graduate nursing program, is now available to track and maintain virtually any set criteria. Mobile device interfaces are included with Medatrax technology.

Medatrax.......serving students and educators since 1999

Customer Support:

Our Mission:
At Medatrax, our mission is to provide the medical education profession with informatics solutions that will advance their teaching methodology and students’ learning development. Medatrax has demonstrated a commitment to providing quality service.

Phone
1-800-949-3838

If you use the forgot password feature in the future, you must use your netid@tennessee.edu instead of @uthsc.edu due to how accounts are set up.
Account Activation and Payment

Account Maintenance

Activating Your Medatrax account: (optional)
For programs that elect students to pay Medatrax fees, the system will ask to activate your Medatrax account:

Account Activation
By activating your account, the billing cycle begins. Activation occurs when a successful login is completed. Medatrax fees are due the same time each month. Medatrax accounts are similar to a phone bill (payment is expected each month regardless of usage). Students may purchase a monthly subscription (due the same time each month or pay ‘n’ months in advance:

Click here to continue (and establish a payment date of today) or
Click here to exit.
Please note:
Medatrax does not store credit card information. All credit card payments are non-refundable. After submitting a credit card payment, wait for a completion message... do not click the submit again or leave the browser page prematurely.

By activating your Medatrax account, users are subscribing to a monthly subscription of Medatrax services and software. Please read Medatrax Terms and Conditions before activating accounts.

Making a payment: (optional)
Click the credit card icon at the bottom of your home screen

The payment screen below will appear. Select the number of months desired to pay. Payments can be made monthly or pay for several months in advance. Agree to the Terms and Conditions by placing a check in the box and clicking submit.

*Clicking payment history at the bottom of the screen will bring generate Payment History. Right click the page for a receipt of your transactions or contact Medatrax account specialist for an official receipt of payment.

Complete credit card information in spaces provided. Verify amount to be drafted from card and click submit.

Successful payments are indicated as below:

“Payment Successful”

Students will see the first screenshot above when logging into their account for the first time. Students are given free access to Medatrax until they need to enter clinical hours. If you are in Advanced Health Assessment or clinical your first semester, you will have to begin paying then. The second screenshot shows the credit card payment screen.
Home Screen

This is the Home Screen for Medatrax. This screen provides easy access to all sections of Medatrax and gives you an alert for things you need to address.

You can access many of these options at the top of each screen once you click on an icon as seen below.

HINT: If you ever get lost, you can always
My Account Features in Medatrax
My Account

Clicking on “My Account” will bring you to the second screenshot below. This area of Medatrax includes important functions such as: changing your password, editing account information, managing locations, and managing preceptors.
Change Password

Select “Password” and follow instructions to change. Faculty cannot reset password! After changing your password, update your account information.

Edit Account Information

Select “Edit Account Information” which will bring you to a screen with various tabs. You will be required to update information in the “Demographics” and “Licenses/Certifications” tabs. If you a student that already has an advanced practice certification, you will also use the “Documentation/Management” tab.

![Image of Medatrazx Medical Data Tracking System](image.png)

Please Note: Required fields are indicated with a red *. To refresh each page/tab, scroll down and click submit.

- **User Name:**
- **First Name:**
- **School Email:**
- **Gender:**
- **Ethnicity:**
- **Address:**
- **City:**
- **State/Province:**
- **Zip Code:**
- **Phone:**
- **Cell Phone:**
- **University Student ID #:**
- **Specialty:**

**Middle Name:**

**Alternate Email:**

**DOB:**

**Race:**

**Comments:**

**Submit**

Click back to return to My Account

Click submit to refresh demographics and document uploads only
Start with “Demographics” tab and complete all areas. Fields with a red asterisk are required. Select appropriate specialty/dual specialty.

Click “Submit” after you have updated your information.

If your name changes during the program, be sure to update your information in Medatrax.
The "Immunizations" tab provides a convenient location to keep up with immunization due dates. The only immunization information required to be uploaded in Medatrax are your TB skin test/other TB testing and Influenza information. Both of these are required to be updated annually.

Documentation of TB skin test is required for entry into clinical. Document the date, results and upload documentation. TB skin testing documentation also has to be submitted to University Health by the student.

Many clinical rotations are now requiring documentation of the Influenza vaccine. Enter that you received immunization (yes/no), date administered, and upload documentation. The DNP Program has set a date of November 1st for students to upload Influenza information; however, some clinical sites may require this information sooner. If that is the case, the student will be required to submit their information earlier.
Enter BLS CPR certification and upload a copy of your card under this tab. Be sure to upload you BLS in their first field with the red asterisk. This field is tied to Medatrax alarms and will alert you when you CPR is getting ready to expire. If you have any other CPR certifications (PALS, ACLS, etc.), enter into the appropriate field an upload documentation.

The DNP Program does realize that many students use their employers for renewals of CPR and classes are not always conveniently scheduled, and it can take time for copies of CPR cards to be distributed. However, you will be expected to provide some proof of renewal in Medatrax until your card arrives. This can be an online roster, completion certificate, or letter from the instructor. If at any point, you do not believe you will have your CPR renewed as required, notify your Concentration Coordinator and the Clinical Coordinator.
All students will be required to enter Registered Nurse license information and upload a copy in Medatrax. If you are already an Advanced Practice Nurse, upload a copy of that license as well. The DNP Program understands that some states do not issue paper copies of licenses any longer; therefore, a verification page from the state website will be sufficient.

Students will also receive an alarm in Medatrax prior to their license expiration date as reminder.

If your CPR or License is expired and you have not updated the proper information in Medatrax, you will not be allowed to continue in clinical until this information has been updated. Failure to submit documents can result in failure of the clinical course, or if a repeated occurrence, dismissal from the program can occur. It is the responsibility of the student to ensure this information is up-to-date at all times.
Documentation/Management

The “Documentation/Management” tab will mainly be used for deleting previous files or uploading additional documents that do not have a pre-existing field in Medatrax.

If you already have an advanced practice certification, you will upload this under “Optional Document Uploads” and choose “Other” in Step 1.

The main BLS CPR field will only allow one document to be uploaded in that field at a time. However, you will likely have to upload a replacement document at some time during your program. You can delete the existing document in “Document Management”, so you are able to upload the new one in the “Licenses/Certifications” tab.
Next of Kin

Completing this section gives faculty permission to contact the person identified in the event of an emergency. Completing this section is optional but does provide faculty immediate access to contact information should an emergency arise.

Be sure to select “Submit” before leaving this section!!

<table>
<thead>
<tr>
<th>Next of Kin (NOK) Information</th>
</tr>
</thead>
<tbody>
<tr>
<td>NOK Name</td>
</tr>
<tr>
<td>NOK Relationship</td>
</tr>
<tr>
<td>NOK Address</td>
</tr>
<tr>
<td>NOK City</td>
</tr>
<tr>
<td>NOK State</td>
</tr>
<tr>
<td>NOK Zip Code</td>
</tr>
<tr>
<td>NOK Phone ext:123-456-7890</td>
</tr>
<tr>
<td>NOK Alt Phone</td>
</tr>
<tr>
<td>NOK e-mail</td>
</tr>
</tbody>
</table>

*Completion of this section implies permission to contact designated Next of Kin in an emergency.*
In “Manage Locations”, students can select the clinical sites they will be at for the term. Be sure to click “Save Selection” once you have finished.

Students can also search for previous sites that students have used in their area. You can search by city and state or zip code.

Students DO NOT HAVE THE ABILITY to enter a new site in Medatrax. If a site is not available, you must contact your Clinical Faculty or the Clinical Coordinator.
The "Manage Preceptors" section allows you to select the preceptors you will be with for the term. Be sure to click "Save Selection" when finished. If you click on a preceptor’s name, you will see demographic and contact information for them. If you are unable to check the box next to the preceptor, it means we do not have all the required information (email address, etc.). This will be required before you can select the preceptor.

If your preceptor is not in the list, DO NOT ADD THE PRECEPTOR. Contact your Clinical Faculty or the Clinical Coordinator. If you have an update to your preceptors contact information, please let the Clinical Coordinator know so the information can be updated.
Entering Clinical Data
To log clinical hours, click the “Time Log” icon. It is essential that you log your hours each time you are in clinical. This is required to successfully pass your clinical course and graduate.
Once you click “Time Log”, you will see this screen. To enter your time, you will need to complete the following areas:

1. Select Date
2. Enter hours/minutes
3. Select Location and Preceptor
   Note: If they are not in the drop box, click manage locations or preceptors to select them.
4. Select Setting
5. Select Course
   Note: It is very important to select the correct course you are logging hours for so you receive proper credit!
6. Enter a Note if you are instructed by your faculty or have other information to include.
7. When finished, click “OK”
Entering Patient Information

To enter patient data, click on “Patients” icon on the Home Screen. Students other than Advanced Health Assessment students will be required to enter patient data for each patient you see.
The “Patient Visit List” will appear.

It lists all patient visits you have entered. The list may be narrowed by identifying the course for which the student is entering data. The list may also be searched by entering the Patient Reference number (this is created when you enter a New Patient). These functions will only work for existing patients.

To enter a new patient, select “New Patient”.

<table>
<thead>
<tr>
<th>Patient Reference</th>
<th>Race/Ethnicity</th>
<th>Age</th>
<th>Interaction Level</th>
<th>Location</th>
<th>Reviewed</th>
<th>Visit Date</th>
<th>Created</th>
<th>Visit Time</th>
<th>Notes</th>
</tr>
</thead>
<tbody>
<tr>
<td>123456</td>
<td>Caucasian</td>
<td>24 Years</td>
<td>Level 2</td>
<td>Baptist Memorial Hospital-Desoto</td>
<td></td>
<td>2/25/2016 1:13PM</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>225LM426</td>
<td>Caucasian</td>
<td>52 Years</td>
<td>Level 2</td>
<td>A.P. Psychiatric &amp; Counseling Services</td>
<td></td>
<td>2/15/2016 4:24PM</td>
<td></td>
<td>1:00</td>
<td></td>
</tr>
<tr>
<td>1228_426</td>
<td>American Indian</td>
<td>42 Years</td>
<td>Level 2</td>
<td>A.P. Psychiatric &amp; Counseling Services</td>
<td></td>
<td>2/9/2016</td>
<td>12/28/2015 1:23PM</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
Existing Patients

After you have searched and found the existing patient you are seeing again, then you will need to click “New Visit”. From here, you will enter as you would for a New Patient.
New Patients

After clicking “New Patient, you will then see this screen. You will then need to complete the following steps:

1. Enter patient reference. No information may be used which would independently identify the patient! You need to be able to identify this patient at subsequent visits.
2. Complete the remaining data entry for the patient.
3. The Interaction Level Legend shows the level of involvement the student has in the patient interaction. It is expected at the beginning of the clinical rotation students would start out at a Level 0, with advancement throughout the semester and program.
4. Select “Create”.

After clicking “New Patient, you will then see this screen. You will then need to complete the following steps:

1. Enter patient reference. No information may be used which would independently identify the patient! You need to be able to identify this patient at subsequent visits.
2. Complete the remaining data entry for the patient.
3. The Interaction Level Legend shows the level of involvement the student has in the patient interaction. It is expected at the beginning of the clinical rotation students would start out at a Level 0, with advancement throughout the semester and program.
4. Select “Create”.
The information entered previously will populate the “Patient Detail” screen. Any new or previous visits will be present on this screen.

From the drop down box “Add Visit Data”, you can select items such as Medications, IC 10 codes, DSM 5, etc. The selection you use will be dependent upon your concentration. Your concentration faculty will clarify what is required to be entered on your patients. They will also notify you if you need to complete any forms.

If the patient has a chronic condition or diagnosis which was entered on previous visit, this does not need to be re-entered on subsequent visits. (I.e. COPD)
This is an example of what appears when you click ICD Superbill. Each selection's page will have a search bar you can utilize. Checking the box by “search all” will search all items in the drop down box on the previous slide.

You can always click “Back to Patient” if you end up on the wrong page.
Above is an example of adding a medication to the patient visit. If the patient is on a chronic medication (i.e. Metformin) it is not necessary to enter this at every subsequent visit. If the medication is discontinued or dosage changed, this should be entered.

The same procedure is followed for entry of Procedures. Hint here...utilizing the CPT codes is difficult even for experienced clinicians. My recommendation is to download a user friendly app to get started.
Assignments in Medatrax
Every student will use the assignment function during their program to upload required clinical forms before beginning clinical and submit signed weekly time logs. Some concentrations also have other assignments in their clinical courses in Medatrax.

Assignments can be accessed by clicking the “Assignments” icon on the Home Screen.
Once you click “Assignments”, the “Assignment Summary” screen will appear. This will list all assignments. Students will need to ensure they are submitting documents into the correct assignment. If a student is in two clinical courses during one semester, it is very important that they are submitting assignments to the correct course as well.

Students have the ability to sort assignments by course or status if they wish.

Click “View Assignment Detail” to see additional information on an assignment.
This is an example of assignment details. Details will vary based on the type of assignment. It will include instructions if a file should be named in a particular manner.

Students can review the assignment, upload documents, and include any notes/comments if needed.

Students will need to click “Browse” to select your file and then click “Upload File”. You have the option to enter any comments you would like. Then click “Submit Assignment”. After submitting, the status of that assignment will now show as “submitted”.

As long as an assignment is open, students can edit or upload additional documents in the assignment.
Generating Weekly Time Log
Students in clinical courses other than Advanced Health Assessment will be required to have a weekly time log signed and dated by their preceptor. Students will need to enter their clinical hours in the Medatrax Time Log prior to leaving clinical for the week.

The weekly time log can be generated by clicking the “Time Log” icon on the Home Screen.

Students will then see a section labeled “Reports”. Click on the one name “Summary”.

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The student will need to choose the location, preceptor, and course for the time log report. It is also important to specify the date range for the report. Since this is due every week, you will enter the date range for the week you will have your preceptor sign off on. Then click “Submit”.

Important points to remember:

- If you are in two clinical courses during the same semester, you will have to run a report(s) for each course.
- A signed log will be required for each site clinical site you are using.
- If you have more than one preceptor at the same site and they are okay with signing off on all hours completed, that is acceptable.
After clicking “Submit”, it will generate a log your hours for the specified time period.

Students will then need to get their preceptor to sign and date the log. Since signed logs are due by Monday at 11:55 PM, it will be best to get your time log signed your last day in clinic for the week. It can be signed electronically or printed out and manually signed.

A video tutorial has been created to assist students on how to get the log(s) signed electronically using Adobe Sign & Fill. This can come in very handy if you do not have access to a printer in your clinical area. This tutorial will work for Android and iOS.

The time log(s) will then to be submitted in the Medatrax Assignments area. Please ensure you are choosing the correct assignment. Refer back to the Assignments in Medatrax section above for a reminder of how to submit assignments.

If you are not in clinical for the week, you will submit a note in the assignment stating “Not in clinical this week”.
Reports in Medatrax
Reports

Students may create their own reports. These reports may be downloaded as an Excel spreadsheet. These can be useful when inserting your clinical course data into your portfolio.
Medatrax Support
Contact Information for Medatrax

Office Hours
Monday-Friday 8:00-5:00 Central Time
Saturday 8:00-12:00 Central Time  Phone: 800-647-4838
Email: webmaster@medatrax.com

Help Section

If you select “Help” from the Home Page, it will open an additional window with several helpful documents and videos.