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Getting Started

Logging in: Once you have launched the Application you will be greeted with the login screen. This page has two text fields and two buttons. To login simply enter your username and password. Once both the username and password are entered just press the Login button. The password is case sensitive so be sure to check that caps lock is off. If you make a mistake or wish to restart you can press the Clear button in order to clear both fields.


Possible Errors: In the case where the user has inputted the incorrect username or password they will receive the following notification.
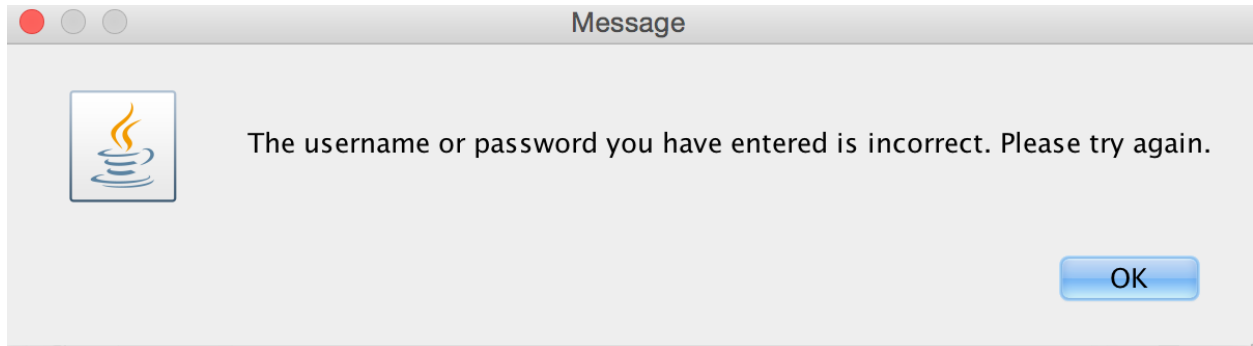
As mentioned before the password IS **case sensitive**. The password must be an exact match to the one the Administrator created for you. Usernames must also be unique. Meaning there cannot be two different users with the same username.

Main Screen

Upon successful Login the main screen will grace your eyes
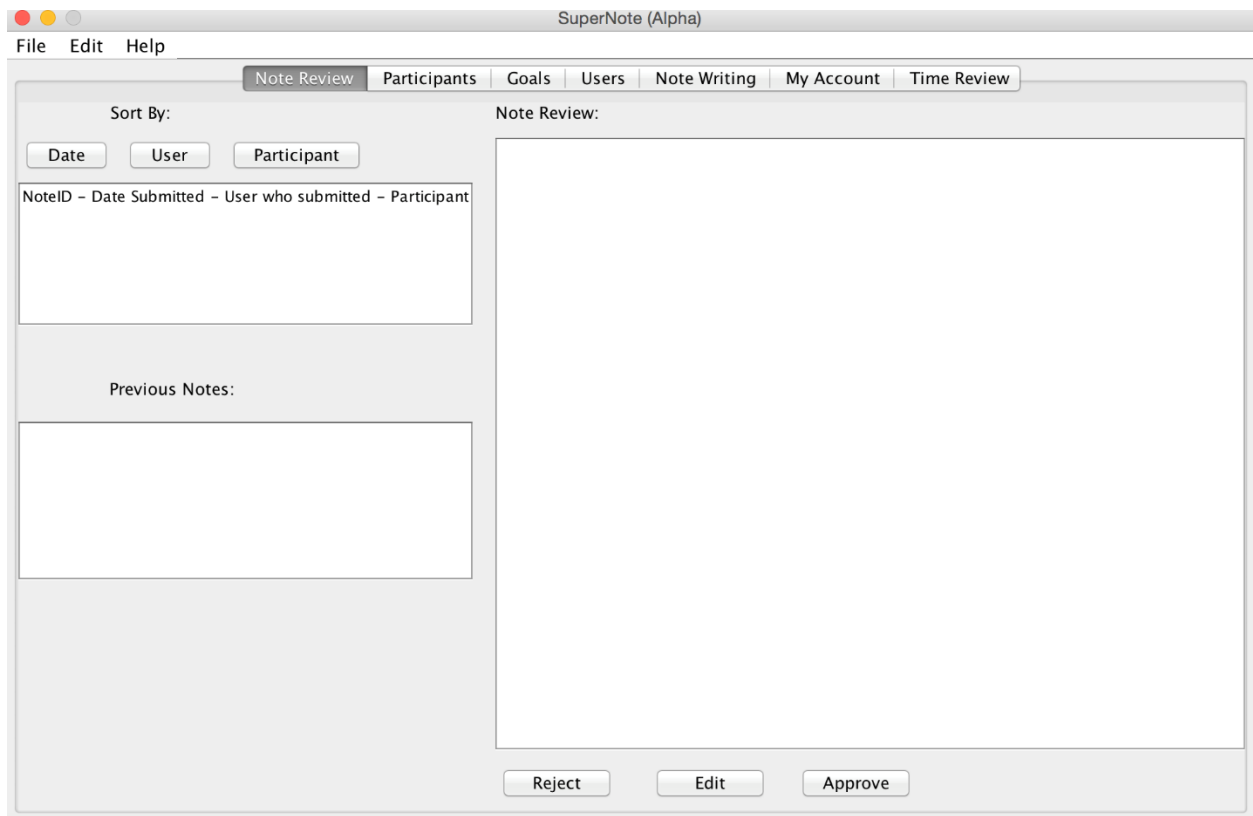
The Main screen or Admin Form as we called it has seven tabs. All of which will be explained in detail later in the guide. For now we'll focus on the toolbar at the top.
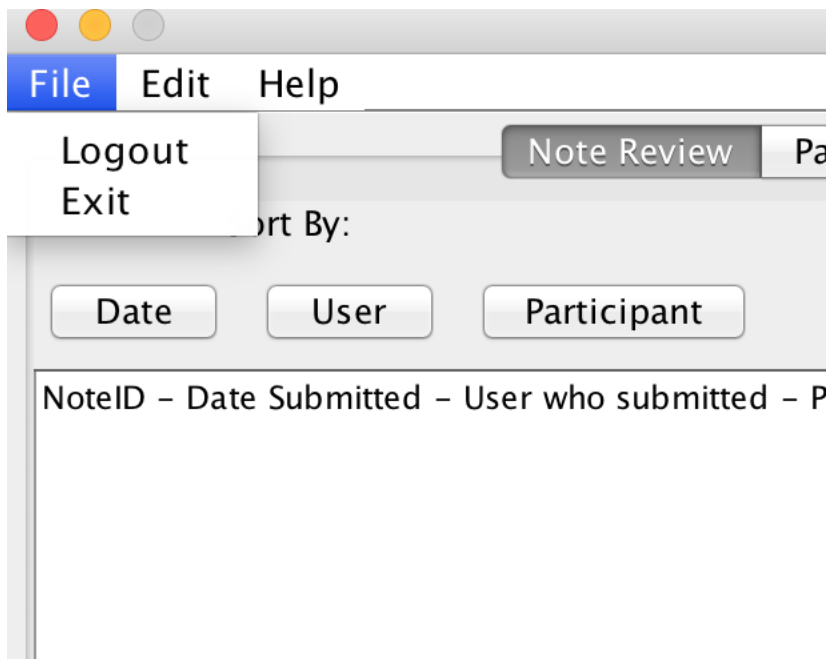
The not so aptly named File tab houses the ability to logout and exit the program outright. Logging out takes you back to the Login screen. Exit will close the program and any unsaved data will be lost.
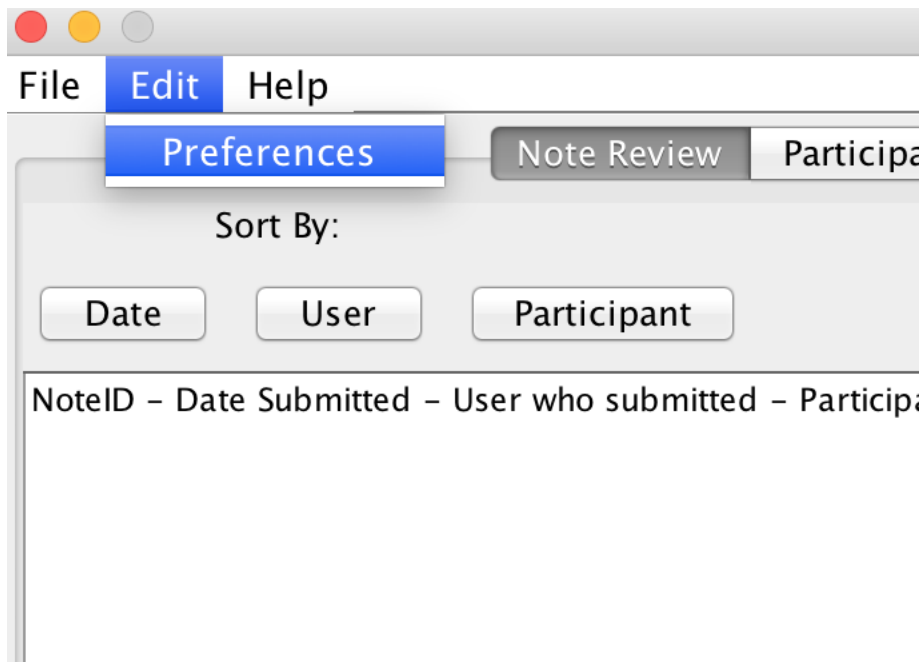
Preferences is not yet functional.
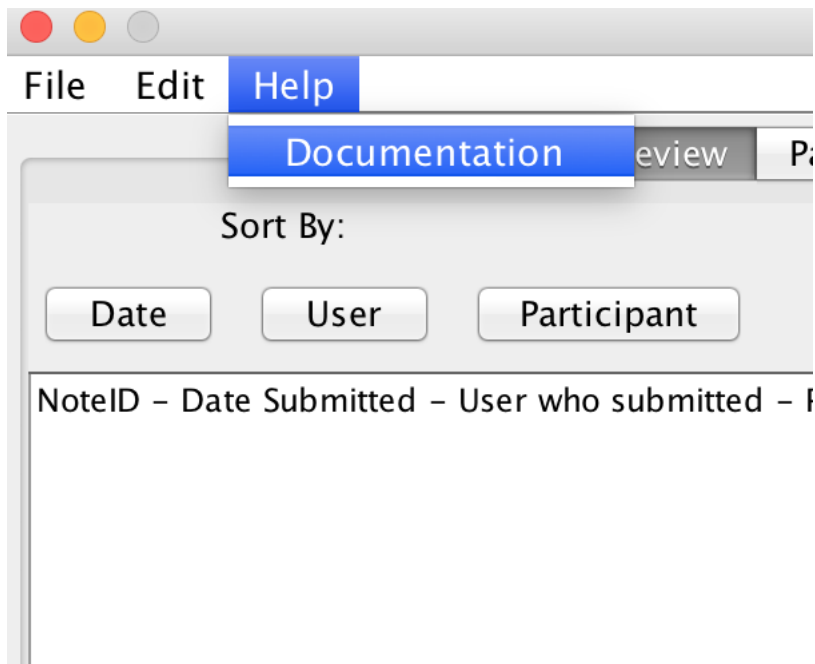
Clicking on documentation will fire up this document for you to read. Seeing as how you are currently reading this sentence my guess is you already figured that one out.

User Tab:

The user page has three main functions. You can add a user to the system, delete a user from the system under certain circumstances (more on that later), and updating a user's information. Let's go over these functions one at a time.

Insert: Inserting a user is just a few steps. Leave the Select User dropdown box alone for now. First fill in the text fields with the information their label asks for. Usernames must be unique since this is how you will be identified while logging in. If you attempt to add a duplicate user the program will prevent you from doing so and tell you to choose a unique name. Both the password and name fields will accept any input. The User Level drop down has all the privilege levels available to a user. The number of tabs shown to a user depends on their user level.

      Admin has access to everything

      Reviewer has access to note writing, note review, time review, and my account.

      DCP has access to note writing and my account

      Auditor has not yet been implemented

      Terminated is for users that have been denied access by the Administrator

Update: To update a user simply select the user from the Select User dropdown at the top of the tab. All the fields on the page should populate with the selected user's information. From here you can change anything you wish to update. When you are satisfied click update and confirm your action to update the user.

Delete: The program records the user who writes each note. This is to help keep the writer of each note accountable for the quality of the note. Because of this the delete function only works on users who have not submitted a note or saved a draft. This is to preserve the integrity of each note stored in the

system. If a user who has written notes needs to be removed for some reason, update their user level using the update function and select "Terminated". The delete button is more for accidental insertions.

Participant Tab:

The Participant page allows you to add and update a participant.

Insert: To add a participant leave the Select A Participant dropdown box alone. Select an insurance for the participant. If you selected Self-Pay then you can skip adding the Medicaid number. Once you have filled out all the required fields for the participant you can click add participant to insert them into the system.

Update: To update a participant use the Select A Participant from the dropdown box at the top of the page. Once selected the other fields should fill with the participant's information. Change the participant's information as desired before clicking the update participant.

Note: Mandatory forms have not been implemented yet and do not do anything.

Goals Tab:

The Goal page allows you to add and update the goals for a specific Participant. The Remove button currently does not work.

Insert goal: To insert a goal first select a participant from the Select A Participant dropdown. If that participant already has some goals in the system then the Select A Goal dropdown will have those in the list. Check the goals in that list if you cannot remember if you already added a certain goal. Once you're sure you need to add a new goal select the first item in the Select A Goal list that looks like a dash. This lets the system know you're creating a new goal. Select a frequency, interval, and fill out the remaining fields before clicking "Add".

> **Frequency –** is the number of times a goal is completed within the time interval

> **Interval** – Is the measure of time over which the goal must be done at a certain frequency

Update goal: To update a goal select the participant from the participant dropdown. Next select a goal from the goal dropdown. If nothing shows up in the dropdown it means that the selected participant does not have any goals entered. When a goal is selected then all of the components will populate with the goal's information. Change any information as desired before clicking update.

Remove goal: removing a goal does not currently work.

My Account:

The account page allows you to change your password as well as select a draft to continue to work on.

Update Password: Changing password requires you to enter your current password, enter your new password and confirming your new password to be entered. Like before the password is case sensitive so be sure to match case when confirming the new password.

My Notes: this feature allows you to select drafts that you have saved previously. If you have saved drafts they will show up when you open the list. To continue working on the draft simply select it and click the "Open" button. Deleting a draft works the same way as opening one. Select a draft and click Delete. If you end up submitting the draft be sure to come back here and delete it.

Note writing:

The Note Writing page allows you to submit notes and save drafts that you ca continue later. To start select a participant in the participant dropdown. Once selected, that participant's goals will automatically be placed into the five small text fields on the page. If a participant has one goal then only the first text field will be filled. If the participant has two then only the first two will fill and so on. If the note writer needs to insert the text of the goal into the main note they can click on the arrow buttons to add the goal's text. The Note is of course written in the largest text field on the page.

Submit Note: Once you are satisfied with the note click Submit Note button. This will open the comment page. Enter a comment you would like the reviewer to see, or for future reference. Hit submit once more to fully enter the note into the system.

Save Draft: If for some reason you need to exit the program while writing a note. You can save the note without submitting it by clicking the Save Draft button. Simply confirm the action and the note will be saved. To later access the saved draft go to the My Account tab and select it from the My Notes section of the page. See My Account section in this guide for more.

Note: The goal prompt levels and radio buttons on the left side of the page are not yet functional. Neither are the forms check boxes on the right. The calendar is more of a concept of design for the following teams to complete.

Note Review Tab:

File   Edit   Help

| Note Review | Participants | Goals | Users | Note Writing | My Account | Time Review |

Sort By:

[Date]   [User]   [Participant]

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NoteID – Date Submitted – User who submitted – Participant
16 – 04/27/2016 – Debbie King – 2:John Doe
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Previous Notes:

Note Review:

[Reject]   [Edit]   [Approve]

Note Review once completed will allow you to approve, edit, and reject notes that have been submitted by a writer. To view a note simply select it in the top left list area. Selecting an item in the list will pull the text from that note and place it in the large text area to the right. This text area is note editable by default as to prevent the user from accidentally editing the note.

Edit Note: If you need to make an edit to a note click the Edit button. This pulls up another window that has the note's text inside of it. You can edit this text area. When you are finished editing the note click submit to input the changes to the window. Then click approve to save the edit to the system.

Approve: If you are happy with the note, or have already edited the note then click approve to accept it.

Reject: Has not yet been implemented because the system to return notes to the writers has not been finished.

Note: The sort by function does not work yet. The previous notes List is not yet implemented.

Time Review:

Time Review has not been finished as of yet. No function should work on this page. It will work in much the same was as Note Review when finished.