

USER'S MANUAL

HOME CARE CLIENT
PROFILING AND PLANNING



Contents

1. Introduction	3
2. System Requirements	3
3. Execute and Configure	3
4. Logging in to the Application	5
System Administrator Registration and First-Time Login	5
Subsequent Logins	6
Subsequent User Registration	6
Logging out	8
Forgot Password	8
5. User Roles and Responsibilities	9
5.1 Case Manager.....	9
Managing Cases	9
Case Creation.....	14
Budget Planning.....	16
Client Services Officer (CSO)	18
Manage Assigned Assessments.....	18
Closing a Case.....	18
Making Assessments	20
Client Profile Management	22
Deactivate a client	24
Enrol New Client.....	25
Budget Viewing	27
Reports Generation.....	31
5.3 System Administrator.....	35
User Management.....	35
Update User Data	35
Deactivate a User	36
Password Reset	38
Employee Management.....	39
Manual Adding of Employee	41
Bulk Adding of Employee	42
Manage Service Rates	44
Manage Funding Rates	46
6. Error Messages.....	47
7. Troubleshooting	47
7.1 Common Issues	47

1. Introduction

The **Home Care Client Profiling and Planning System** desktop application is designed to streamline the case management process for home care providers. It allows case managers, client services officers (CSOs), and system administrators to manage client profiles, create care plans, manage budgets, and generate reports.

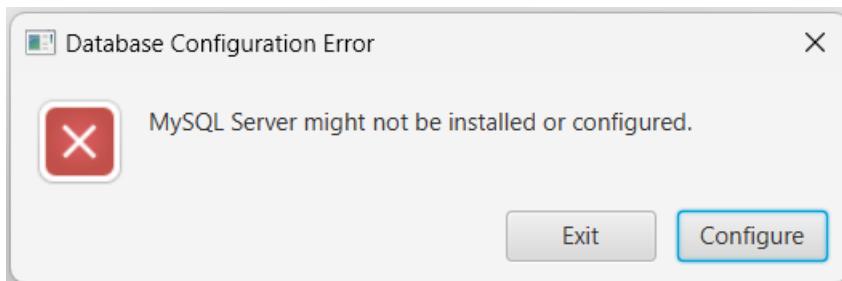
2. System Requirements

Before installing the desktop application, ensure that your system meets the following requirements:

- **Operating System:** Windows 10/11 later
 - **Processor:** Intel Core i5 or equivalent
 - **Memory:** 8 GB RAM
 - **Storage:** 500 MB available space
 - **Additional Software:** Java Runtime Environment (JRE), .NET Framework (for Windows users)
 - **Internet Connection:** Required for synchronization and updates
-

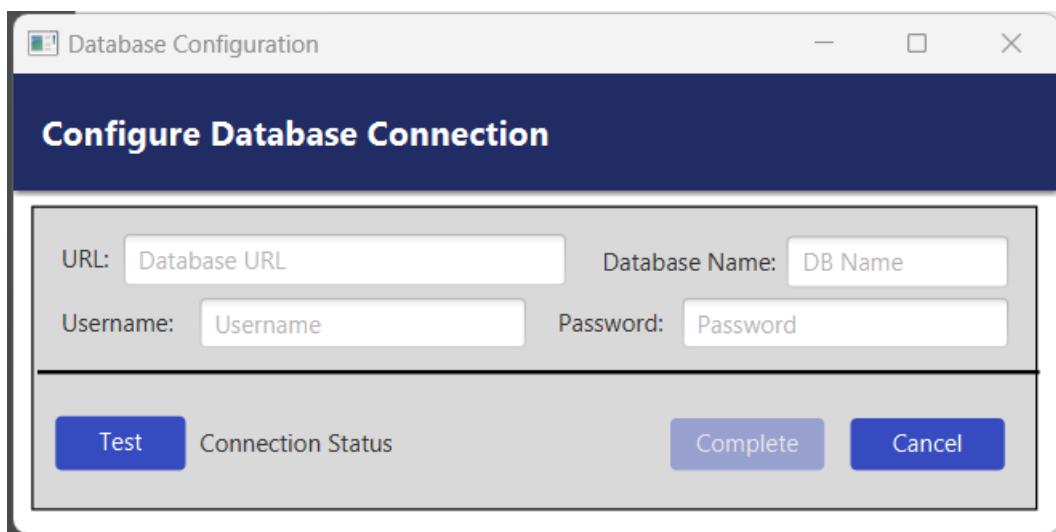
3. Execute and Configure

1. Open the software ([HomeCare.exe](#) /)
2. Wait until the components are fully established.
3. Once the initialisation is complete provide the database configuration details (only on first run). These are MySQL details which should be available upon successful installation of the same.

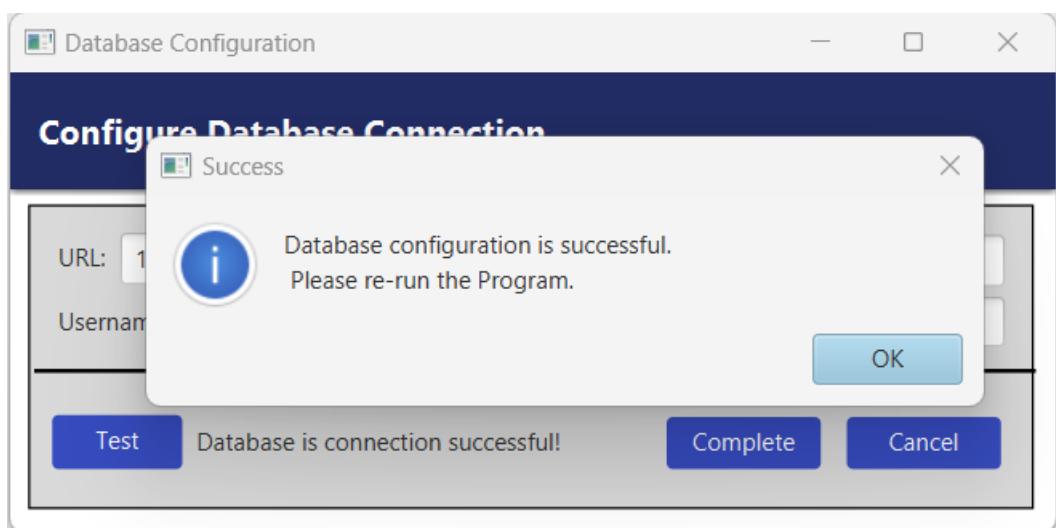


Default Settings

URL: localhost
Database Name: HCP_PBP
Username: <your username>
Password: <yourpassword>



4. Test the Database connection by pressing Test Button.
5. When successful, click on complete and follow the on-screen instructions. If failed, double check the provided Database credentials.



4. Logging in to the Application

System Administrator Registration and First-Time Login

- After the successful configuration and system verification, prompt will require registration of the **System Administrator** who will be responsible for registering and setting up an account first before other users can log in.

The screenshot shows a Windows-style application window titled "System Administrator Registration". The main title bar is dark blue with white text. Below it, a secondary title bar says "Setup System Administrator". The main content area contains a form with the following fields:

- Employee ID: [Text input field]
- First Name: [Text input field]
- Last Name: [Text input field]
- Birthday: [Text input field] with a calendar icon
- Email: [Text input field]
- Contact: [Text input field]
- Address: [Text input field]
- ZipCode: [Text input field]
- Position: [Dropdown menu] set to "System Administrator"
- User Name: [Text input field]
- Password: [Text input field]

At the bottom of the form are three buttons: "Register" (blue), "Cancel" (gray), and "Clear" (gray).

- Fill all the fields and click on Register. Follow the on-screen validation prompts until the successful registration. Once registered, this automatically leads to system login.

The screenshot shows a Windows-style application window titled "Home Care Clients Profiling and Planning". The left sidebar has a dark blue background with white text:

Welcome to
**Home Care Client
Profiling and
Planning**

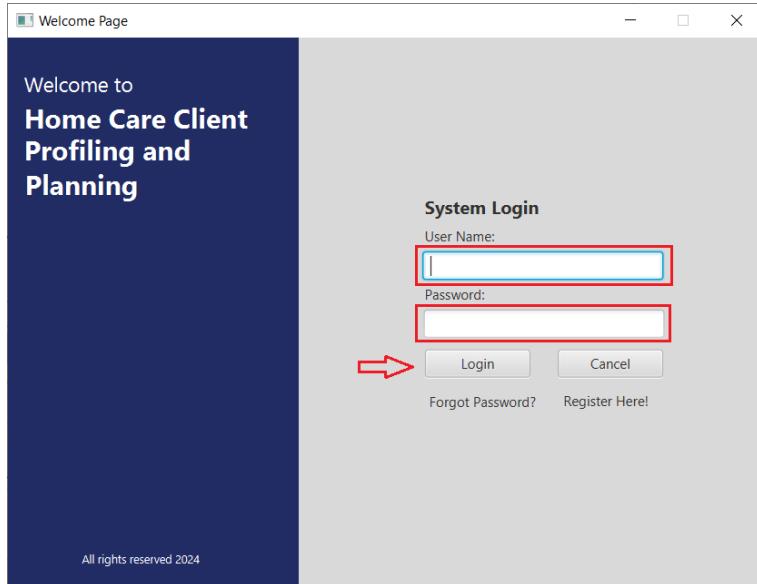
The main content area has a light gray background. It displays a "Register as a new user" form with the following fields:

- Employee ID: 1234
- First Name: bob
- Last Name: ong
- Birthday: 10/4/1992

A small "Success" dialog box is overlaid on the main form, containing the message "New user account has been created." with an information icon. At the bottom of the main form are three buttons: "Register" (blue), "Cancel" (gray), and "Clear" (gray). The footer of the application says "All rights reserved 2024".

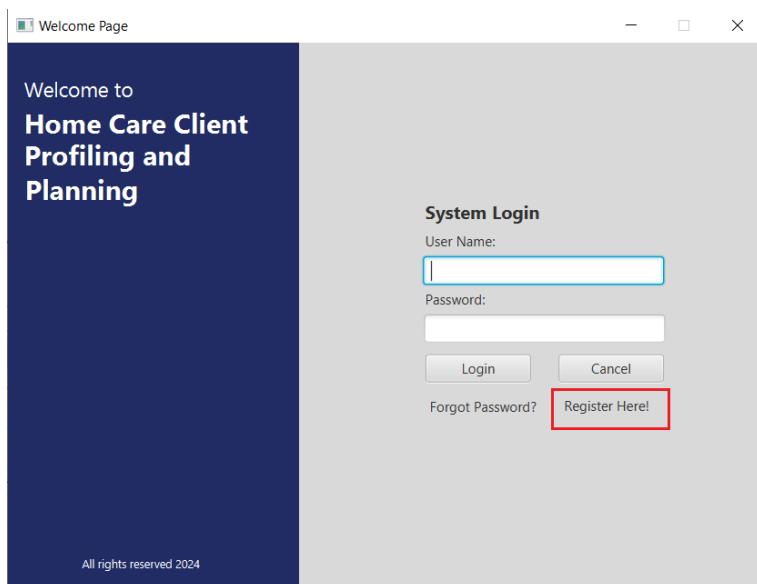
Subsequent Logins

1. Open the application and enter your credentials.
2. Click **Login** to access the dashboard.

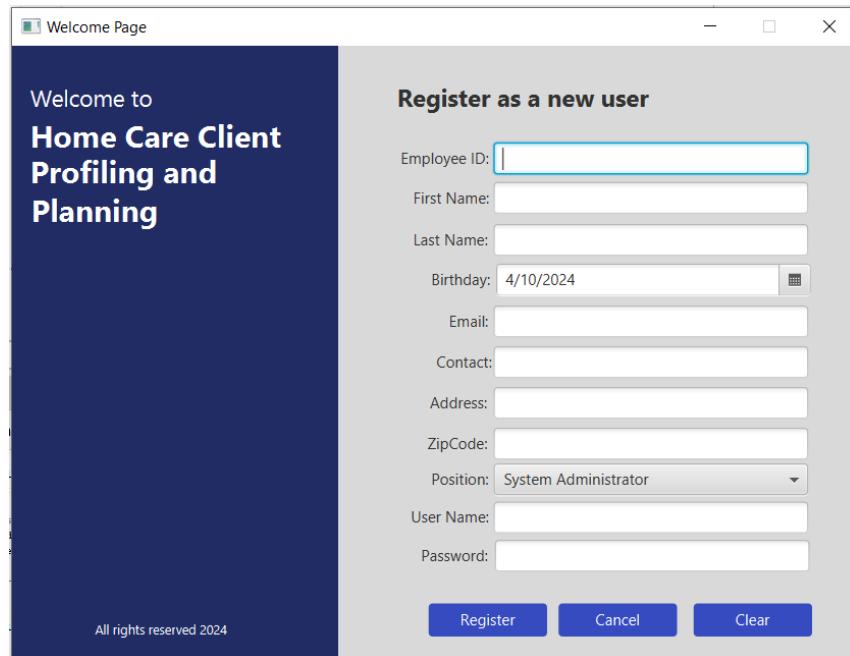


Subsequent User Registration

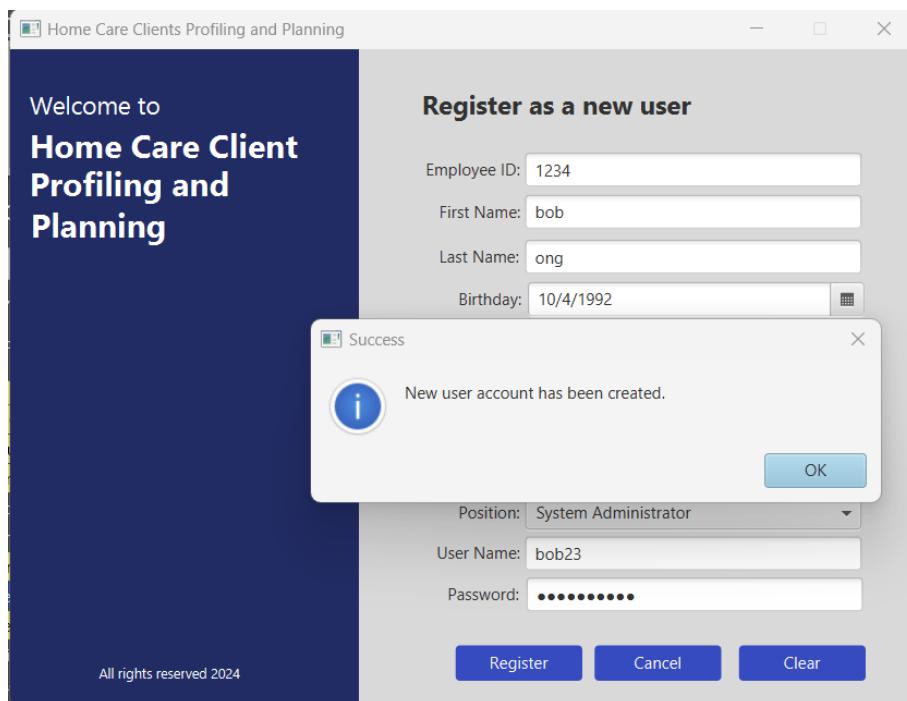
1. On the **Welcome Screen**, click **Register Here**.



2. Enter the required details and follow the validation prompts.



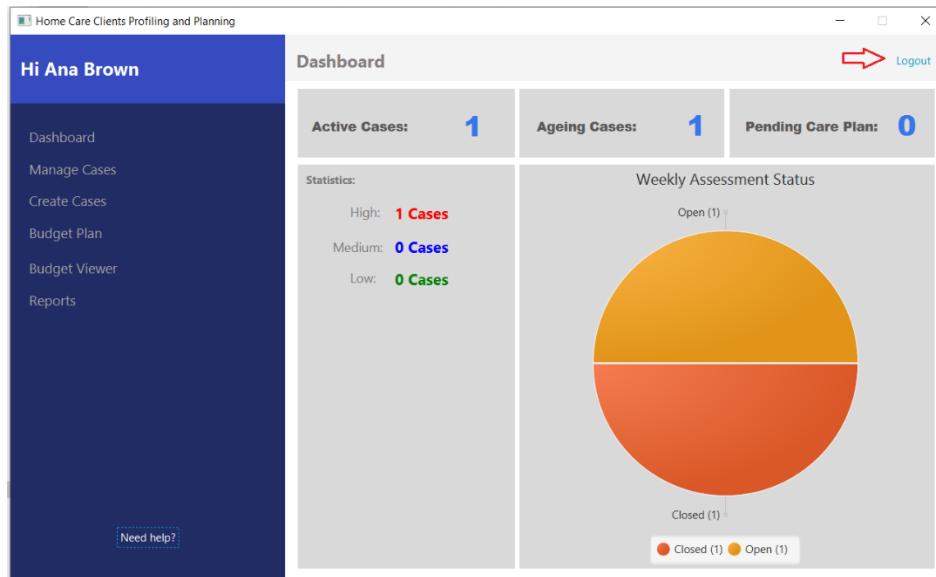
3. Once the account details are submitted, the system will generate a **new account** which can be used to navigate the system depending on the user role.



4. Log in using the newly created credentials to access the system.

Logging out

1. Click on the Logout link in the top-right corner of the dashboard.
2. Select **Logout** to securely end your session.



Forgot Password

1. To reset the password, request a onetime token from the System Administrator. Once the one-time token has been generated by the System Administrator. Click on the Forgot Password and provide the required fields.

The screenshot shows the Services Offered application. A modal dialog box titled 'Reset Password' is open, containing fields for 'User Name', 'Verification Code', and 'New Password', each with an associated input box. Below the input boxes are 'Reset' and 'Cancel' buttons. In the background, a login screen is visible with fields for 'Email' and 'Password', and buttons for 'Login' and 'Cancel'. At the bottom of the screen, there are links for 'Forgot Password?' and 'Register Here!'. The footer of the application says 'All rights reserved 2024'.

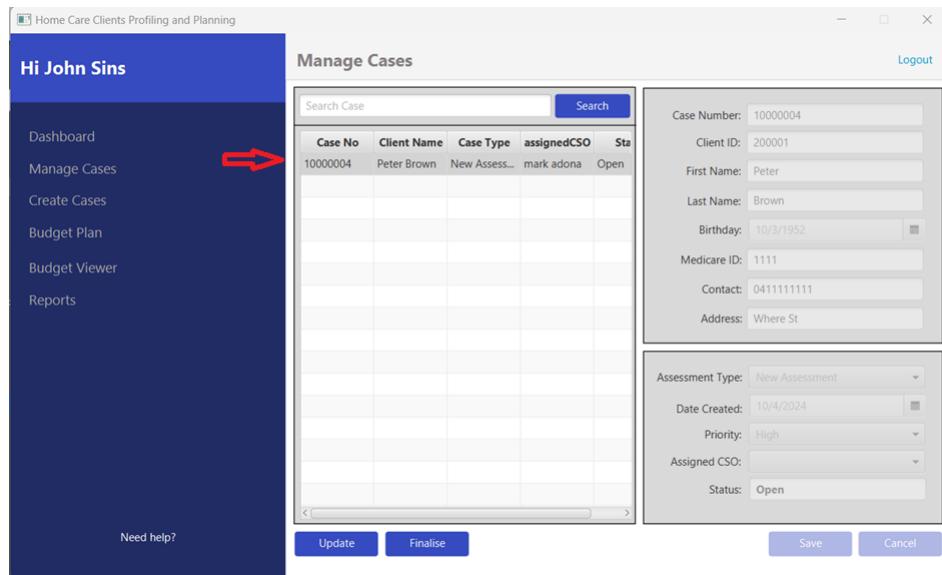
2. Click Reset to confirm the details and follow the on-screen instructions and confirmations.

5. User Roles and Responsibilities

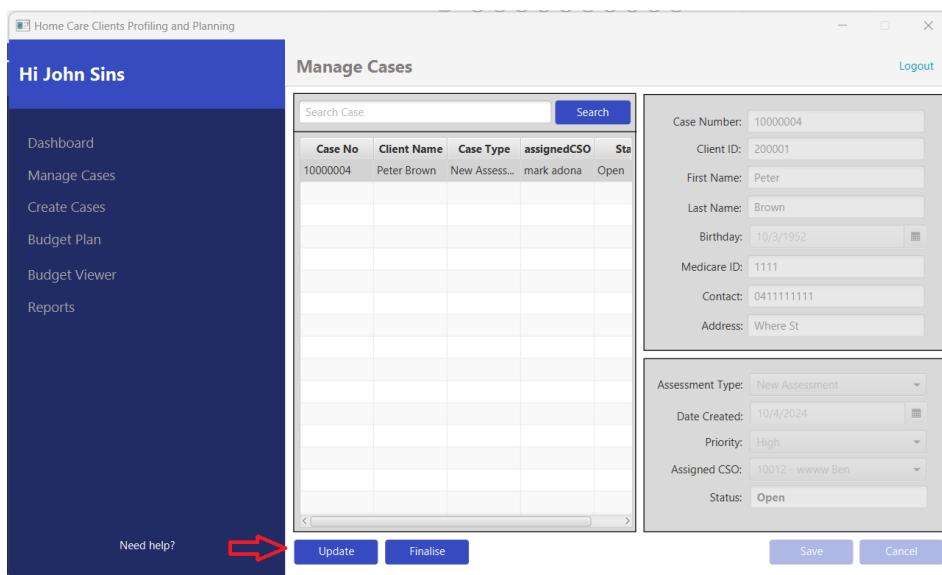
5.1 Case Manager

Managing Cases

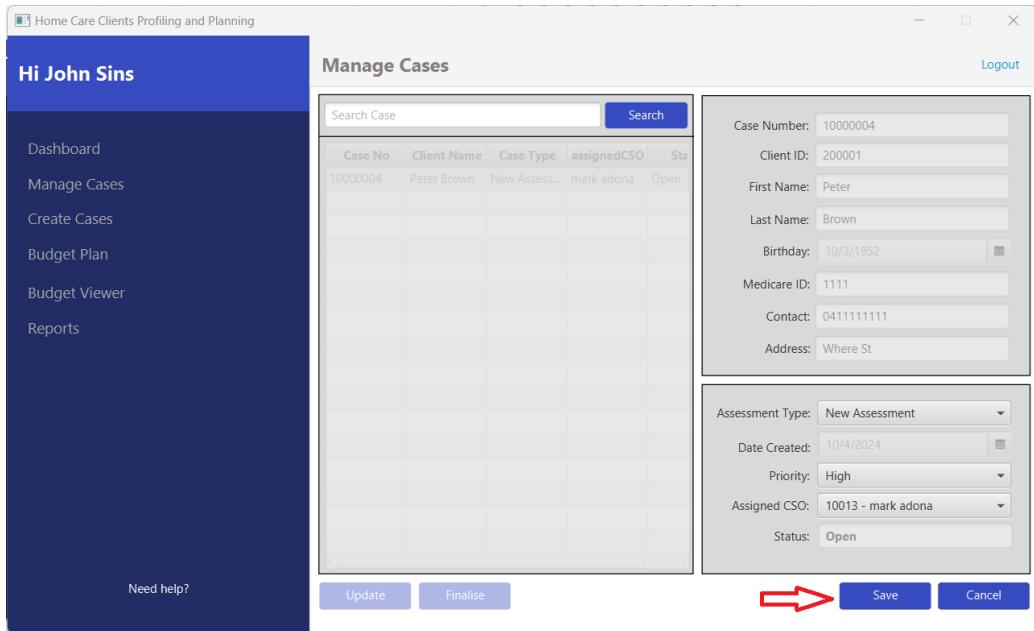
1. To manage the cases, navigate to Manage Case and select a case that you wish to manage.



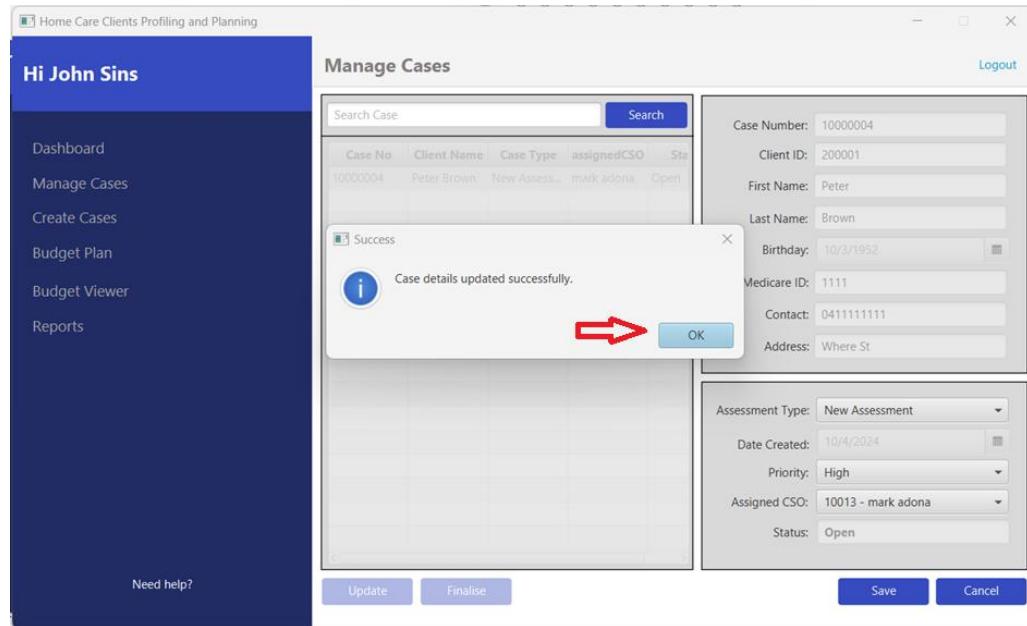
2. To update the Case Assignment, Priority Level and Assessment Type, click on the Update Button.



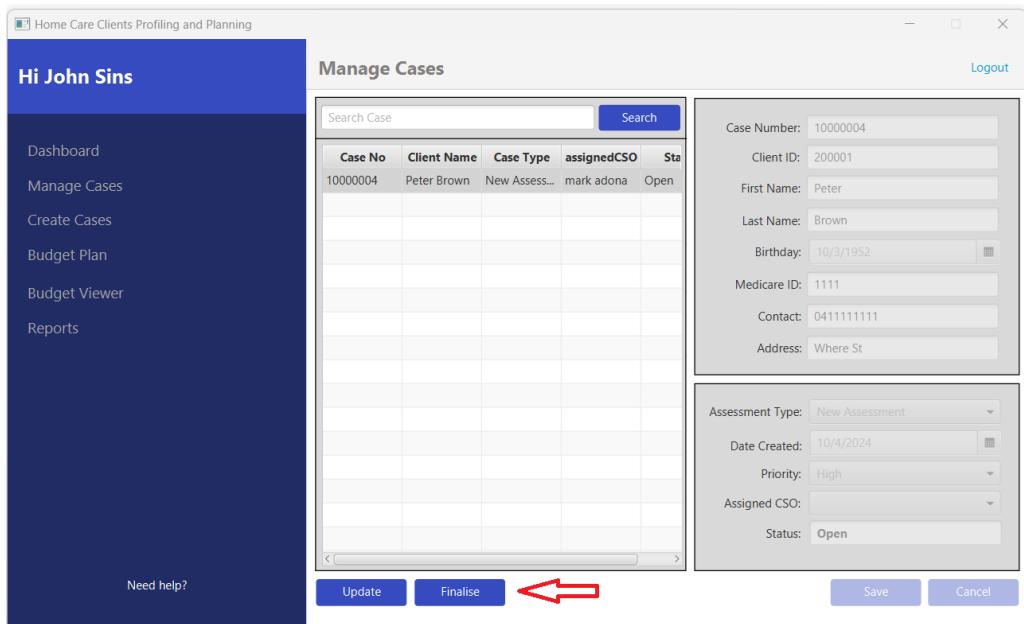
3. Change as necessary then click on save to complete.



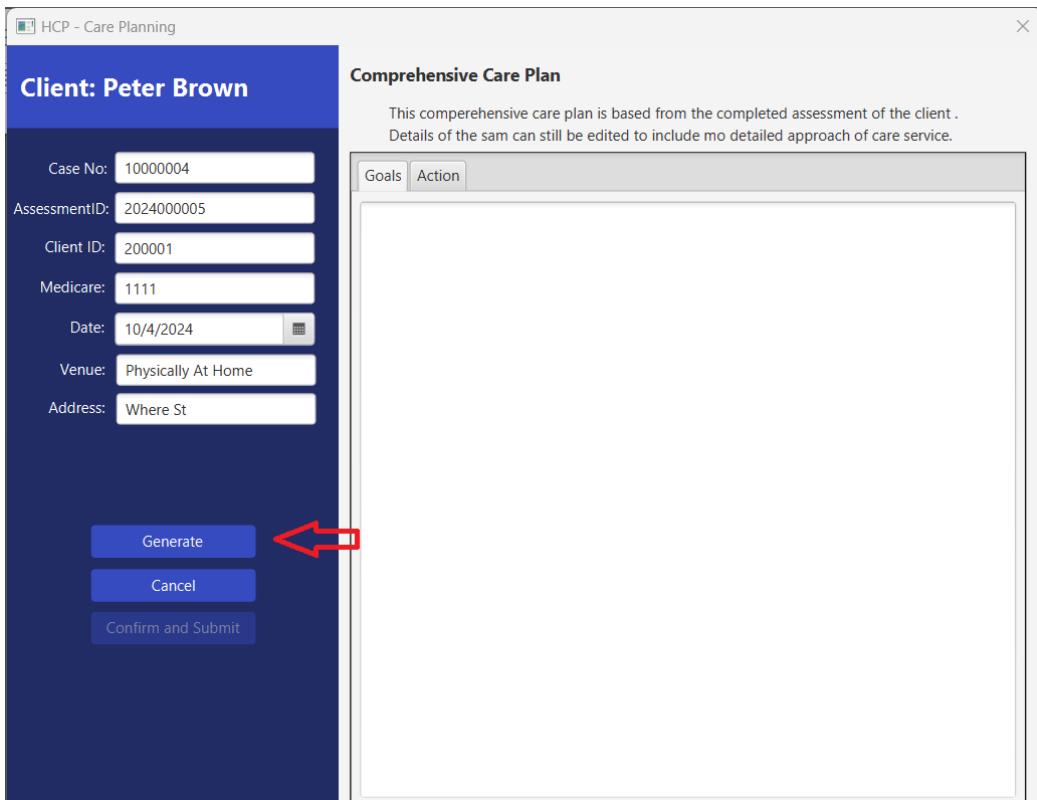
4. Confirmation dialog will prompt.

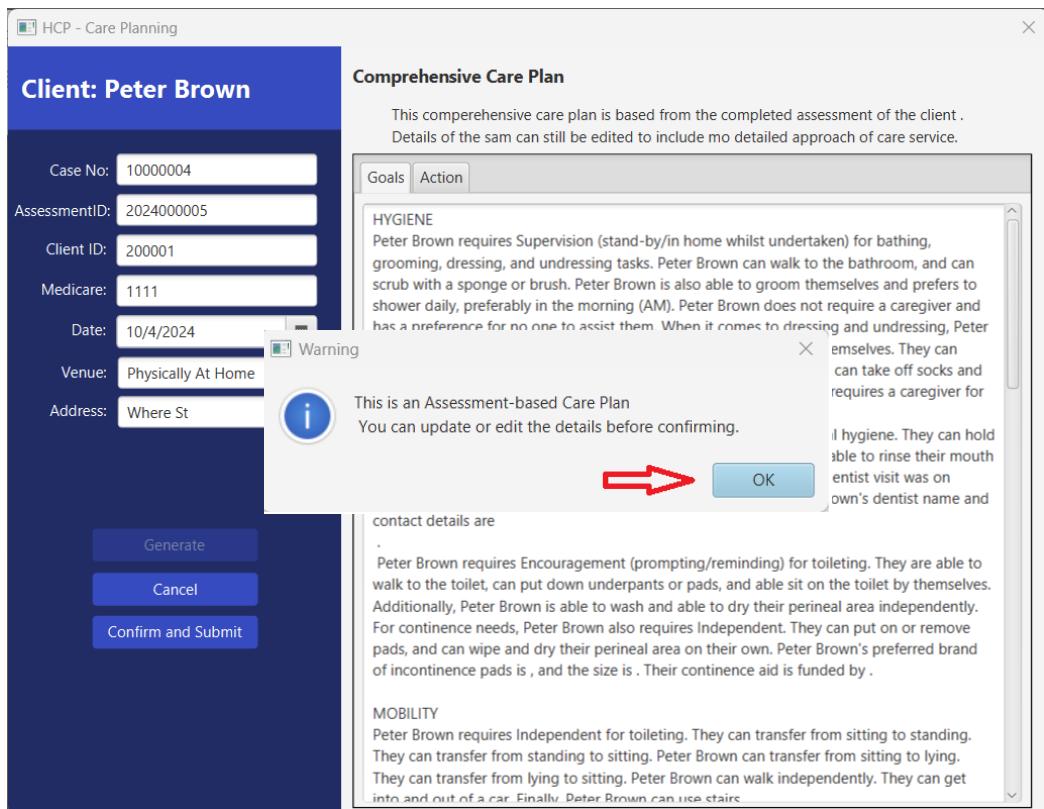


- To Create Care Plan / Generate Care Plan, select a case from the table and click on Finalise Button. This will open a new window that will automatically generate a care plan.

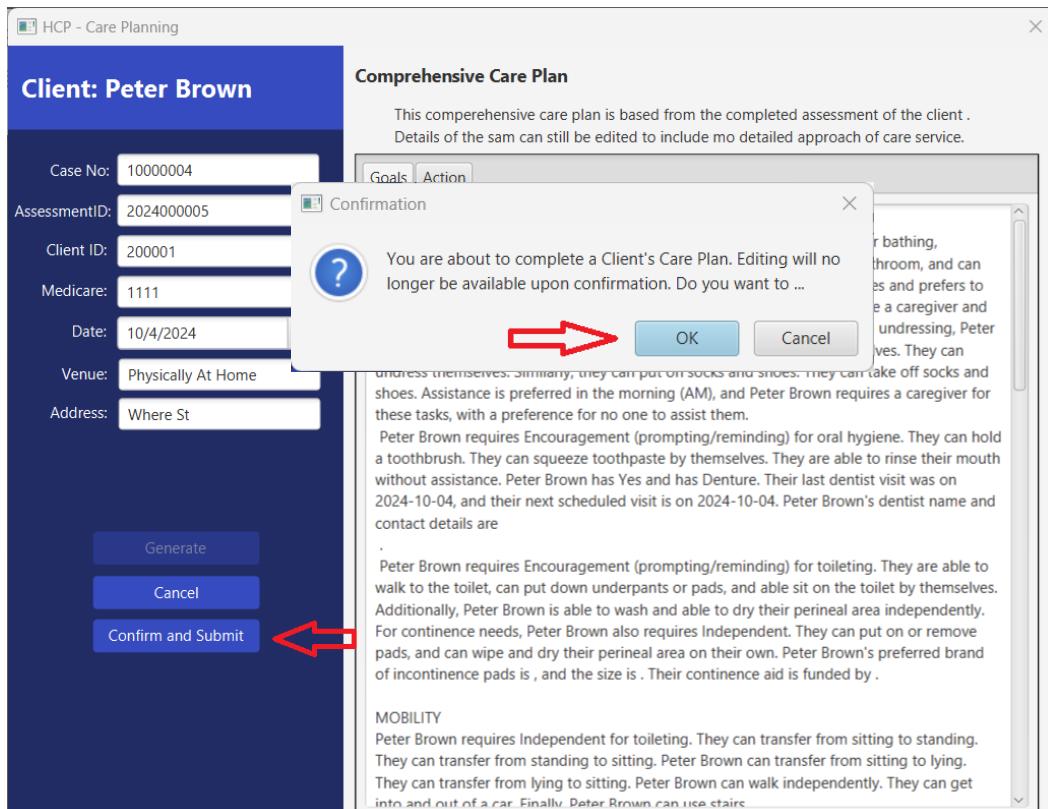


- In the new window, click on Generate Button. This automates the generation of care plan. After generating, it will be enabled to allow updates from the user.

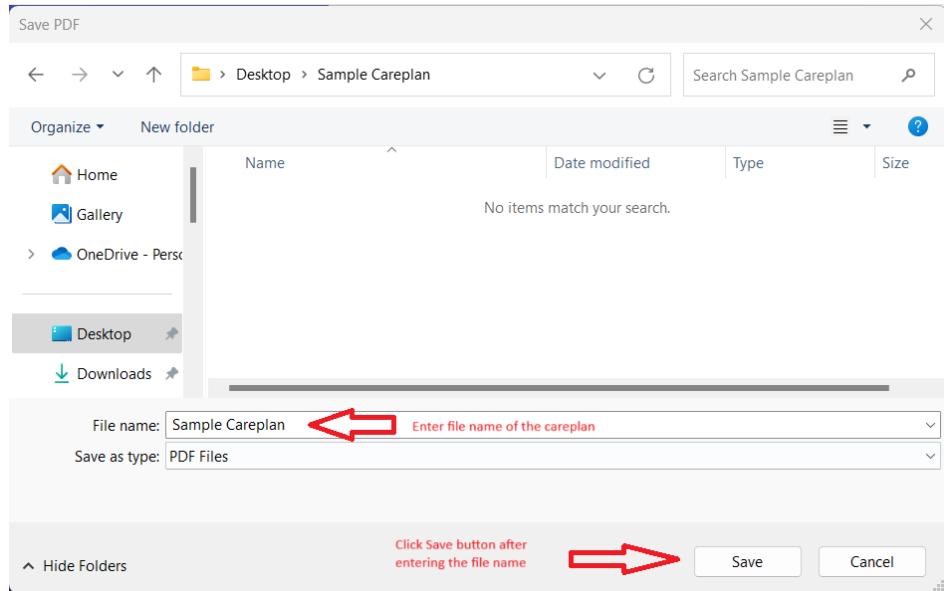




7. To confirm the generated Care Plan, click on confirm and submit button.



8. This will open a new window that will ask to locate the file saving path and to name the file. (Locate and name the file as intended)



Sample Company Home Care Provider
120 Spencer St, Melbourne VIC 3000
Created By: Case Manager Name
Date Created: 04/10/2024

My Plan

Client Number: 200001
Client Name: Client: Peter Brown
Client Address: Where St
Case Manager: John Doe
Assessed Level: Level 2
Assessment Date: 04/10/2024
Plan Review: N/A
Venue: Physically At Home

GOALS:

HYGIENE Peter Brown requires Supervision (stand-by/in home whilst undertaken) for bathing, grooming, dressing, and undressing tasks. Peter Brown can walk to the bathroom, and can scrub with a sponge or brush. Peter Brown is also able to groom themselves and prefers to shower daily, preferably in the morning (AM). Peter Brown does not require a caregiver and has a preference for no one to assist them. When it comes to dressing and undressing, Peter Brown also requires full physical assistance. Peter Brown can dress themselves. They can undress themselves. Similarly, they can put on socks and shoes. They can take off socks and shoes. Assistance is preferred in the morning (AM), and Peter Brown requires a caregiver for these tasks, with a preference for no one to assist them. Peter Brown requires Encouragement (prompting/reminding) for oral hygiene. They can hold a toothbrush. They can squeeze toothpaste by themselves. They are able to rinse their mouth without assistance.

Peter Brown has Yes and has Denture. Their last dentist visit was on 2024-10-04, and their next scheduled visit is on 2024-10-04. Peter Brown's dental name and contact details are . Peter Brown requires Encouragement (prompting/reminding) for toileting. They are able to walk to the toilet, can put down underpants or pads, and able sit on the toilet by themselves. Additionally, Peter Brown is able to wash and able to dry their perineal area independently.

For continence needs, Peter Brown also requires Independent. They can put on or remove pads, and can wipe and dry their perineal area on their own. Peter Brown's preferred brand of incontinence pads is , and the size is . Their continence aid is funded by MOBILITY Peter Brown requires Independent for toileting. They can transfer from sitting to standing. They can transfer from standing to sitting. Peter Brown can transfer from sitting to lying. They can transfer from lying to sitting. Peter Brown can walk independently. They can get into and out of a car. Finally, Peter Brown can use stairs. The client uses no mobility aids as aids for mobility. Peter Brown uses a mechanical lifter and Peter Brown has a history of falls.

Details of their last fall include . Peter Brown is exercising. They are doing . They requires a referral to Allied Health Services such as physiotherapy, hydrotherapy, or occupational therapy. In terms of mobility, Peter Brown is unsteady, stooped over, and leaning to one side. Peter Brown does not have trouble breathing. Regarding communication, Peter Brown has No specific limitation. Peter Brown is able to fit their hearing aids and able to check or change batteries.

NUTRITION Peter Brown requires no assistance for their nutritional needs. They require assistance with nutrition, meal preparation, or when eating or drinking. They require meal delivery service. Peter Brown has swallowing difficulties when eating or drinking. They have lost weight in the past year and do take any meal or nutritional supplements. Peter

Case Creation

- To create a new case, click on the Create Cases from the left panel menu. This will open a new window.

The screenshot shows the 'Manage Cases' interface. On the left, a sidebar lists 'Dashboard', 'Manage Cases', 'Create Cases' (highlighted with a red arrow), 'Budget Plan', 'Budget Viewer', and 'Reports'. The main area displays a table of cases with columns: Case No, Client Name, Case Type, assignedCSO, and Status. A specific row for 'Peter Brown' is selected. To the right, detailed client information is shown in two panels: 'Client Details' and 'Assessment Type'. At the bottom are 'Update' and 'Finalise' buttons on the left, and 'Save' and 'Cancel' buttons on the right.

- Select a client from the list and click on Create Button.

The screenshot shows the 'Create New Case' window. At the top, it says 'Create a new case' and 'Create a new Case Profile for a client.' Below is a search bar with 'Search Client' and 'Search' button, and a 'Case Number' field set to '10000005'. A table lists clients with columns: Client Number, Client Name, Medicare ID, and Funding Level. The second client, 'Gregory Williams', is highlighted with a red arrow and labeled 'Select client'. In the bottom half, client details are entered: Client ID (200001), First Name (Peter), Last Name (Brown), Birthday (10/3/1952), Medicare ID (1111), Contact (0411111111), and Address (Where St). A note 'Click create button after selecting the client' points to the 'Create' button at the bottom. Other fields include Case Type (New Assessment), Client Status (New Client), Date Created (10/4/2024), Priority (High), CSO Assignment (10012 - www Ben), and Target Completion (10/4/2024). At the bottom are 'Create', 'Confirm', and 'Cancel' buttons.

3. Manage the case information then click on the confirm button.

Create a new case

Creating a new case for client:
Peter Brown

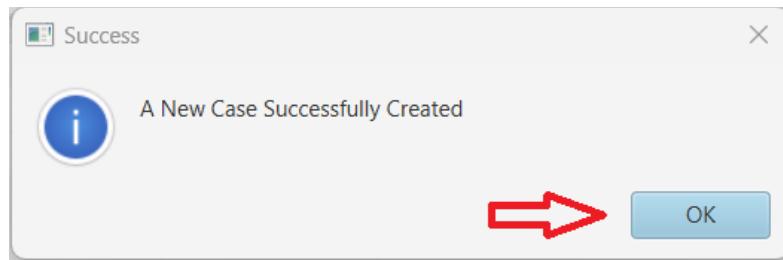
Client Number	Client Name	Medicare ID	Funding Level
200001	Peter Brown	1111	Level 0
200002	Gregory Williams	1234	Level 2
200003	Danica Ballesteros	1	Level 0
200004	ew ew	2323	Level 0

Client Details:

Client ID: 200001	Case Type: New Assessment
First Name: Peter	Client Status: New Client
Last Name: Brown	Date Created: 10/4/2024
Birthday: 10/3/1952	Priority: High
Medicare ID: 1111	CSO Assignment: 10012 - www Ben
Contact: 0411111111	Target Completion: 10/4/2024
Address: Where St	Create 

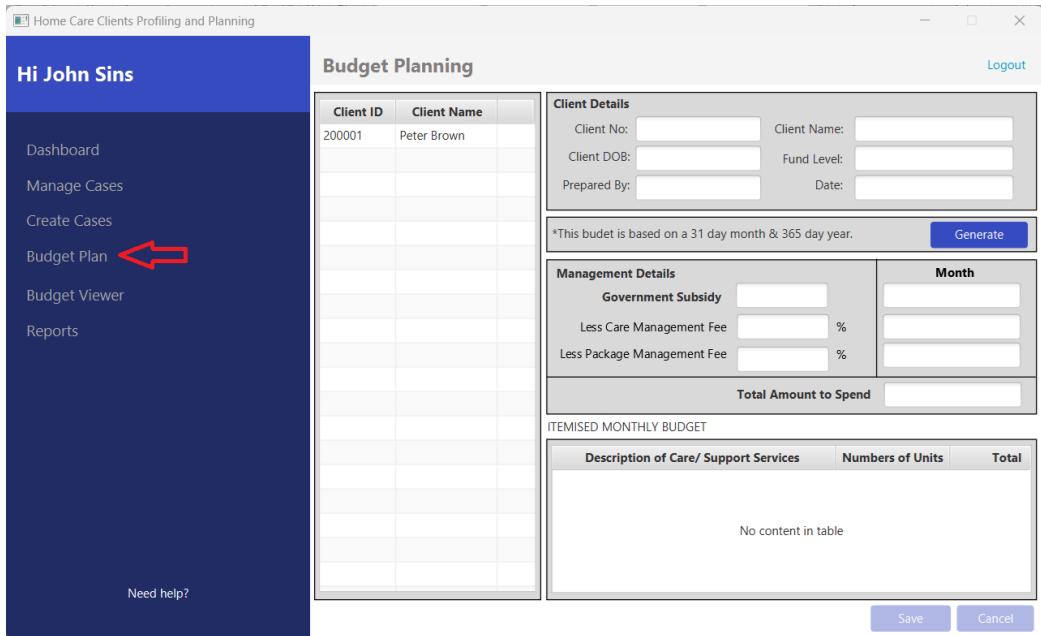
Buttons: Confirm Cancel

4. This will automatically create a new case for a specific and chosen client.

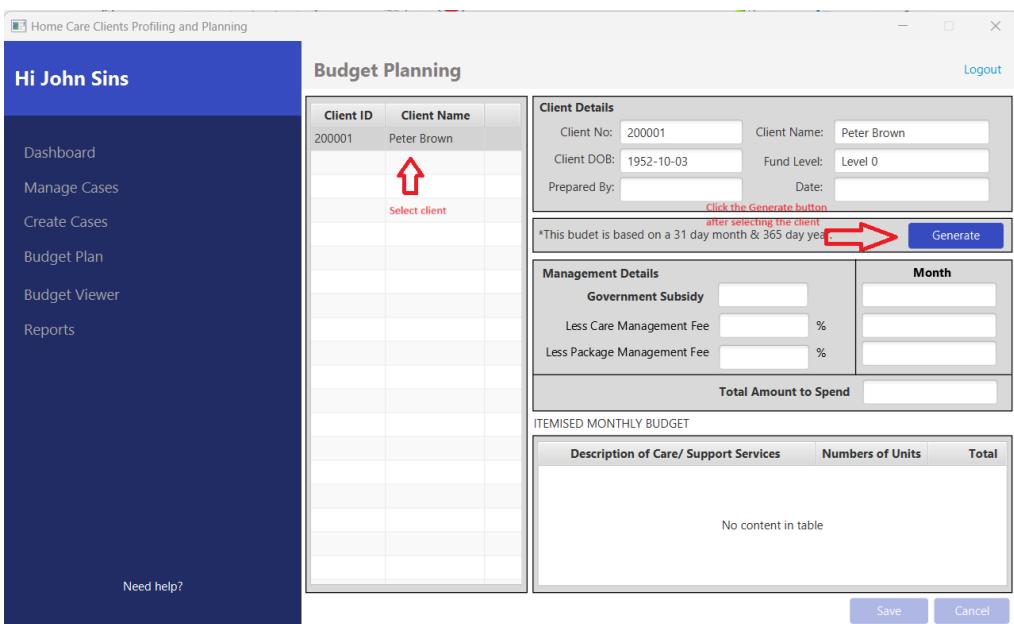


Budget Planning

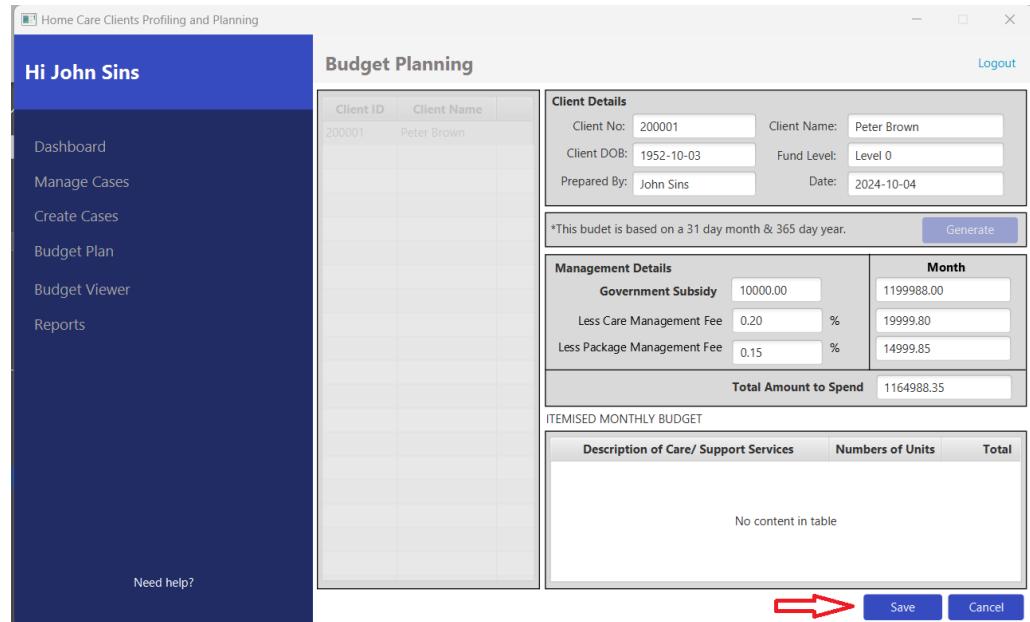
1. To create a new budget plan, navigate to the Budget Plan from the side menu.



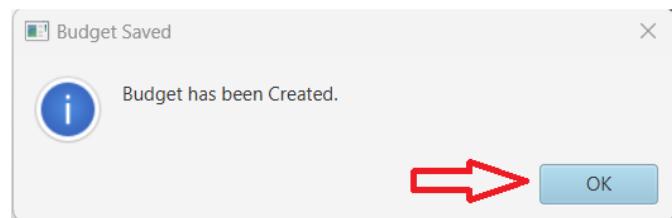
2. Select from the list of Ready for Budget clients then click on generate. This will automatically fill all the information on the screen



3. Click the save Buton to confirm the generated budget plan.



4. Prompts will be confirming the creation.



Client Services Officer (CSO)

Manage Assigned Assessments

1. To act upon the assigned cases, navigate to the My Cases tab by clicking it on the side panel menu.

The screenshot shows the software's main window with a dark blue sidebar on the left. The sidebar has a 'Hi mark adona' greeting at the top, followed by a list of navigation items: Dashboard, My Cases (with a red arrow pointing to it), Manage Clients, New Client, Budget Viewer, and Reports. At the bottom of the sidebar is a 'Need help?' link. The main content area is titled 'My Cases' and contains a table titled 'Assigned Cases'. The table has columns for Case ID, Client ID, Client Name, Case Type, Case Priority, and Case Age. One row is visible with values: 10000004, 200001, Peter Brown, New Assess..., High, 0. Below the table are two forms. The left form contains fields for Client ID (200001), First Name (Peter), Last Name (Brown), Birthday (10/3/1952), Medicare ID (1111), Contact (0411111111), and Address (Where St). The right form contains fields for Case ID (10000004) and Date, and a section for Closing Reasons with 'Confirm' and 'Cancel' buttons. In the top right corner of the main window, there is a 'Logout' link.

Closing a Case

1. For any valid reason, click on the Complete/Close button to close the case. This will require you to add Closing Reasons to prior confirming the action. Select a client first and follow the prompts

This screenshot is identical to the one above, showing the 'My Cases' tab. However, a large red arrow points from the bottom right towards the 'Complete/Close' button in the right-hand form. The rest of the interface, including the sidebar navigation and the data tables, remains the same.

2. Click on confirm button to close the case.

The screenshot shows the software's main interface. On the left is a dark sidebar with a blue header bar containing the text "Hi mark adona". The sidebar includes links for Dashboard, My Cases, Manage Clients, New Client, Budget Viewer, and Reports. Below these links is a "Need help?" button. The main area has a title "My Cases" and a sub-section titled "Assigned Cases:". It features a search bar and a "Search" button. A table displays client information: Case ID (10000006), Client ID (200004), Client Name (ew ew), Case Type (New Assess...), Case Priority (High), and Case Age (0). To the right of the table are two buttons: "Start Assessment" and "Complete/Close". Below this is another set of input fields for Client ID (200004), First Name (ew), Last Name (ew), Birthday (10/11/1951), Medicare ID (2323), Contact (0000000000), and Address (wewe@yahoo.com). To the right of these fields are "Case ID: 10000006", "Date: 2024-10-04", and a "Closing Reasons" section containing "Done Assessment". At the bottom right are "Confirm" and "Cancel" buttons. A red arrow points to the "Confirm" button.

3. A confirmation message will appear.



Making Assessments

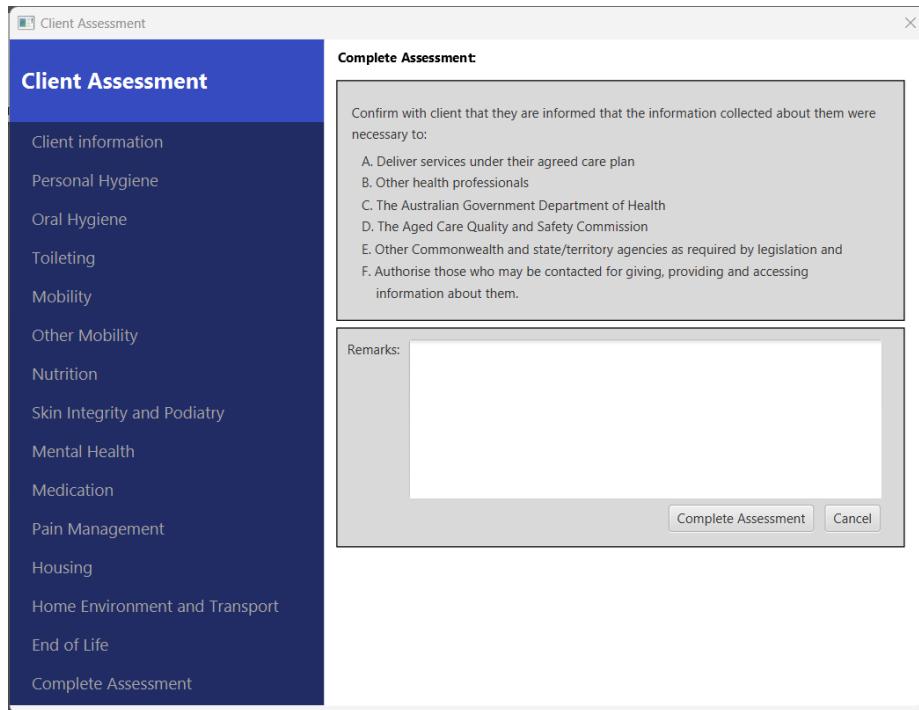
1. To proceed with the assessments, select a client entry from the table and click the Start Assessment.

The screenshot shows the 'My Cases' section of the software. On the left, there's a sidebar with options like Dashboard, My Cases, Manage Clients, New Client, Budget Viewer, and Reports. The main area shows a table titled 'Assigned Cases' with columns: Case ID, Client ID, Client Name, Case Type, Case Priority, and Case Age. One row is visible: Case ID 10000004, Client ID 200001, Client Name Peter Brown, Case Type New Assess..., Case Priority High, Case Age 0. Below this is a modal window for a client named Peter Brown (Client ID 200001). The 'Start Assessment' button is highlighted with a red arrow. The modal also contains fields for Last Name (Brown), Birthday (10/3/1952), Medicare ID (1111), Contact (0411111111), and Address (Where St).

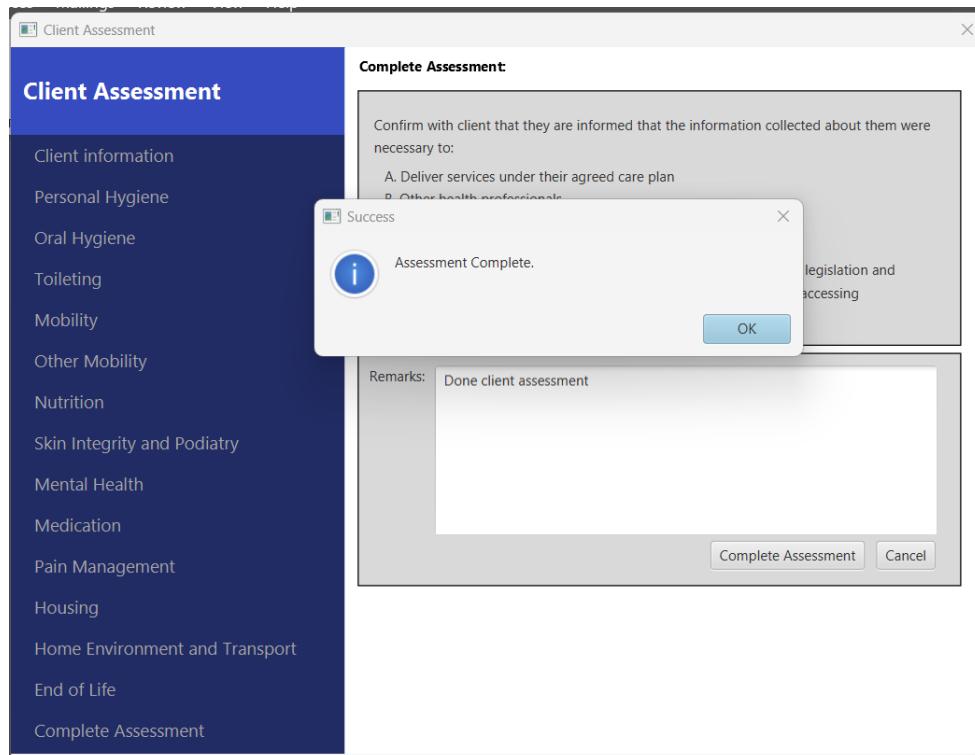
2. A new window will open which contain the client and case information. Follow the on-screen instructions to complete the assessment.

The screenshot shows the 'Client Assessment' window. The left sidebar lists various assessment categories: Client information, Personal Hygiene, Oral Hygiene, Toileting, Mobility, Other Mobility, Nutrition, Skin Integrity and Podiatry, Mental Health, Medication, Pain Management, Housing, Home Environment and Transport, End of Life, and Complete Assessment. The main area has three sections: 'Client information' (Client ID 200001, Medicare 1111, First Name Peter, Last Name Brown, Birthday 1975-02-20, Case No 10000004), 'Assessment Details' (Assessment No 202400005, Assessor mark adona, Assessment Date 10/4/2024, Venue Physically At Home), and 'Assessment Instructions' (a text box with a list of client rights and a note about information use). The 'Start Assessment' button is highlighted with a red arrow.

3. At the end of the assessment, it will require to put on some remarks prior to confirming the completion.

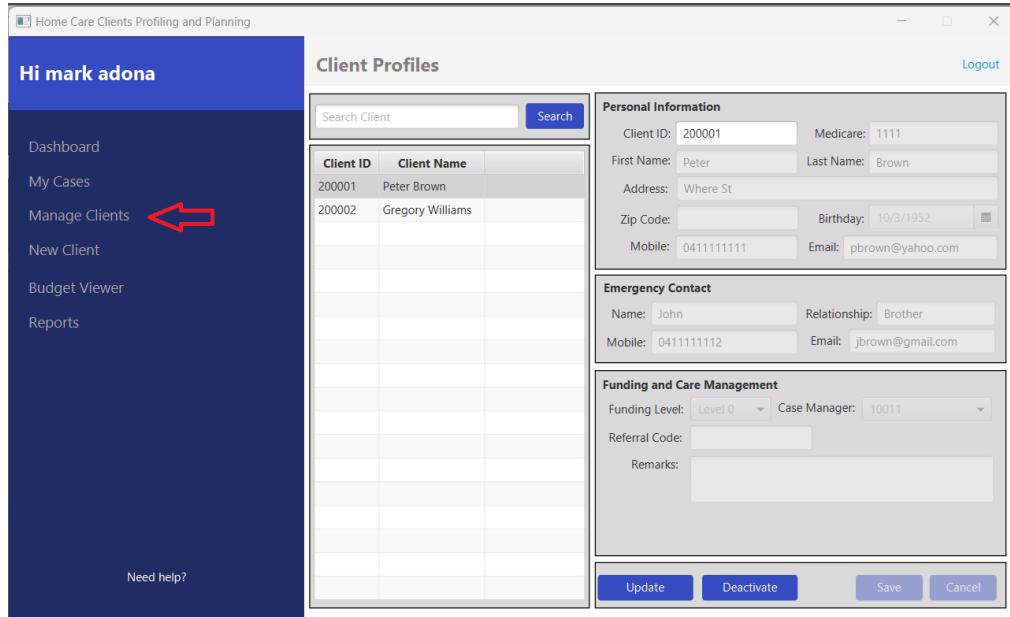


4. A dialog will pop up to confirm the successful completion of the assessment.

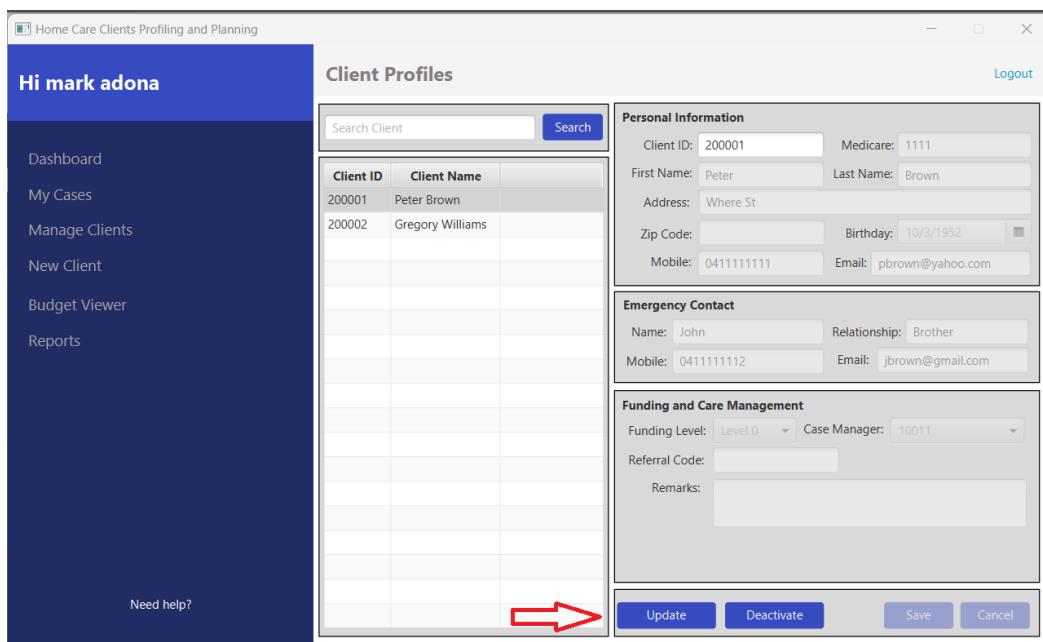


Client Profile Management

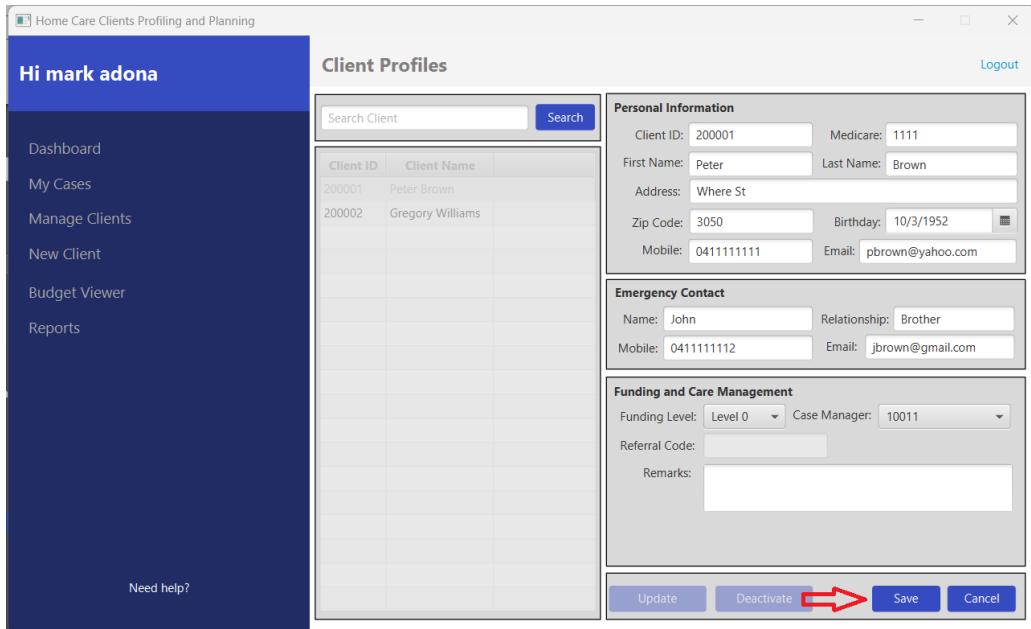
2. To update client information, navigate to the Manage Client by clicking on the left panel menu.



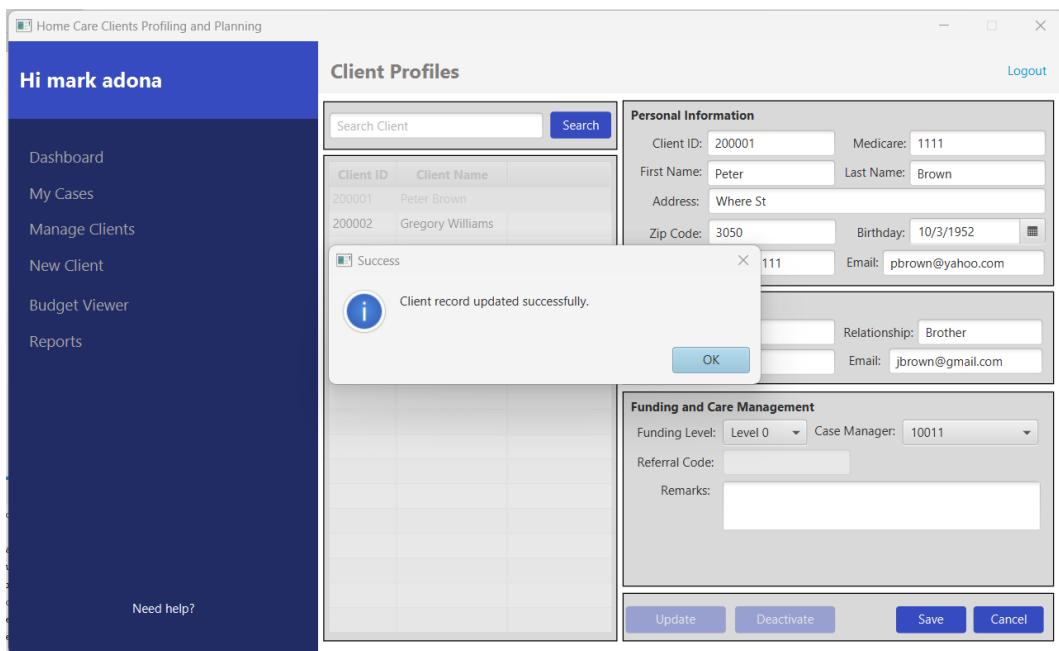
3. Select a client from the table and click on update.



4. Update the details as intended then click on save.

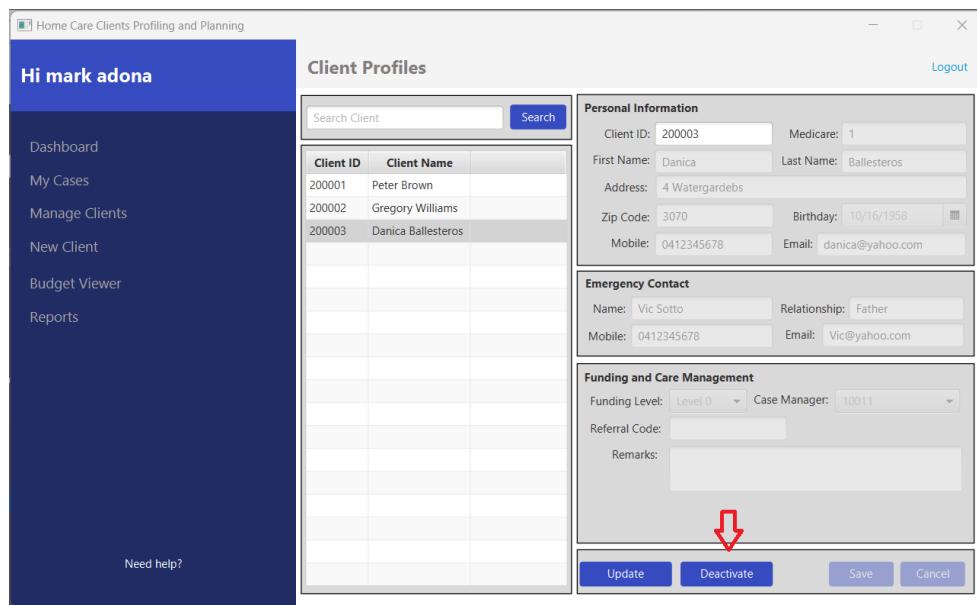


5. Follow the prompts once successful the system will confirm.

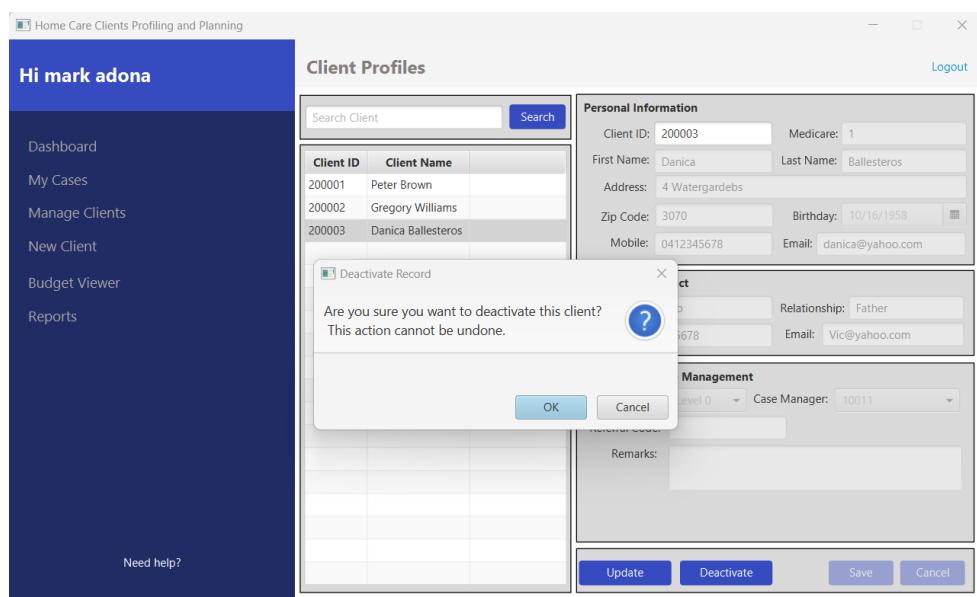


Deactivate a client

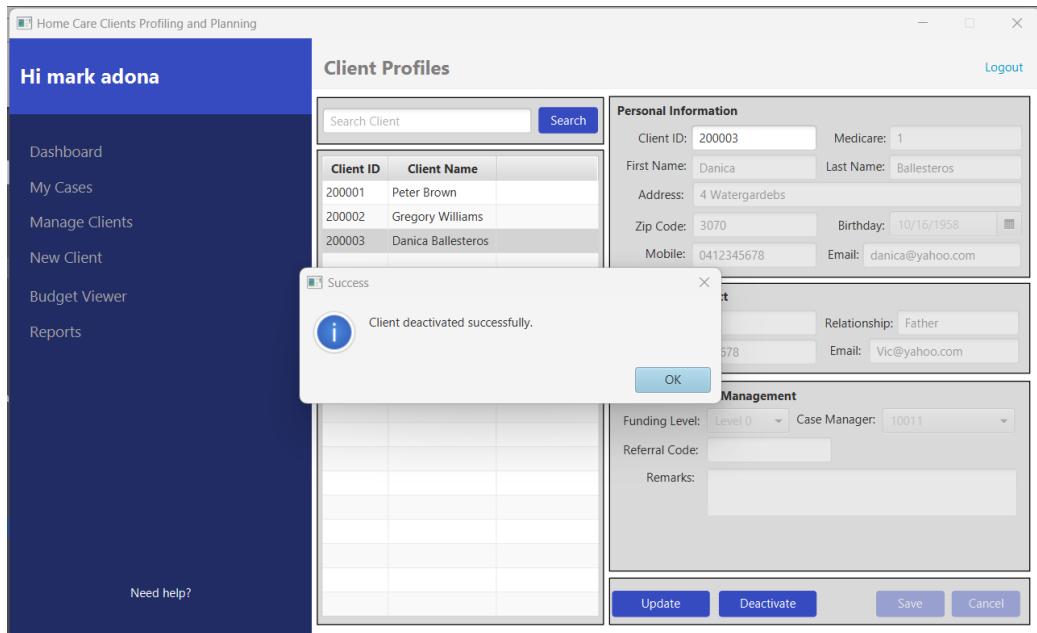
1. To deactivate a user profile, select a client from the table and click on Deactivate.



2. Follow the on-screen prompts to complete the deactivation.

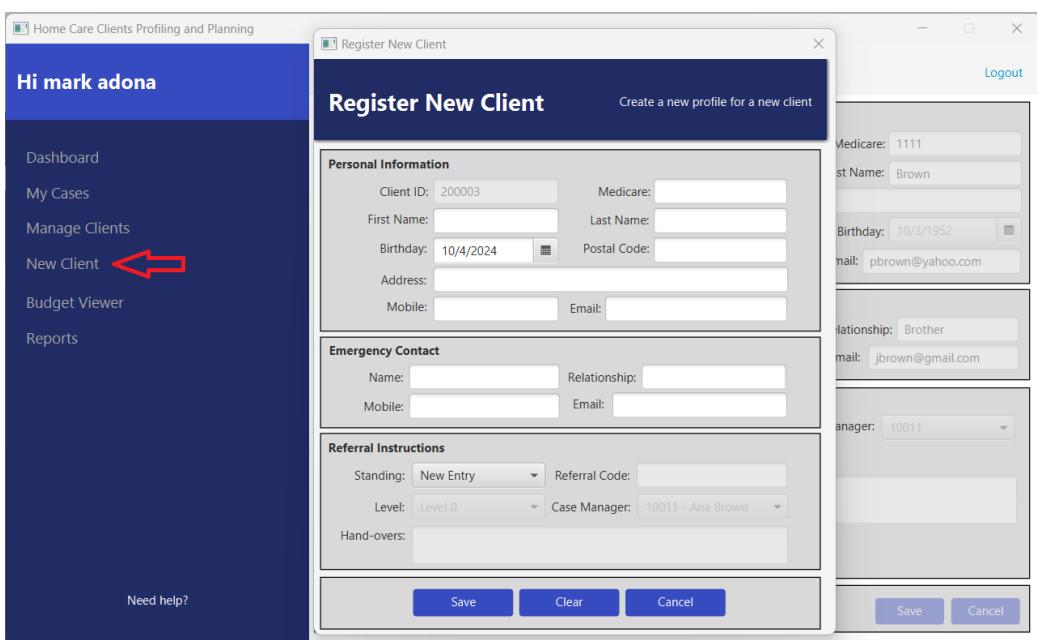


3. A deactivation confirmation will show up.



Enrol New Client

1. To enrol a new client, click on the New Client menu, a new window will open to register a new client.



2. Fill in all the required fields and follow on screen validation.

Register New Client

Create a new profile for a new client

Personal Information

Client ID:	200003	Medicare:	1
First Name:	Danica	Last Name:	Ballesteros
Birthday:	10/4/1992	Postal Code:	3070
Address:	4 Watergardebs		
Mobile:	0456124574	Email:	danica@yahoo.com

Emergency Contact

Name:	Vic Sotto	Relationship:	Father
Mobile:	04123457	Email:	Vic@yahoo.com

Referral Instructions

Standing:	New Entry	Referral Code:	
Level:	Level 0	Case Manager:	10011 - Ana Brown
Hand-overs:			

Buttons: Save, Clear, Cancel

3. Once complete, click on save to confirm changes.

Register New Client

Create a new profile for a new client

Personal Information

Client ID:	200003	Medicare:	1
First Name:	Danica	Last Name:	Ballesteros
Birthday:	10/4/1992	Postal Code:	3070
Address:	4 Watergardebs		
Mobile:	0456124574	Email:	danica@yahoo.com

Emergency Contact

Name:	Vic Sotto	Relationship:	Father
Mobile:	04123457	Email:	Vic@yahoo.com

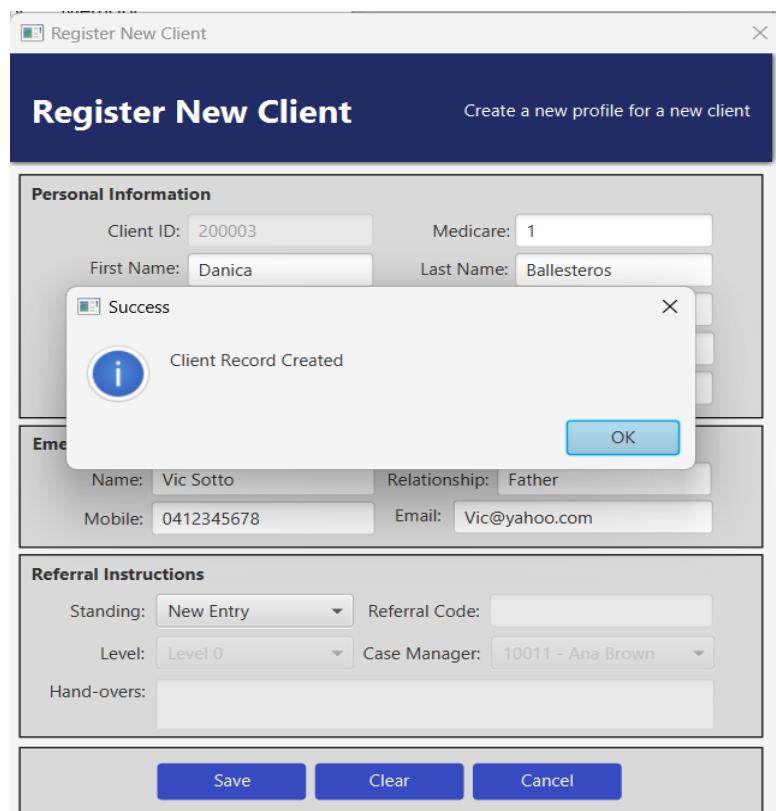
Referral Instructions

Standing:	New Entry	Referral Code:	
Level:	Level 0	Case Manager:	10011 - Ana Brown
Hand-overs:			

Buttons: Save, Clear, Cancel



4. A confirmation dialog will pop up.



Budget Viewing

1. To view the client budget, navigate to the Budget Viewing by clicking it on the side menu.

The screenshot shows the 'Home Care Clients Profiling and Planning' application interface. On the left is a dark blue sidebar with a user greeting 'Hi mark adona' and a navigation menu. The 'Budget Viewer' option is highlighted with a red arrow pointing to it. Other menu items include Dashboard, My Cases, Manage Clients, New Client, and Reports. The main content area is titled 'Client Profiles' and contains sections for 'Client Profiles' (with a search bar and table of Client ID and Client Name), 'Personal Information' (Client ID 200001, Medicare 1111, First Name Peter, Last Name Brown, Address Where St, Zip Code, Birthday 10/3/1952, Mobile 0411111112, Email pbrown@yahoo.com), 'Emergency Contact' (Name John, Relationship Brother, Mobile 0411111112, Email jbrown@gmail.com), and 'Funding and Care Management' (Funding Level Level 0, Case Manager 10011, Referral Code, Remarks). At the bottom are 'Update', 'Deactivate', 'Save', and 'Cancel' buttons.

2. This will open a new window. Select a client the view the corresponding budget.

The screenshot shows the 'Budget Viewer' application interface. On the left, there is a list of clients with their IDs and names:

Client ID	Client Name
200001	Peter Brown
200002	Gregory Williams

On the right, 'Client Details' are displayed for Peter Brown:

Client No:	200001	Client Name:	Peter Brown
Client DOB:	1952-10-03	Fund Level:	Level 0
Prepared By:	Ana Brown	Date:	2024-10-03

A note states: "This budget is based on a 31 day month & 365 day year."

Management Details

Government Subsidy	10000.00	Month	1199988.00
Less Care Management Fee	0.15	%	19999.80
Less Package Management Fee	0.20	%	14999.85
Total Amount to Spend		1164988.35	

ITEMISED MONTHLY BUDGET

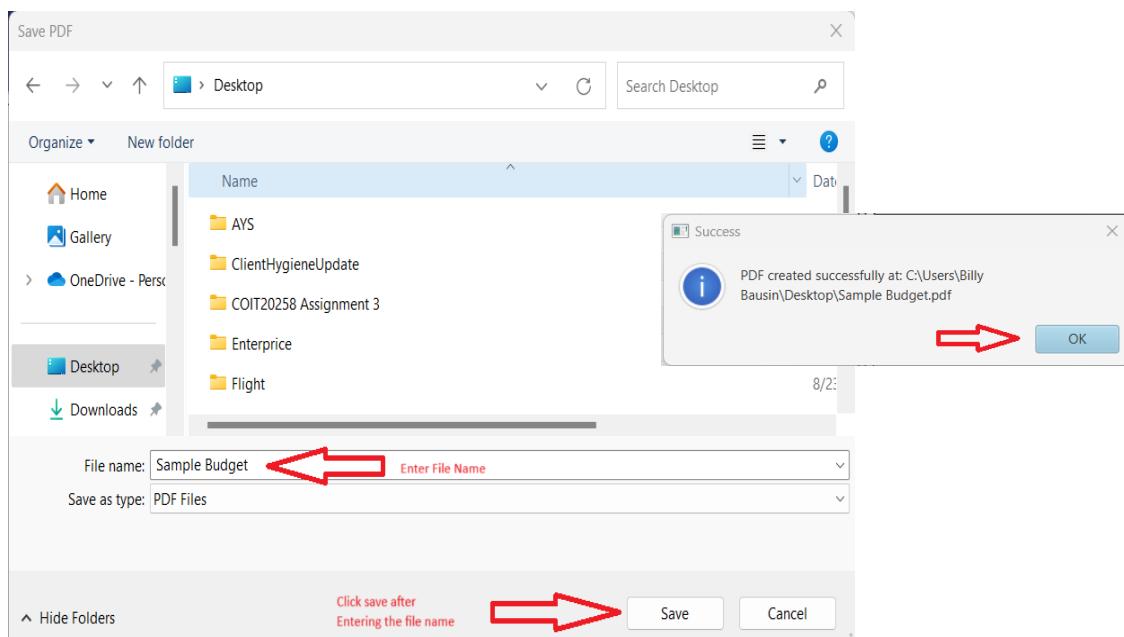
Description of Care Services	Numbers of Units	Total
Domestic Assistance1	3	201.0
Transport Assistance	3	201.0

Total Expenses: 402.00 Extract Print

3. To extract the budget to PDF, click on extract button and follow the steps in the new window that will locate the file saving and to name the file. (Locate and name the file as intended)

The first screenshot shows a confirmation dialog box asking if you want to proceed with generating the budget PDF. The 'OK' button is highlighted with a red arrow.

The second screenshot shows the resulting PDF document titled 'Budget Viewer' with the same client details, management details, and itemised monthly budget as the original application screen.



The screenshot shows a file explorer window titled 'Sample DB' and a PDF viewer window. In the file explorer, a file named 'Sample Budget' is listed in the 'Sample DB' folder. A red arrow points to this file. The PDF viewer window displays a budget plan document. The header of the document reads 'Sample Company Home Care Provider' and '120 Spencer St, Melbourne VIC 3000'. The 'BUDGET PLAN:' section includes the following details:

Client Number:	200001
Client Name:	Peter Brown
Assessed Level:	Level 0
Date of Birth:	1952-10-03

The 'Management Details:' section lists subsidies and fees:

Government Subsidy:	10000.00
Care Management Fee:	0.15
Package Management Fee:	19999.80

The 'Expenses / Services:' section shows the breakdown of costs:

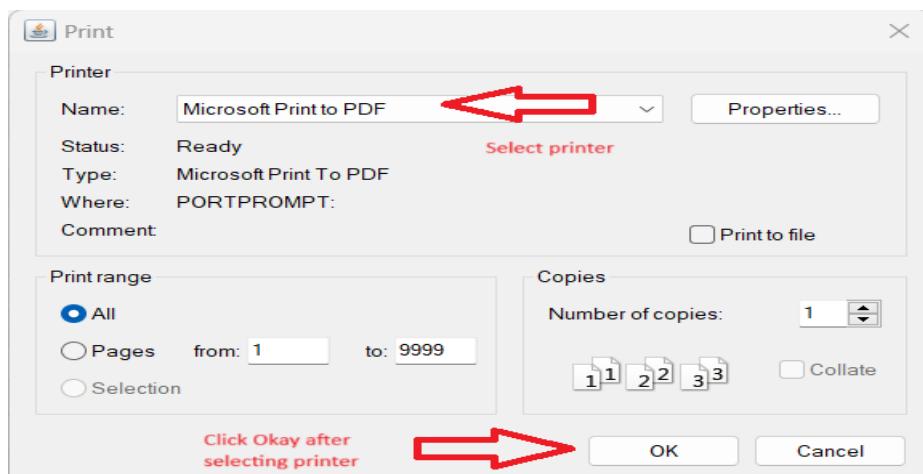
Services	Units	Cost
Domestic Assistance	1	\$201.00
Transport Assistance	3	\$201.00
Total Expenses:		\$402.00

At the bottom of the PDF viewer, it says 'Prepared by: Ana Brown' and 'Date Created: 2024-10-03'.

4. To print the budget, click on the print button and follow the on-screen print instructions.

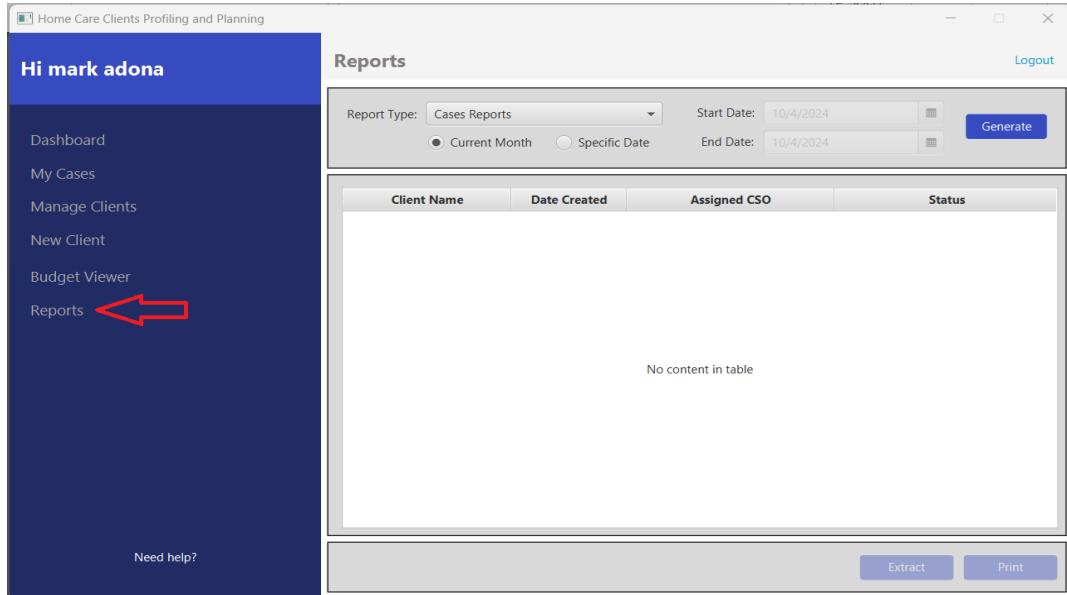
The left screenshot shows the main Budget Viewer interface with client details, management fees, and an itemized monthly budget table. A red arrow points to the 'Print' button at the bottom right of the main window.

The right screenshot shows a 'Confirmation' dialog box asking if the user wants to proceed with printing. It lists the total amount (1164988.35) and provides 'OK' and 'Cancel' buttons. A red arrow points to the 'OK' button.

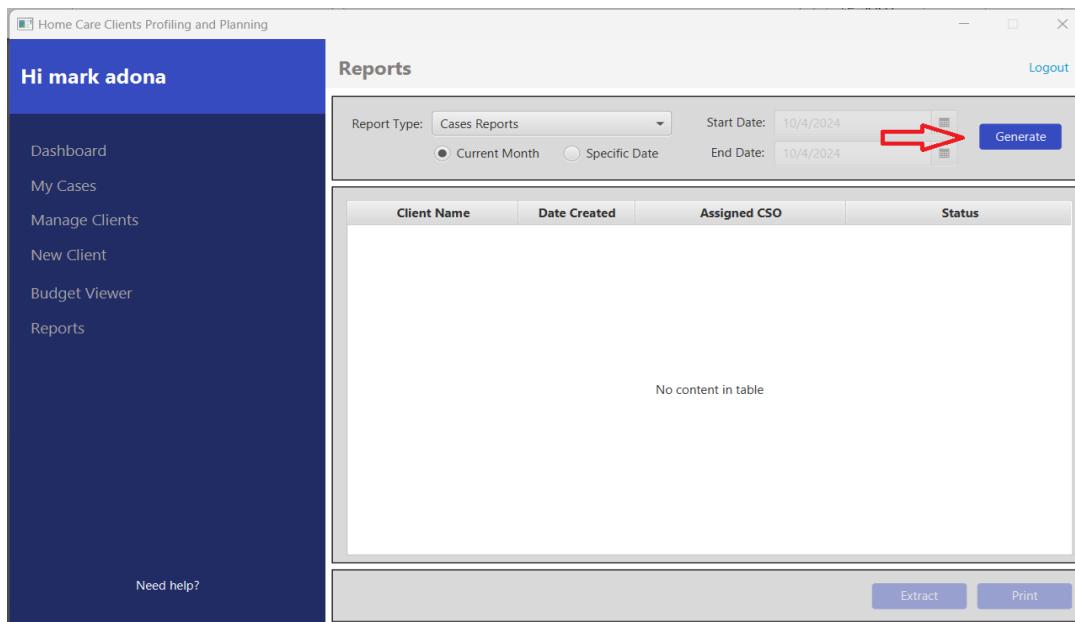


Reports Generation

1. To generate a report, click on the Reports on the left side panel menu.



2. Select which type of report that is intended to generate then click on generate.



3. Options for custom reports is also available depending on the report type.

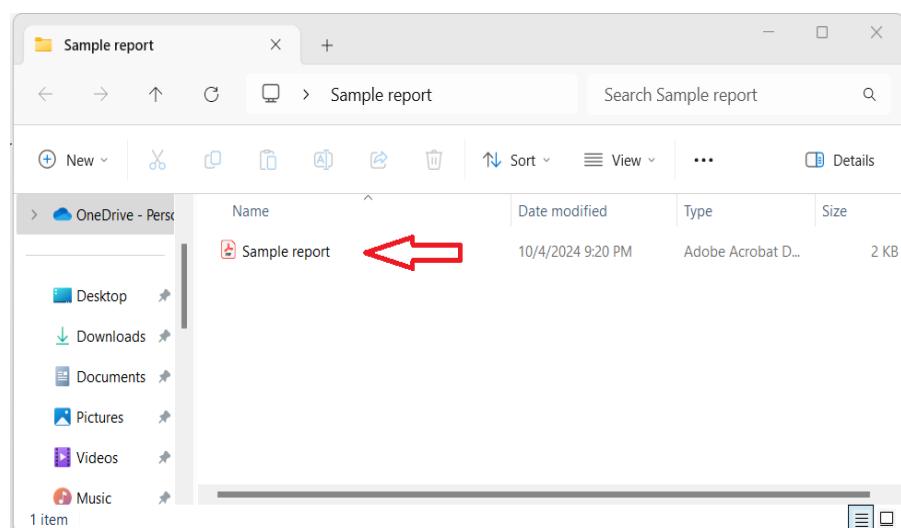
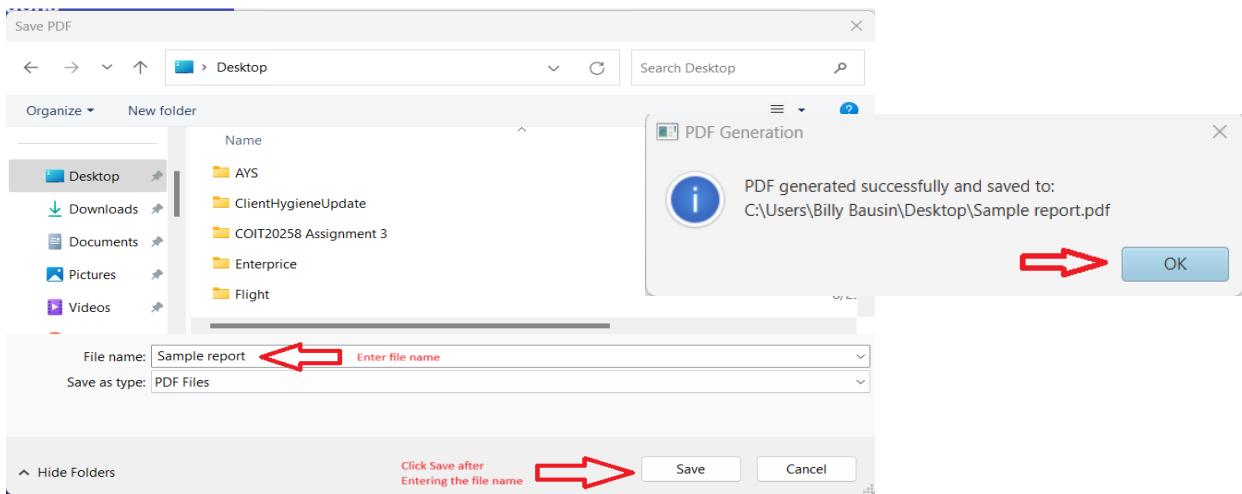
The screenshot shows a software application window titled "Home Care Clients Profiling and Planning". The left sidebar has a dark blue header "Hi mark adona" and a list of navigation items: Dashboard, My Cases, Manage Clients, New Client, Budget Viewer, Reports, and Need help?. The main content area is titled "Reports" and contains a table with the following data:

Client Name	Assessment Date	Assigned CSO	Remarks
Peter Brown	2024-10-03	Ben Ben	
Peter Brown	2024-10-03	Ben Ben	
Gregory Williams	2024-10-03	Ben Ben	
Gregory Williams	2024-10-03	Ben Ben	
Peter Brown	2024-10-04	mark adona	Done client assessment

At the bottom right of the report area are two buttons: "Extract" and "Print".

4. To extract the report to PDF, click on extract button and follow the steps in the new window that will locate the file saving and to name the file. (Locate and name the file as intended)

This screenshot is identical to the one above, showing the "Reports" table. A red arrow points to the "Extract" button located at the bottom right of the report area.



A screenshot of a PDF viewer window displaying a report from 'Sample Company Home Care Provider'. The report details cases from October 3rd to October 4th, 2024. It includes a table of client names, dates, assigned CSOs, and statuses, and a summary section.

Report Details:

Report: Cases Reports
Date Coverage: 2024-10-04 to 2024-10-04

Client Data:

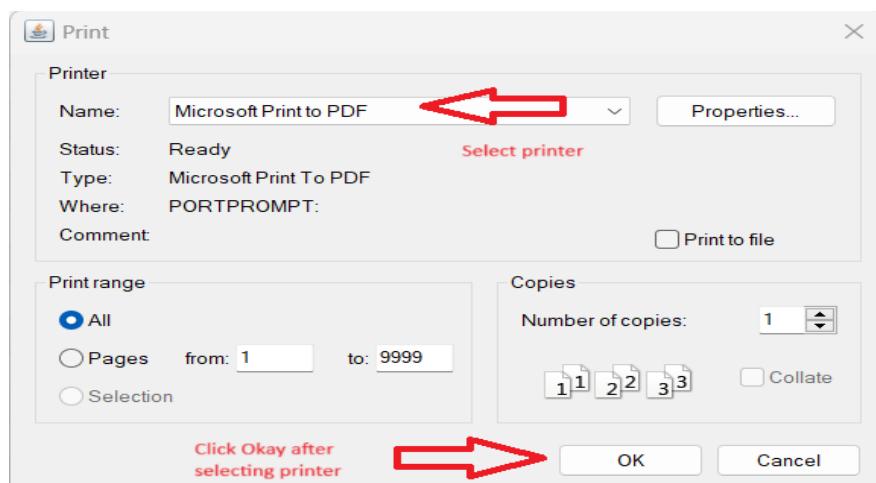
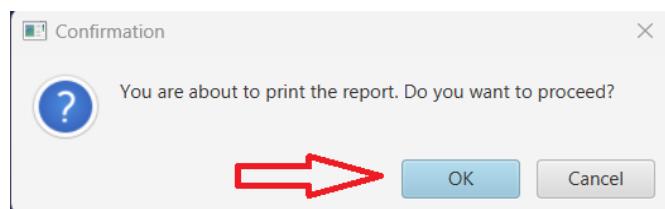
Client Name	Date Created	Assigned CSO	Status
Peter Brown	2024-10-03	Ben Ben	Closed
Peter Brown	2024-10-03	Ben Ben	Open
Peter Brown	2024-10-04	mark adona	Complete

Summary:
Total Records: 3
Generated by: mark adona
Generated on: 2024-10-04

5. To print the report, click on the print button and follow the on-screen print instructions.

The screenshot shows the software's main window with a sidebar on the left containing links like Dashboard, My Cases, Manage Clients, New Client, Budget Viewer, and Reports. The central area is titled 'Reports' and displays a table with columns: Client ID, Client Name, Birthday, Level, and Medicare. The table contains four rows of sample data. At the bottom right of the report area is a blue 'Print' button, which has a red arrow pointing to it from below.

Client ID	Client Name	Birthday	Level	Medicare
200001	Peter Brown	1952-10-03	Level 0	1111
200002	Gregory Williams	1948-10-20	Level 2	1234
200003	Danica Ballesteros	1958-10-16	Level 0	1
200004	ew ew	1951-10-11	Level 0	2323



5.3 System Administrator

User Management

1. Navigate to Manage Users from the left panel menu.

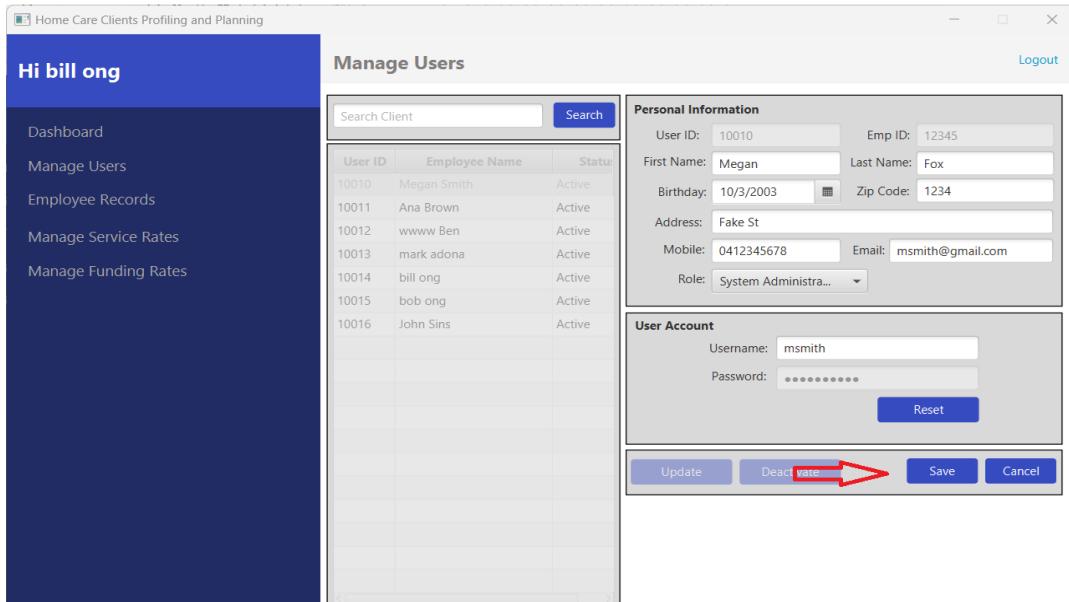
Log ID	Time Stamp	Log Details
1	2024-10-04 21:16:14	An Assessment Report has been generated
2	2024-10-04 21:21:23	Megan Smith have successfully logged-in
3	2024-10-04 21:21:45	Assessment Report has been extracted and saved to C:\Users\Billy Bausin\Desktop\Sample
4	2024-10-04 21:21:57	Megan Smith have successfully logged-in
5	2024-10-04 21:22:31	Megan Smith have successfully logged-in
6	2024-10-04 21:23:13	An Assessment Report has been generated
7	2024-10-04 21:23:29	Assessment Report has been extracted and saved to C:\Users\Billy Bausin\Desktop\Sample
8	2024-10-04 21:23:43	A Case Report has been generated
9	2024-10-04 21:23:56	Cases Report has been extracted and saved to C:\Users\Billy Bausin\Desktop\Sample repo
10	2024-10-04 21:24:10	A Client Report has been generated
11	2024-10-04 21:24:29	Client Report has been extracted and saved to C:\Users\Billy Bausin\Desktop\Sample DB\S
12	2024-10-04 21:24:37	A Client Report has been generated
13	2024-10-04 21:25:21	Megan Smith have successfully logged-in
14	2024-10-04 21:28:23	mark adona have successfully logged-out

Update User Data

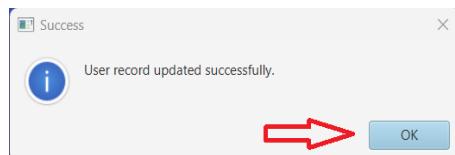
2. Select from the user list the profile that you wish to update then click the Update Button. This will allow managing the client details.

User ID	Employee Name	Status
10010	Megan Smith	Active
10011	Ana Brown	Active
10012	www Ben	Active
10013	mark adona	Active
10014	bill ong	Active
10015	bob ong	Active
10016	John Sins	Active

3. Click on save to confirm changes

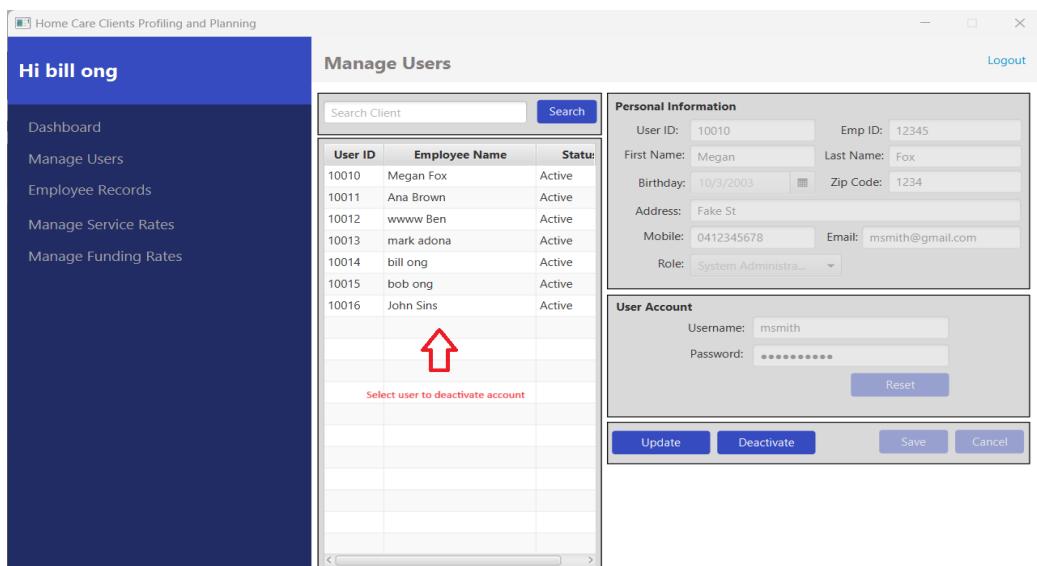


4. A confirmation pop will show.

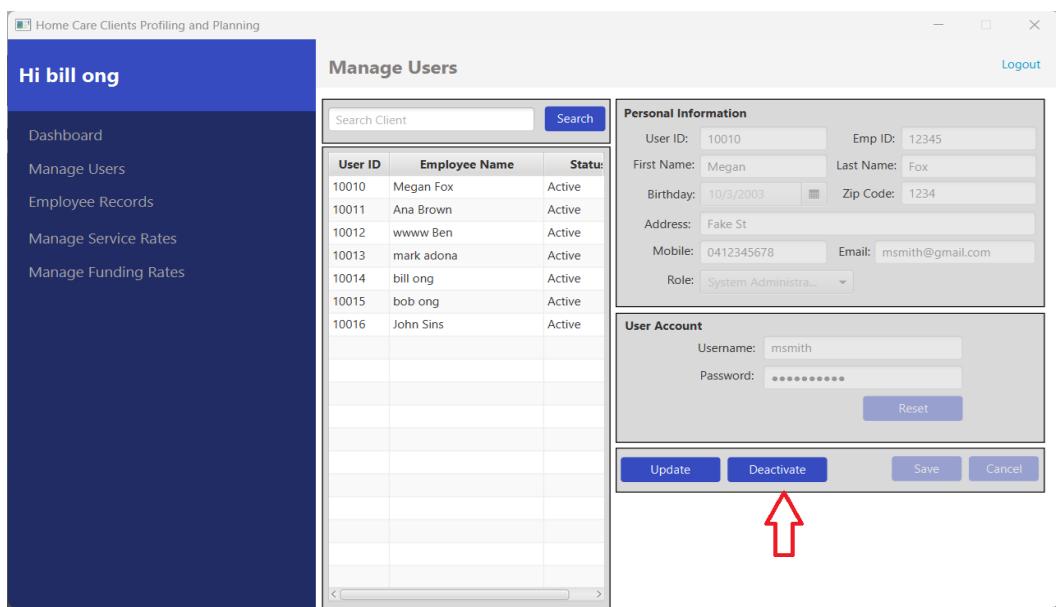


Deactivate a User

1. To deactivate an account, select from the user list the profile that you wish to deactivate.

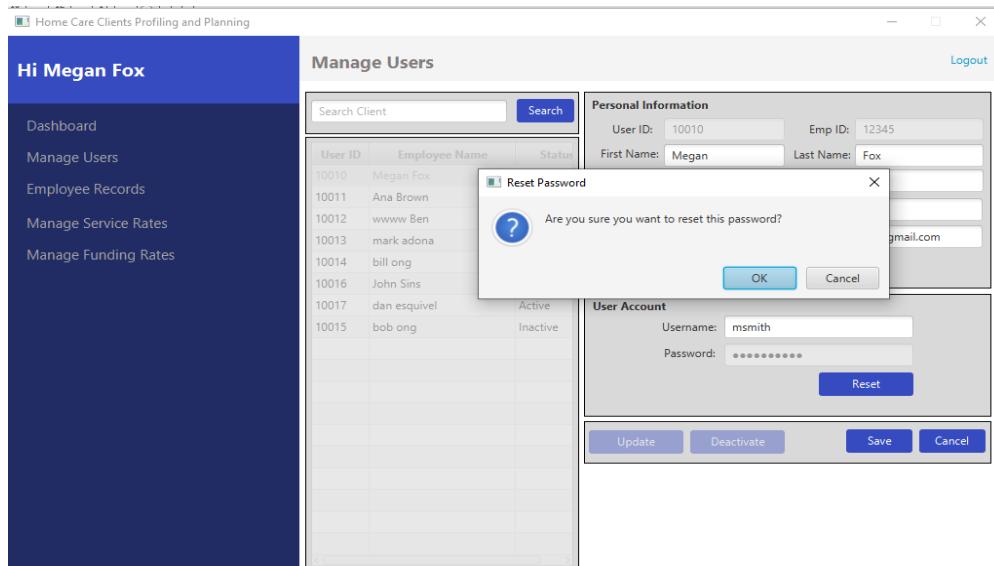


2. Then click the Deactivate Button. Follow the on-screen instruction to confirm deactivation.

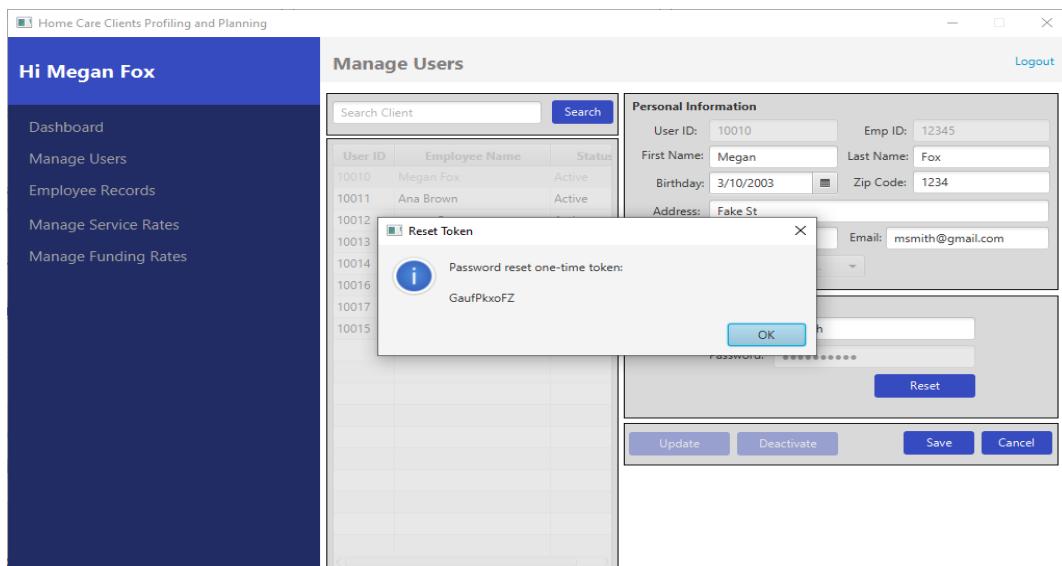


Password Reset

1. To reset the password, select from the user list the profile then click on Update button then click Reset Button.



2. This will generate a onetime key which will be used by the user to change their password.



Employee Management

1. To retire an employee on record, click on the Employee Record on the left panel menu.

The screenshot shows the 'Manage Employee Records' page. On the left, a sidebar menu lists 'Employee Records' with a red arrow pointing to it. The main content area displays a table of employee records with columns: Employee ID, Employee Name, Employment Status, Start Date, and End Date. Below the table are buttons for 'Retire', 'Add Employee', and 'Bulk Upload'. At the bottom are 'Manually Add Employee' and 'Bulk Upload Employee Data' sections, and buttons for 'Save', 'Cancel', 'Upload', and 'Cancel'.

Employee ID	Employee Name	Employment Status	Start Date	End Date
1	Patr1	Inactive	2024-10-03	2024-10-03
2	Ana	Active	2018-10-24	Employed
123	bill	Active	2024-10-04	Employed
1234	Bob	Active	2024-10-04	Employed
43211	Dan	Active	2024-10-04	Employed
112233	John	Active	2024-10-04	Employed
110000026	Michael Brown	Active	2020-07-20	Employed
110000027	Sarah Taylor	Active	2021-11-10	Employed
110000028	David Wilson	Active	2019-04-14	Employed
110000029	Laura Martinez	Active	2020-12-05	Employed

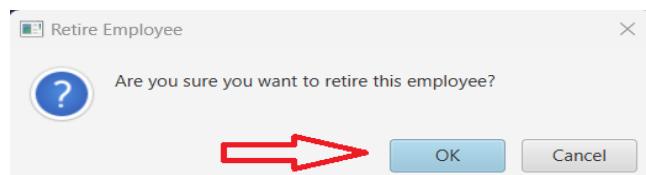
2. Select an employee from the list that you wish to deactivate.

The screenshot shows the same 'Manage Employee Records' page as the previous one, but now the 'Employee Records' menu item in the sidebar is selected, indicated by a red arrow. The rest of the interface is identical to the first screenshot.

3. Click on retire then follow the on-screen instructions

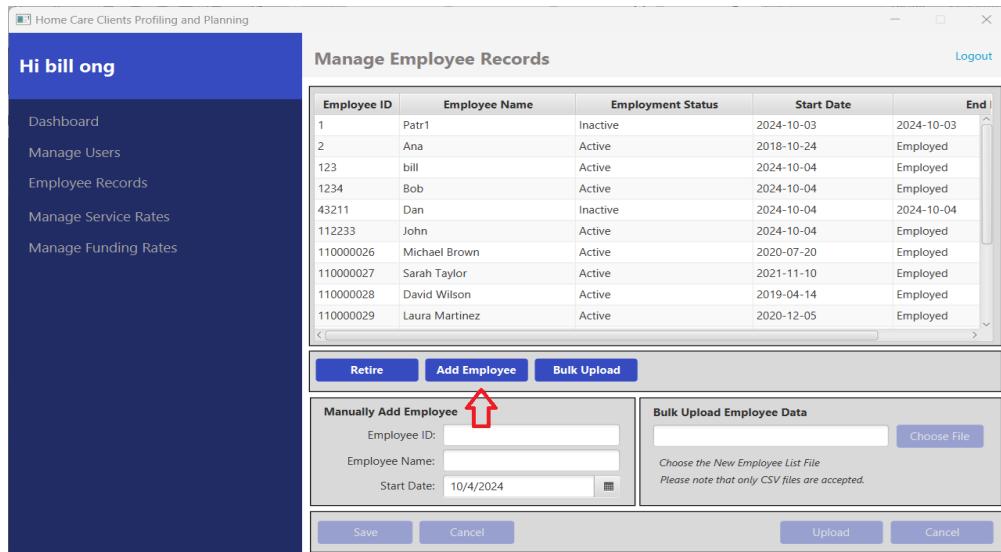
The screenshot shows the 'Manage Employee Records' interface. On the left is a sidebar with navigation links: Dashboard, Manage Users, Employee Records, Manage Service Rates, and Manage Funding Rates. The main area displays a table of employee records with columns: Employee ID, Employee Name, Employment Status, Start Date, and End Date. A red arrow points to the 'Retire' button located at the bottom of the table's toolbar.

Employee ID	Employee Name	Employment Status	Start Date	End Date
1	Patr1	Inactive	2024-10-03	2024-10-03
2	Ana	Active	2018-10-24	Employed
123	bill	Active	2024-10-04	Employed
1234	Bob	Active	2024-10-04	Employed
43211	Dan	Active	2024-10-04	Employed
112233	John	Active	2024-10-04	Employed
110000026	Michael Brown	Active	2020-07-20	Employed
110000027	Sarah Taylor	Active	2021-11-10	Employed
110000028	David Wilson	Active	2019-04-14	Employed
110000029	Laura Martinez	Active	2020-12-05	Employed

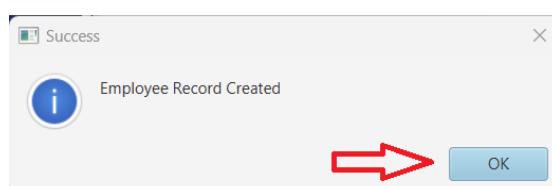
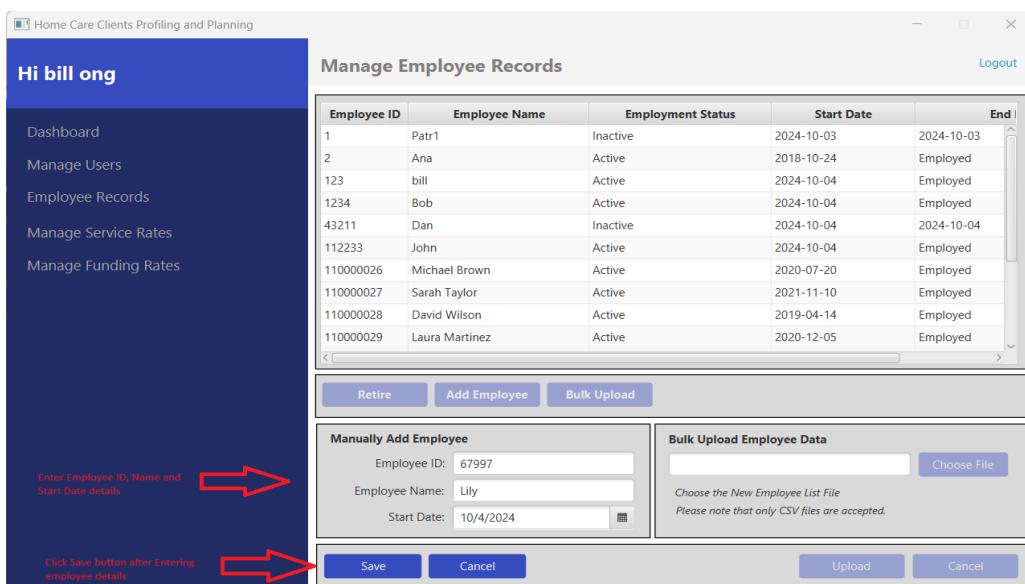


Manual Adding of Employee

1. To manually add an employee on record, click on Add Employee.

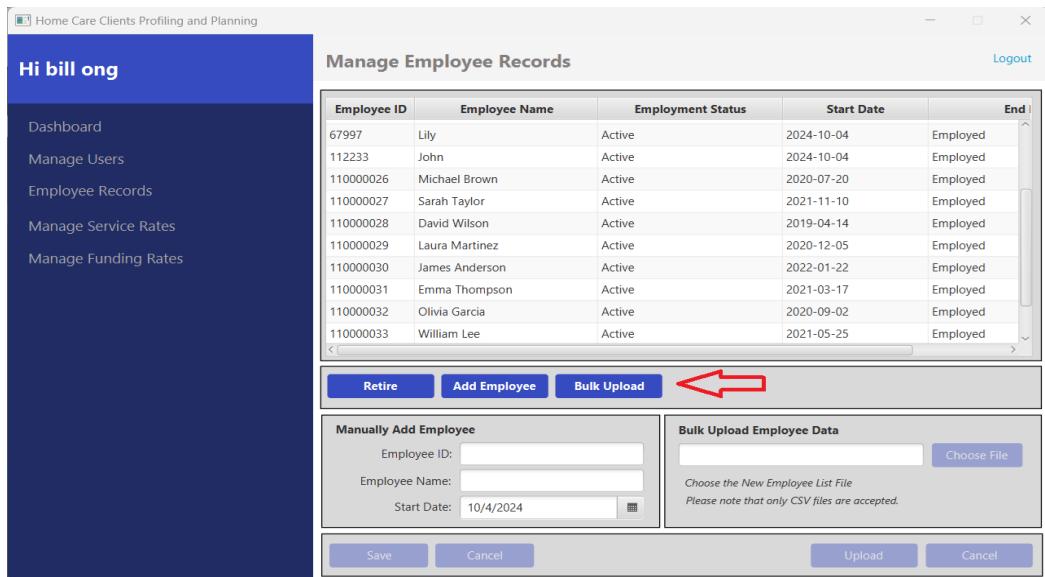


2. This will allow input of single employee on the record. click on Save to confirm record enrolment.

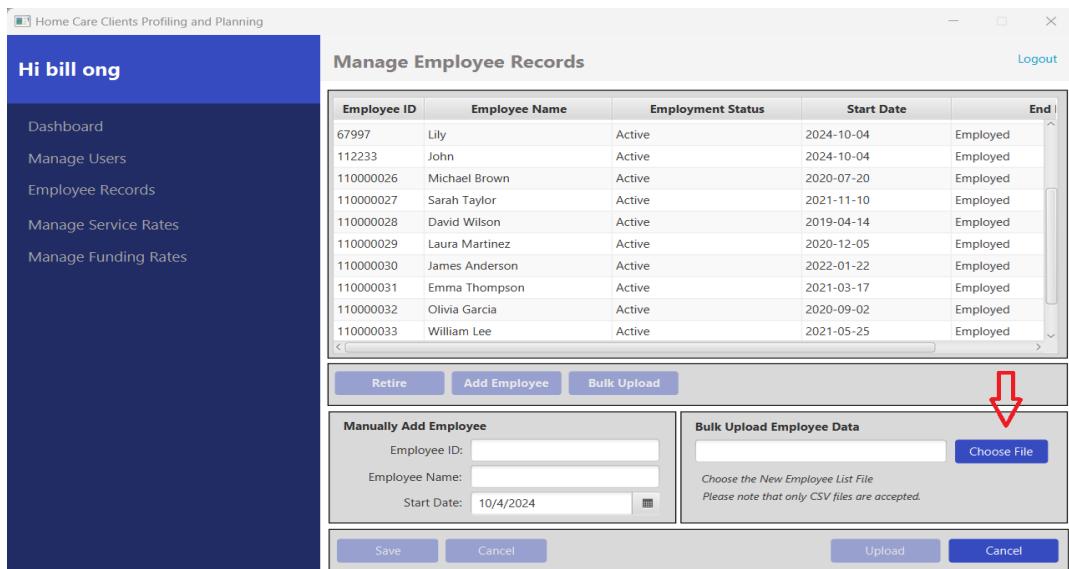


Bulk Adding of Employee

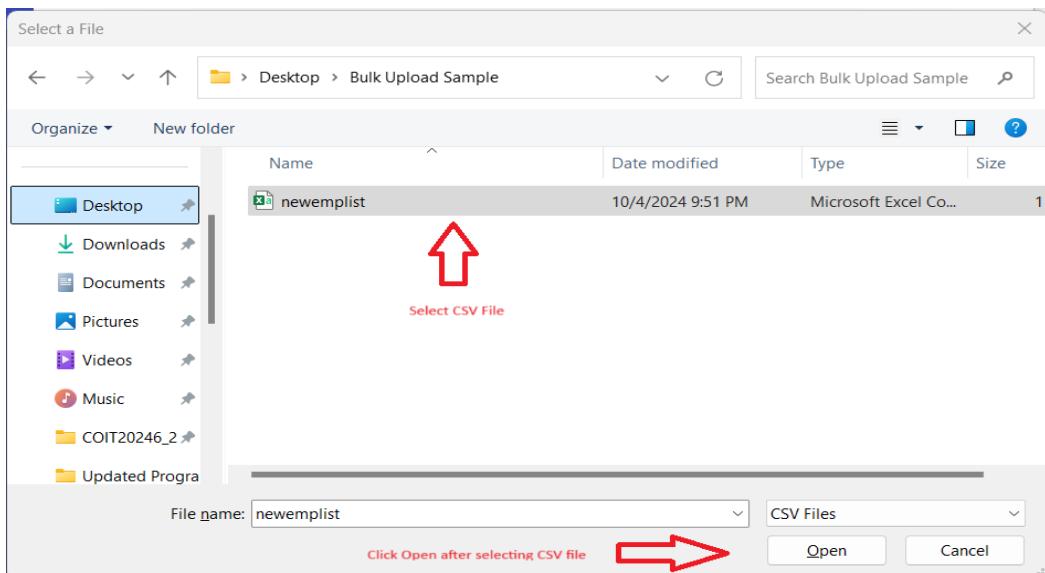
1. To import an alphalist, click on the Bulk Upload Button, this will allow uploading of a CSV file that contains employee record.



2. Click on choose file to choose a file to upload



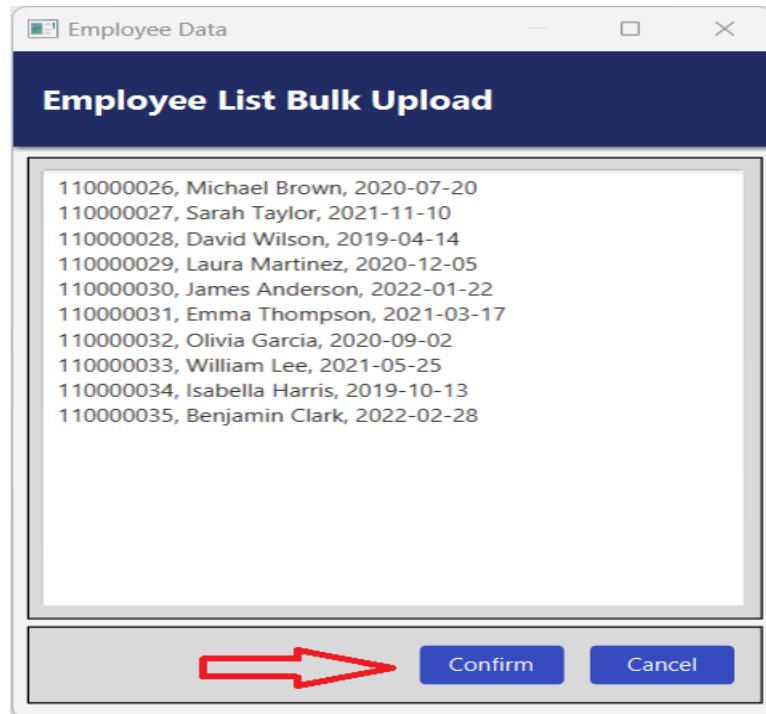
3. Choose the file from the windows explorer.



4. Then click on Upload.

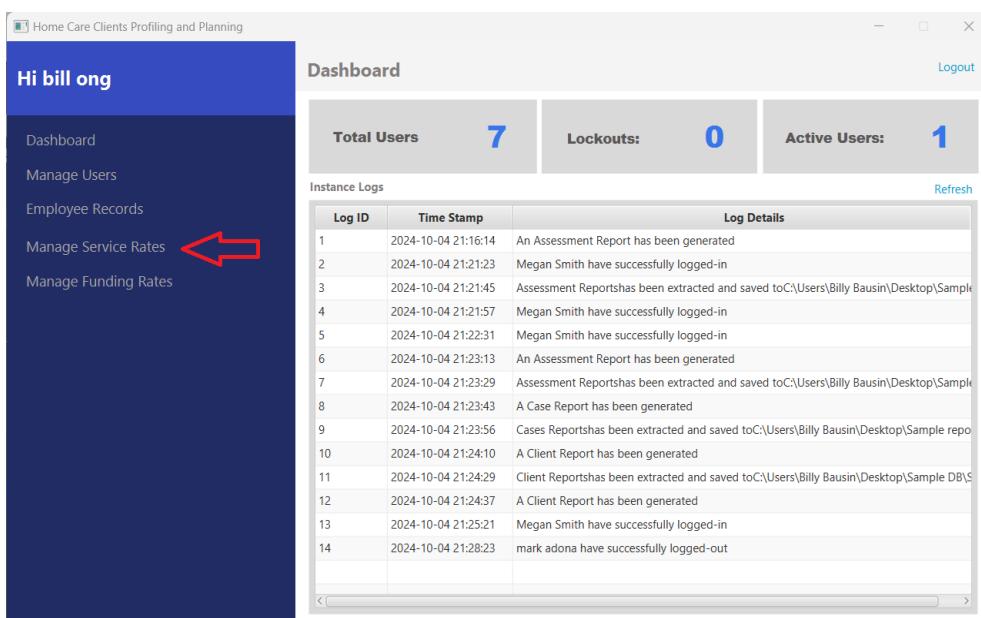
A screenshot of the "Manage Employee Records" page from a web application. The left sidebar shows navigation links: Dashboard, Manage Users, Employee Records, Manage Service Rates, and Manage Funding Rates. The main content area is titled "Manage Employee Records". It displays a table of employee records with columns: Employee ID, Employee Name, Employment Status, Start Date, and End Date. The table lists 11 employees. Below the table are three buttons: "Retire", "Add Employee", and "Bulk Upload". The "Bulk Upload" button is highlighted with a red arrow. In the bottom right corner of the page, there are two buttons: "Save" and "Upload". The "Upload" button is also highlighted with a red arrow.

- This will open a new window showing the content of the file. Click on confirm to continue processing bulk upload,



Manage Service Rates

- To update the Service Rates, click on the side panel menu.



2. In the new window, update the record directly on the screen. Press the Enter Key in every updated entry to ensure that data will be kept and validated. Once done, click on the save button to confirm update. Then follow the on-screen instructions.

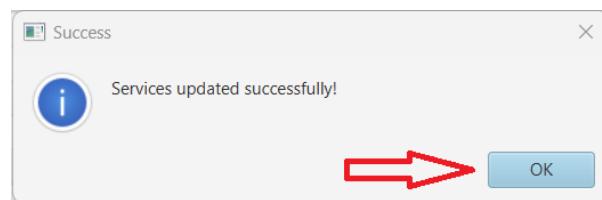
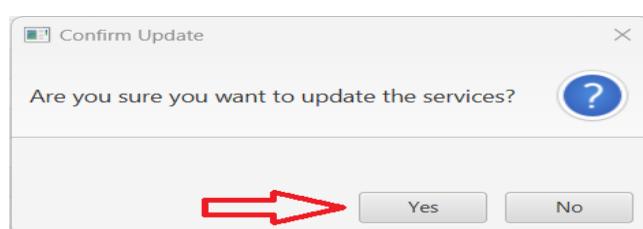
Services Offered

Services Cost Adjustments

Service ID	Service Description	Rate
CA	Community Access	67.0
CM	Care Management	0.2
DA	Domestic Assistance1	67.0
KM	Kilometre Allowance	1.4
MP	Meal Preparation	67.0
PCA	Personal Care Assistance	67.0
PM	Package Management	0.15
SSG	Social Support	100.0
TA	Transport Assistance	67.0

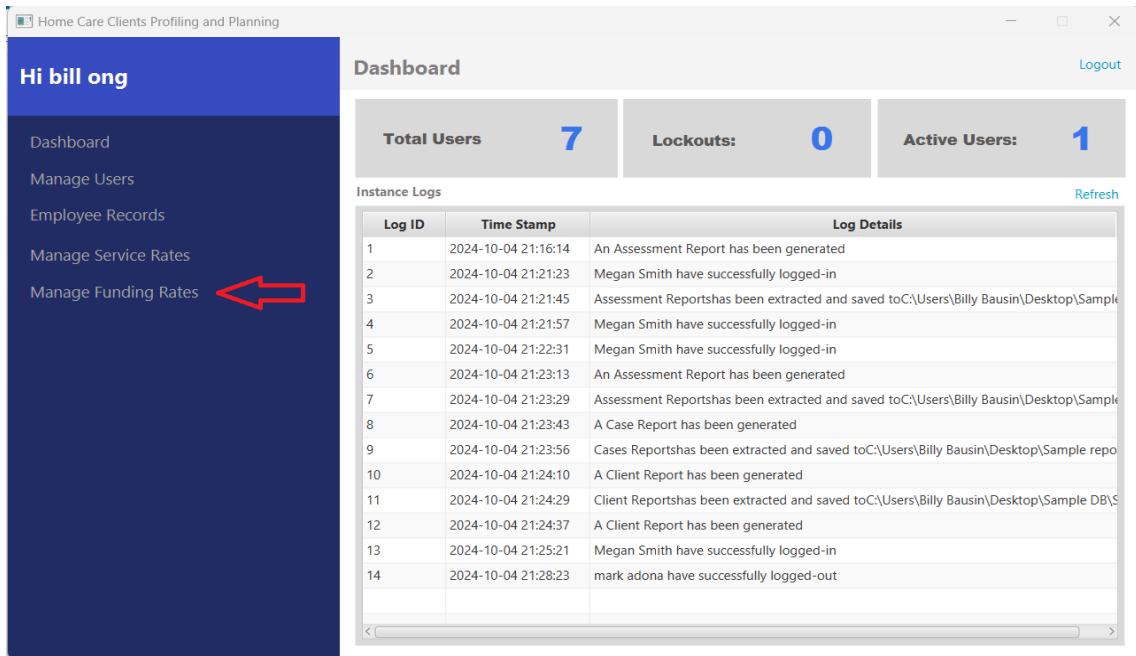
Select Service to update then press Enter key

Click the save button after updating the service   



Manage Funding Rates

1. To update the Funding Rates, click on the side panel menu.

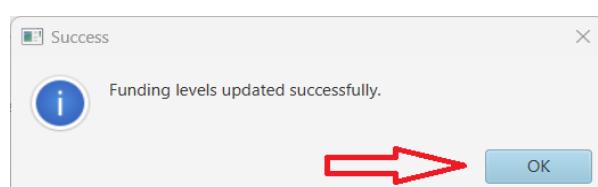


2. In the new window, update the record directly on the screen. Press the Enter Key in every updated entry to ensure that data will be kept and validated. Once done, click on the save button to confirm update. Then follow the on-screen instructions.

The dialog box is titled 'Funding Level Adjustments'. It contains a table with four columns: Level ID, Daily Rate, Fortnightly Rate, and Monthly Rate. The table data is as follows:

Level ID	Daily Rate	Fortnightly Rate	Monthly Rate
Level 0	10000.0	1000000.0	99999.0
Level 1	29.01	406.14	812.28
Level 2	51.02	714.28	1428.56
Level 3	111.04	1554.56	0.0
Level 4	168.33	2356.62	4713.24

Below the table is a note: 'Select Rates to update and press Enter key'. At the bottom are 'Save' and 'Cancel' buttons, with a red arrow pointing to the 'Save' button.



6. Error Messages

The system will display pop-up error messages when users encounter specific issues during their workflow. These error messages will immediately notify the user of any problems, providing instructions on how to address them. Error messages will appear in the following situations:

- **Failed login attempts:** If the user fails to log in after several attempts, an error message will appear, indicating the need to contact the **System Administrator** for a password reset.
- **Budget or care plan discrepancies:** When there are inconsistencies or errors in the budget or care plans, an error message will pop up, alerting the user to review and correct the information.
- **System updates or new feature releases:** When the system requires an update or a new feature is introduced that may affect user functionality, an error message will notify users of required actions (e.g., restarting the application).

These error messages will pop up as soon as the issue is detected, ensuring that users can address problems in real time. Once the issue is resolved, the message will automatically close or provide an option for users to proceed.

7. Troubleshooting

7.1 Common Issues

1. **Login Failures:**
 - Ensure correct username and password are used.
 - If you exceed the login attempt limit, contact your system administrator to reset your password.
2. **Case Assignment Errors:**
 - Make sure the CSO is registered in the system before assigning cases.
3. **System Performance Issues:**
 - If the system becomes slow or unresponsive, restart the application or your computer.

For any other issues, contact your system administrator.