

History Questionnaire User's Guide, APEX 5.X

HOLOGIC®

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Introduction

History Questionnaire is an application used to electronically enter, save and send bone density related patient information.

A questionnaire contains a header and any number of sections. The header includes the facility information and standard patient record fields. Each section can consist of a section title and any number of questions accepting text, numeric, date, yes/no, single-choice, or multiple-choice answers pertaining to patient history data.

Hologic also provides an application (History Questionnaire Designer) that allows Hologic customers to generate their own version(s) of the standard History Questionnaire. Refer to "[Using the History Questionnaire Designer Application](#)" on Page 8.

Using the History Questionnaire

The following sections describe how to use the History Questionnaire application.

1.1 To Start History Questionnaire

Double-click the Hx icon on your Windows desktop.

Upon startup, the application automatically queries QDR Worklist and displays a list of patients in the Main Window. The user selects a patient from the list or adds a new patient, and completes the questionnaire.

1.1.1 Patient Selection List



Note

The list may be sorted, in ascending or descending order, by any column.

- Initial information in the patient selection list is from QDR Worklist.
- One patient record at a time may be selected.

1.2 To Fill Out the Questionnaire



Note

Use the scroll bar to access areas of the questionnaire out of view.

Select a record from the patient list and select **Fill Out Questionnaire**.

Enter patient record data and answer patient history data by clicking in check boxes and radio buttons, and typing in edit boxes.

Clear Button	Clears all information except the initial patient data.
Print Button	Prints the current questionnaire.
OK Button	Submits the questionnaire.
Cancel Button	Exits the questionnaire edit screen without saving data and returns to the main window.

1.3 To Submit the Questionnaire

- When the questionnaire is complete, select **OK**.
- If password protection is disabled, the patient data is temporarily saved on the user's system, then sent to the QDR system.
- If password protection is enabled a password dialog box appears. Enter the password and select OK. The patient data is temporarily saved on the user's system, then sent to the QDR system.

- Select **OK** on the successful or failed message.

1.4 To Update Patient Selection List

On the main window, select **Query**. The application queries the QDR Worklist and updates the list of patients.

1.5 To Add a New Patient

- On the main window, select **Add New Patient**.
- Enter the patient ID and name into the edit boxes. Use Tab to move forward fields; Shift-Tab to move back.
- Select **Fill out Questionnaire**.
- If the ID is the same as an ID in the patient selection list a message appears.
- Select **Close**.
- Correct the ID and select **Fill out Questionnaire**.

1.6 To Print a Blank Questionnaire

- On the main window, select **Print Blank Questionnaire**.
- If necessary, select different printer.
- Select **Print**.

1.7 To Select a Different Template

- On the main window, select the drop down list arrow in the Select a Template area.
- Select the desired template in the list of available templates to choose it.

1.8 To Configure History Questionnaire

- On the main window, select **Configure**.
- In the Select Date Format area, select to choose the desired display.
- In the Patient Biography area, select to choose units of measure for height and weight.
- In the Password area, check the box to choose password protection, then enter and confirm the desired password. Un-check to remove the password.
- In the Localization area (present only if the Language option is installed), choose the desired language from the drop down list.
- In the Print Option area, check the box to choose to print the patient's name and ID on each page of a multiple page questionnaire.
- Select the Communication Tab.
- Type the Host Name or IP Address of QDR and Port Number in the appropriate edit boxes.

- Select **OK** to save the configuration. Select **Cancel** to exit configuration without saving data.

Using the History Questionnaire Designer Application

History Questionnaire Designer is an application that allows Hologic customers to generate their own version(s) of Hologic's standard History Questionnaire.

A questionnaire contains a header and any number of sections. The header includes the facility information and standard patient record fields. Each section can consist of a section title and any number of questions accepting text, numeric, date, yes/no, single-choice, or multiple-choice answers pertaining to patient history data.

1.1 Operating Modes

Questionnaire Designer operates in two modes (Show/Edit) selectable from the View menu.

1.1.1 Show Mode



Note

Use the scroll bar to access areas of the questionnaire out of view.

Displays the questionnaire as it displays in the History Questionnaire application. Questionnaire text cannot be edited. Answer fields can be filled out, however, the results cannot be saved.

Questionnaires that cannot be edited are opened in Show mode and Edit mode is disabled.

1.1.2 Edit Mode



Note

Use the scroll bar to access areas of the questionnaire out of view.

Displays questionnaire as a series of editable fields. Text that cannot be changed is shown for labeling purposes. In Edit Mode you can add, move, or delete section headings, questions and question choices.

Questionnaires that can be edited are opened in Edit mode.



Note

TAG data shown with Section headings, Questions, and Answers (e.g., Answer TAG QR11) is for use in preparing the DxReport. It is automatically generated and cannot be edited.

1.2 To Start Questionnaire Designer

Double-click the Questionnaire Designer icon on your Windows desktop. Copyright information displays followed by a new questionnaire.

1.3 To View/Edit an Existing Questionnaire

If you open a questionnaire that cannot be edited, it is opened in Show mode and Edit mode is disabled.

If you open a questionnaire that can be edited, it is opened in Edit mode.



Note

Use the scroll bar to access areas of the questionnaire out of view.

- Select **Open** from the File menu.
- Navigate to another directory if necessary.
- Double-click on desired Questionnaire.
- Edit existing information as required. To add, move, or delete data in any section area refer to their respective sections in this guide.

1.4 To Create a New Questionnaire



Note

Create a new questionnaire by opening an existing questionnaire, using the Save As function on File menu to create a copy with a new name, and editing as required.

- Select **New** from the File menu.
- Edit existing information as required. Refer to later sections of this guide for details on how to add, move, or delete Section headings or Questions.

1.5 Selecting Questionnaire Items

- Selected items are highlighted in yellow.
- The only items that can be selected are Section Headings, entire questions, and single Selections inside questions.
 - Select a section heading or entire question by clicking within any one of its respective edit boxes or check boxes.
 - Select a single selection within a question by clicking in either of its edit boxes.
- Clicking in an edit box or check box in the Header area turns off selection (nothing is selected).
- Adding an item (section heading, question or selection) automatically selects that item.
- When moving a selected item up/down, the moved item remains selected.
- When deleting an item, the item directly above the deleted item is selected. (Deleting the first selection in a question, selects the entire question.)

1.6 To Add a Section Heading

Inserts a new Section Heading field.

Section Headings are inserted after a selected section name or question. If nothing is selected, the Section Heading is inserted directly below the header.

- Select the item preceding location where section heading is to be inserted.
- Select **Add Section Heading** from Edit menu.
- Edit "Section Name" field. (Unless left blank, displays on the History Questionnaire and is available for display on the DxReport.)

1.7 To Add a Text Answer Question

Inserts a new Question that accepts a text answer.

Questions are inserted after a selected section name or question. If nothing is selected, the question is inserted as the first question in the first section.

- Select the item preceding location where question is to be inserted.
- Select **Add/Question/Text Answer** from Edit menu.
- Edit "Question". (Displays on History Questionnaire unless left blank.)
- Edit "Text for DxReport". (Available to be included in the DxReport unless left blank.)

1.8 To Add a Numeric Answer Question

Inserts a new Question that accepts a numeric answer. Minimum and maximum allowable values for the answer can be specified.

The question is inserted after a selected section name or question. If nothing is selected, the question is inserted as the first question in the first section.

- Select the item preceding location where question is to be inserted.
- Select **Add/Question/Numeric Answer** from Edit menu.
- Edit "Question". (Displays on History Questionnaire unless left blank.)
- Edit "Text for DxReport". (Available to be included in the DxReport unless left blank.)
- If desired, edit "Minimum and Maximum value allowed" fields.

1.9 To Add a Date Answer Question

Inserts a new Question that accepts a date answer. Minimum and maximum allowable date values in a valid date format (today is acceptable) can be specified for the answer.

The question is inserted after a selected section name or question. If nothing is selected, the question is inserted as the first question in the first section.

- Select the item preceding location where question is to be inserted.
- Select **Add/Question/Date Answer** from Edit menu.

- Edit "Question". (Displays on History Questionnaire unless left blank.)
- Edit "Text for DxReport". (Available to be included in the DxReport unless left blank.)
- If desired, edit Minimum and Maximum values allowed fields (in Date format). Can use the word *today*.

1.10 To Add a Yes/No Answer Question

Inserts a new Question that accepts a Yes/No answer. Question displays on the History Questionnaire with a pair of radio buttons labeled "Yes" and "No".

The question is inserted after a selected section name or question. If nothing is selected, the question is inserted as the first question in the first section.

- Select the item preceding location where question is to be inserted.
- Select **Add/Question/Yes/No Answer** from Edit menu.
- Edit "Question". (Displays on History Questionnaire unless left blank.)
- If desired, edit "Display text for Yes in DxReport". (Unless left blank, available to be included in the DxReport when Yes is selected.)
- If desired, edit "Display text for No in DxReport". (Unless left blank, available to be included in the DxReport when No is selected.)

1.11 To Add a Single Selection Answer Question

Inserts a new Question that accepts a single chosen answer from several choices. Question displays on the History Questionnaire with a set of labeled radio buttons. One possible selection may be "Other" in which case a text entry field will display in the History Questionnaire to accept the choice.

The question is inserted after a selected section name or question. If nothing is selected, the question is inserted as the first question in the first section.

- Select the item preceding location where question is to be inserted.
- Select **Add/Question/Single Selection Answer** from Edit menu.
- Edit "Question". (Displays on History Questionnaire unless left blank.)
- Edit "Text for DxReport". (Unless left blank, available to be included in the DxReport if a choice is selected on History Questionnaire.)
- Edit "Text for DxReport if nothing is chosen". (Unless left blank, available to be included in the DxReport if no Selection is chosen on the History Questionnaire.)
- Edit "Selection". (Displays on History Questionnaire unless left blank.)
- Edit "Text for DxReport" following Selection field. (Unless left blank, available to be included in the DxReport if corresponding Selection chosen on History Questionnaire.)
- Uncheck/Check "Include Other Selection?" box. If checked, Other appears as a selection along with a text entry field on History Questionnaire.

- Add additional Selections as required. Refer to [“To Add a Selection Item to Multiple-Choice Question”](#) on Page 12 for detail.

1.12 To Add a Multiple Selection Answer Question

Inserts a new Question that accepts any number of chosen answers from several choices. Question displays on the History Questionnaire with a set of labeled check boxes that allows multiple choices (or none) from several possibilities. One possible selection may be "Other" in which case a text entry field will display in the History Questionnaire to accept the choice.

The question is inserted after a selected section name or question. If nothing is selected, the question is inserted as the first question in the first section.

- Select the item preceding location where question is to be inserted.
- Select **Add/Question/Multiple Selection Answer** from Edit menu.
- Edit "Question". (Displays on History Questionnaire unless left blank.)
- Edit "Text for DxReport". (Available to display on DxReport if one or more choices is selected on History Questionnaire.)
- Edit "Text for DxReport if nothing is chosen". (Available to display on DxReport if no selection is chosen on History Questionnaire.)
- Edit "Selection". (Displays on History Questionnaire.)
- Edit "Text for DxReport" following Selection field. (Available to display on DxReport if corresponding Selection chosen on History Questionnaire.)
- Uncheck/Check "Include Other Selection?" box. If checked, Other appears as a selection along with a text entry field on History Questionnaire.
- Add additional Selections as required. Refer to [“To Add a Selection Item to Multiple-Choice Question”](#) on Page 12 for detail.

1.13 To Add a Selection Item to Multiple-Choice Question

Inserts a new Selection item to a selected multiple-choice (single or multiple selection) question.

If the whole question is selected, the new Selection is inserted as the first Selection in that question. If a Selection is selected, the new Selection is inserted directly below the selected Selection.

- Select the item preceding location where the Selection is to be inserted.
- Select **Add Selection** from Edit menu.
- Edit "Selection". (Displays on History Questionnaire unless left blank.)
- Edit "Text for DxReport" following Selection field. (Unless left blank, available to be included in the DxReport if corresponding Selection chosen on History Questionnaire.)

1.14 To Move an Item Up or Down

Moves selected item up or down one step in the Questionnaire if possible.

1.14.1 Move Down Restrictions

- The first Section heading cannot be moved down unless there is another Section heading directly below it. (No Questions between first and second Section headings.)
- The last Section heading cannot be moved down unless there is a question below it.
- The last question in questionnaire cannot be moved down unless there is a Section heading below it.
- The last Selection in a question cannot be moved down.

1.14.2 Move Down Effects

- If a Section heading is selected, the Section heading is moved down past the Section heading or Question directly below it.
- If an entire Question is selected, the entire Question, including all Selections, is moved down past the Question or Section heading directly below it.
- If a Question's Selection is selected, the Selection is moved down past the Selection directly below it.

1.14.3 Move Up Restrictions

- The first Section heading cannot be moved up.
- The first Question in the first Section cannot be moved up.
- The first Selection in a Question cannot be moved up.

1.14.4 Move Up Effects

- If a Section heading is selected, the Section heading is moved up past the Section heading or Question directly above it.
- If an entire Question is selected, the entire Question, including all Selections, is moved up past a Question or Section heading directly above it.
- If a question's Selection is selected, the Selection is moved up past the Selection directly above it.

1.14.5 Moving an Item

- Select the item to move.
- Select **Move/Up** or **Move/Down** from Edit menu.

1.15 To Delete an Item

Removes the selected item from the questionnaire if possible.

1.15.1 Delete Restrictions

The first Section heading cannot be deleted unless there is another Section heading directly below it. (No Questions between first and second Section headings.)

If an entire Question is selected, the entire Question is removed. If a question's Selection is selected, only that Selection is removed.

1.15.2 Deleting an Item

- Select the item to delete.
- Select **Delete** from Edit menu.

1.16 To Configure Questionnaire Designer

- Select **Configure** from the menu bar.
- If desired, select a different directory as the default (base) directory using the Questionnaire Directory edit box and Browse button.
- If desired, select a different supported language using the Language drop down list box (present only if the Language option is installed).
- If desired, select a different supported font size using the Base Font Size drop down list box.
- Select **OK**.

1.17 To Make a New Questionnaire Available for Use

- Adds a newly designed questionnaire to the History Questionnaire Template folder.
- Use Windows Explorer to find the Questionnaire Designer Results folder. A typical path to this folder is as follows:
C:\Program Files\Hologic\Questionnaire Designer\Results.
- Open the Results folder and copy the XML file for the new questionnaire (filename will be in the form new_questionnaire_name.xml).
- Use Windows Explorer to find the History Questionnaire Template folder. A typical path to this folder is as follows:
C:\QDR\HxQuestionnaire\Template.
- Open the Template folder and paste the XML file for the new questionnaire into it. Ensure that the XML file is **not** read only. To do this, right click on the filename and select properties. The properties screen appears.
- If Read-only is checked, uncheck it, then select Apply and OK.
- If History Questionnaire is open, close it and re-open it. The new questionnaire will be in the drop down list in the Select a Template area.