# Chocoholics Anonymous User Manual

# Initial Usable Values

Provider Numbers: 999999999, 121212121, 123456789, 987654321, 385393502, 834592176, 609384215, 725109384, 481236790, 573892614

Operator Numbers:  999999999, 232323232, 876876876, 343412121, 248975361, 697813254, 530964187, 814326509, 672148935, 395210846

Manager Numbers: 999999999, 323232323, 454454454, 155155155, 729183465, 604512837, 851937624, 463298571, 318746952, 975624183

Valid Member Numbers: 999999999, 555555555, 666666666, 777777777, 572943618, 689175432, 427356189, 836914257, 514287963, 293861745

Suspended Member Numbers: 999999998, 555555554, 455555555, 899999999, 476819325, 825634197, 391547682, 648273519, 752198364, 913462875

Service Codes: 999999, 555555, 666666, 777777, 718245, 392857, 564213, 987634, 126489, 573916

# Table of Contents

# SQL Initialization

Upon your first execution of this project, you will be presented with this screen.



In the first text box enter the name of your SQL Server. Please enter the name exactly as it is, if there are escape characters they will be handled. In the second text box enter the port your server is running on. In the third text box enter the name of the database you will be using for this software. In the fourth text box enter you SQL authentication username. In the fifth text box enter your SQL authentication password. Click save info and home to be presented with the home screen. You will be able to return to this screen to edit the connection if you would like. Any invalid connection you try to establish later will not be saved. If you have already established a valid connection, you may enter the home screen at any time.
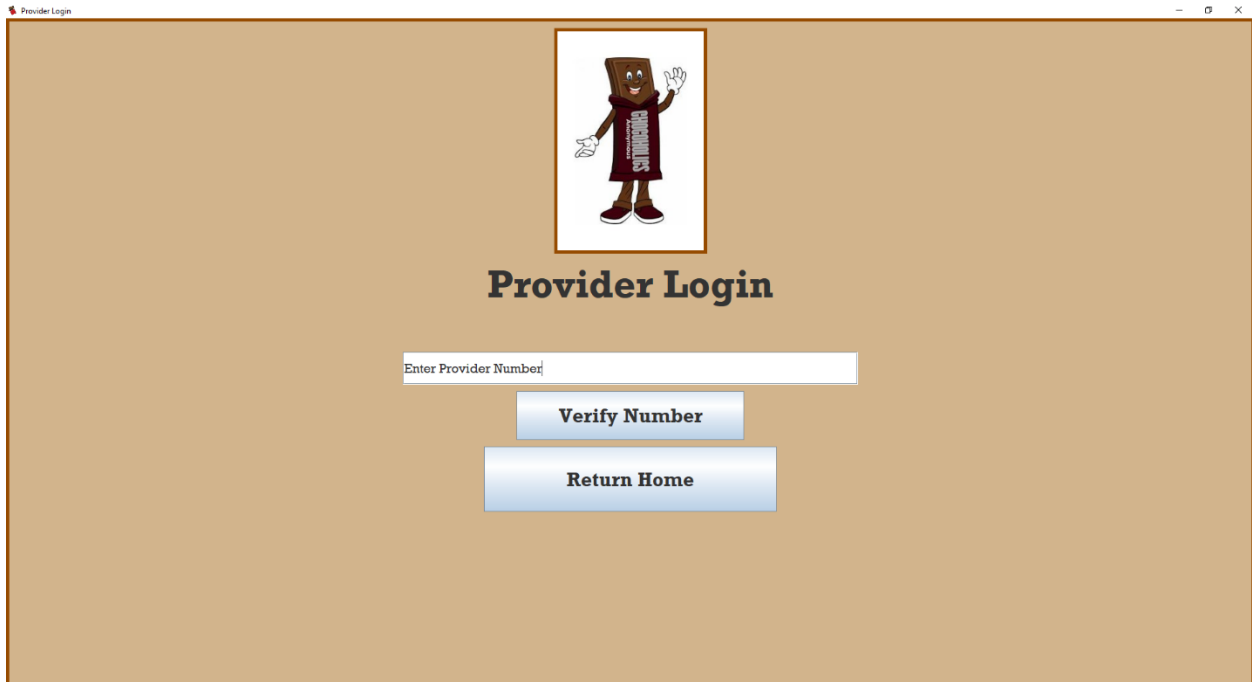
# Home Screen

Once you have saved your SQL information, and every execution hereafter, you will be presented with this screen.
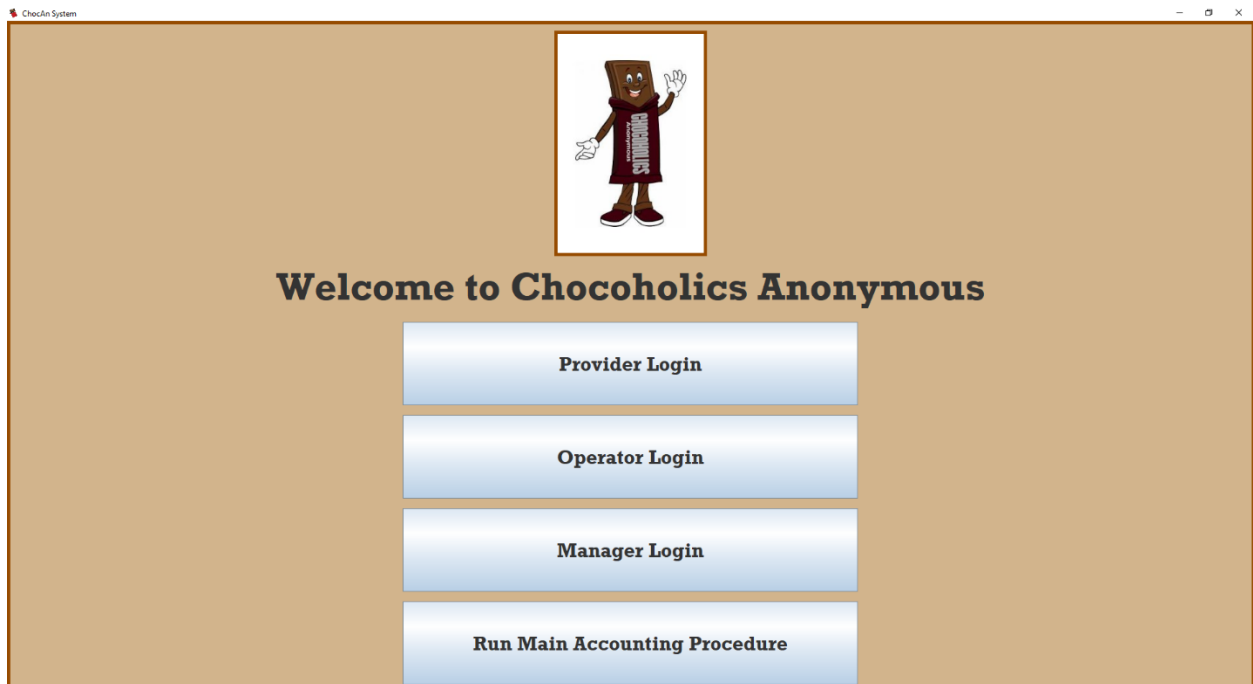


If you intend to use the software as a provider, click Provider Login. If you are using the software as an operator, click Operator Login. If you are using the software as a manager, click Manager Login. If you would like to run the main accounting procedure, click Run Main Accounting Procedure and confirm.

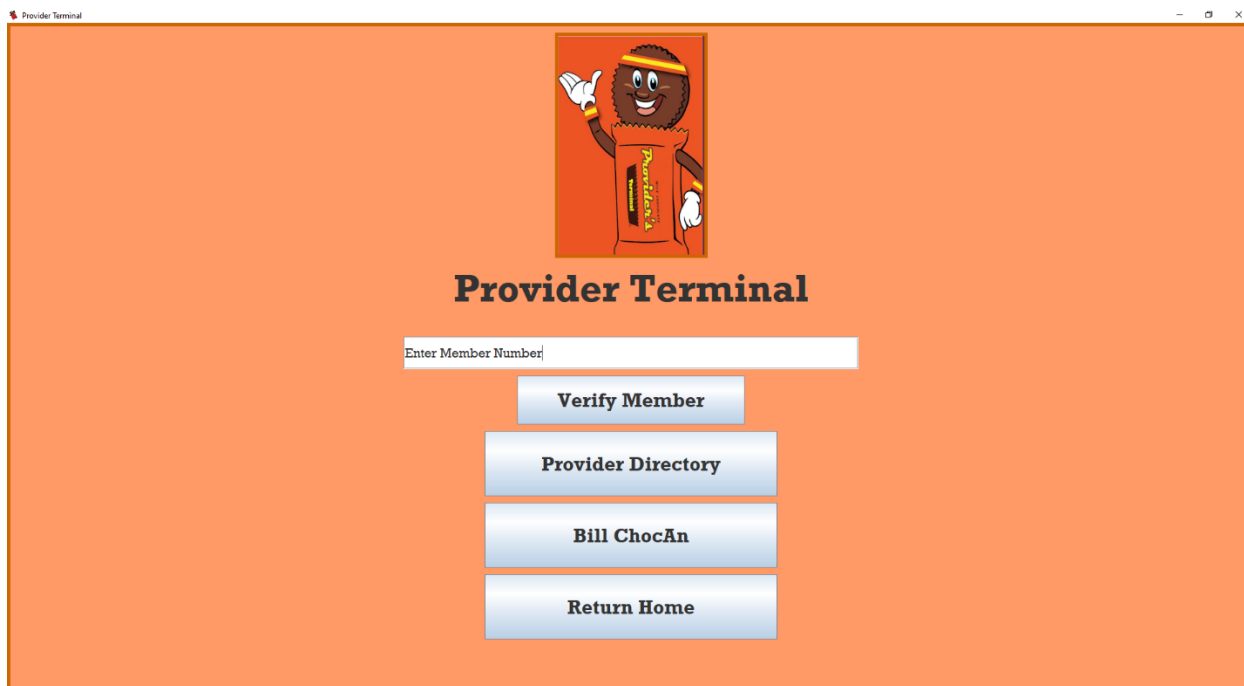# Provider Login

If you have selected Provider Login, you will be shown this screen.



To login, enter a valid nine-digit provider number and click Verify Number. If the number is valid, you will be presented with the Provider Terminal. If you would like to return to the home screen, click Return Home.

# Provider Terminal

After your valid provider login, you will be shown this screen.



If you would like to verify if a member number is valid or suspended, enter a nine-digit number into the text box and click Verify Member. If you would like to view the Provider Directory, click Provider Directory. If you would like to create a bill for ChocAn, click Bill ChocAn. If you would like to return to the home screen, click Return Home.
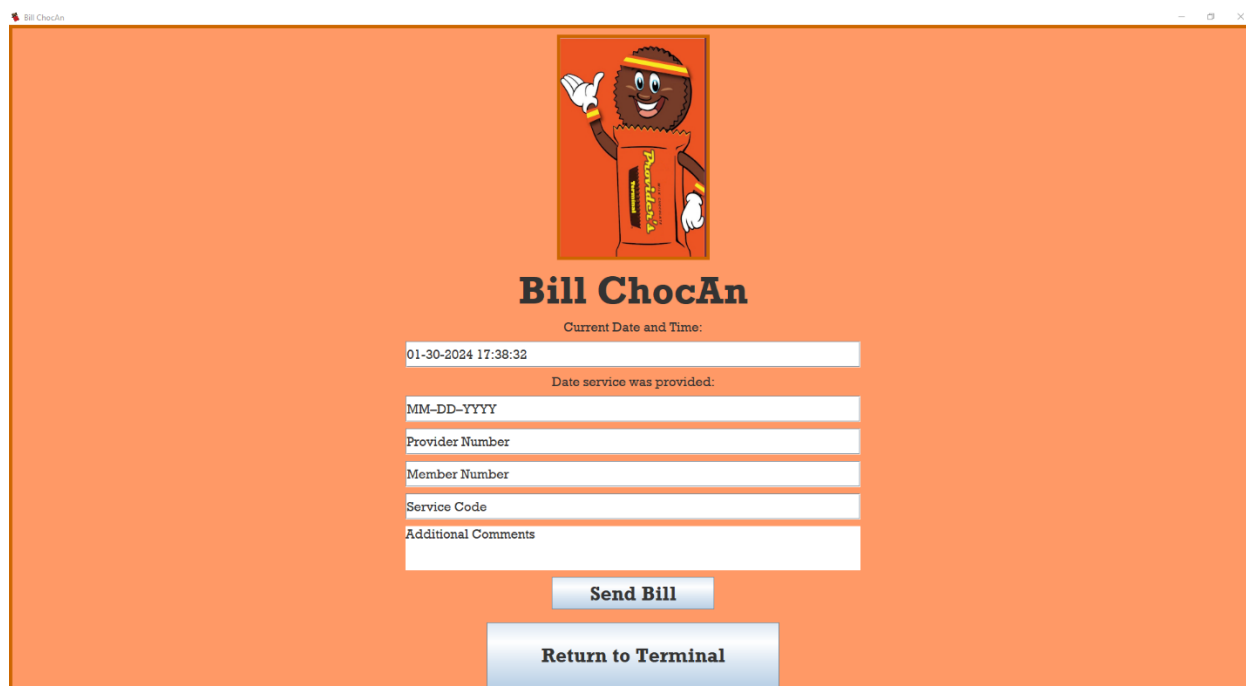
# Provider Directory

If you have selected Provider Directory, you will be presented with this screen.
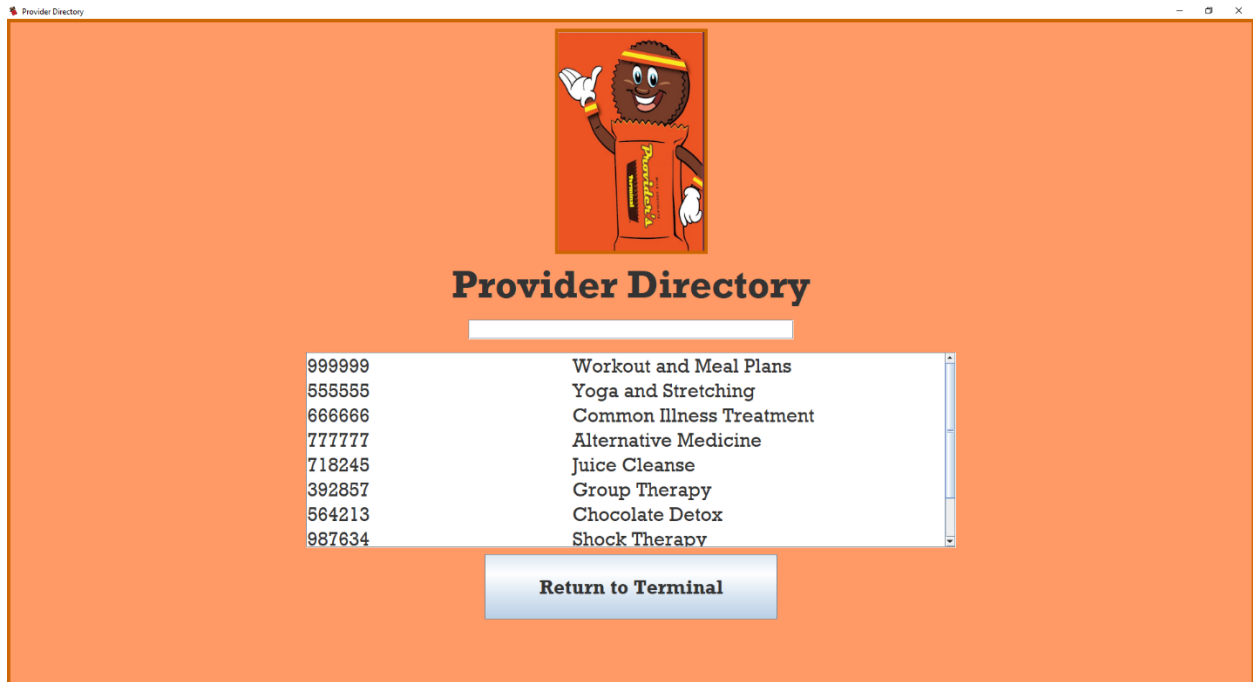


On the left side of the panel, you will see a list of valid service codes the provider can utilize. On the right side, you will see each code's description of the service. If sort through the list based on a service code number, enter the digits into the textbox and the panel will be filtered.

# Bill ChocAn

If you have selected Bill ChocAn, this screen will be displayed.
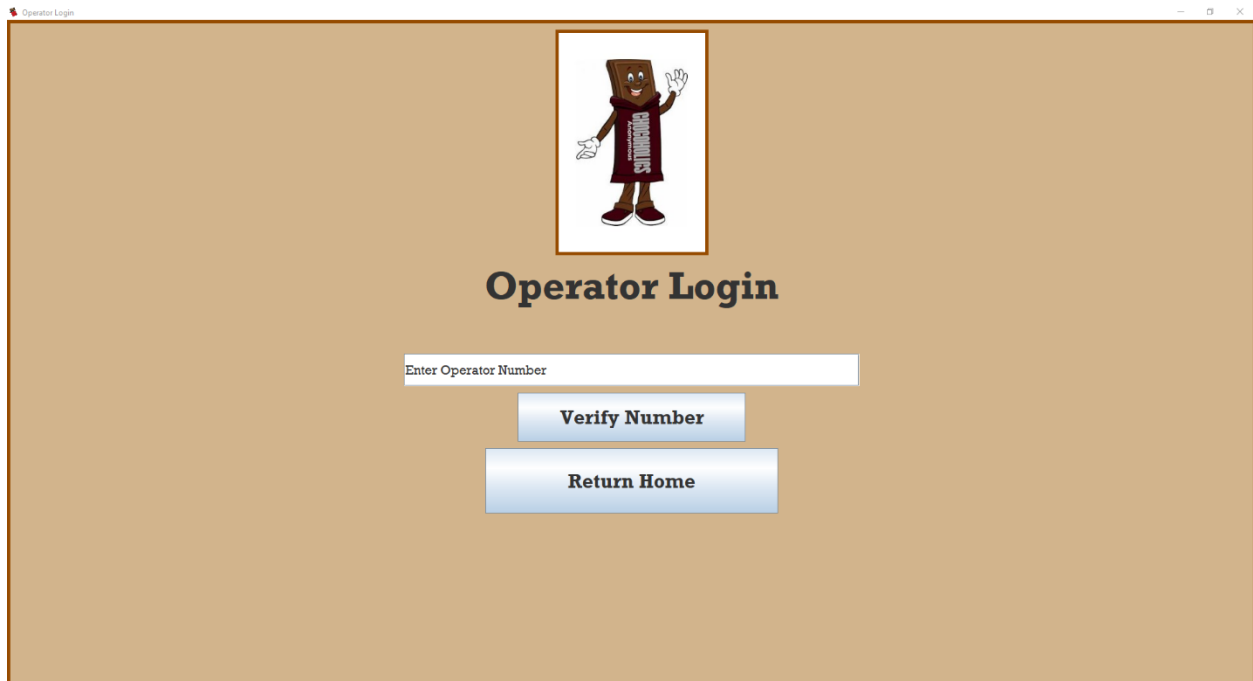


The first text box displays the current date and time, as this will be stored when you save the bill. In the second text box, enter the date the service was provided in the provided format. In the third text box, enter your provider number you used to login. In the fourth text box, enter the member number of the person who was provided the service. In the fifth text box, enter the service code of the service provided. In the sixth text box, enter any comments you would like to leave about the service. Click Send Bill and confirm to send the bill to ChocAn. If you would like to return to the Provider Terminal, select Return to Terminal.

# Operator Login

If you have selected operator login, you will be shown this screen.
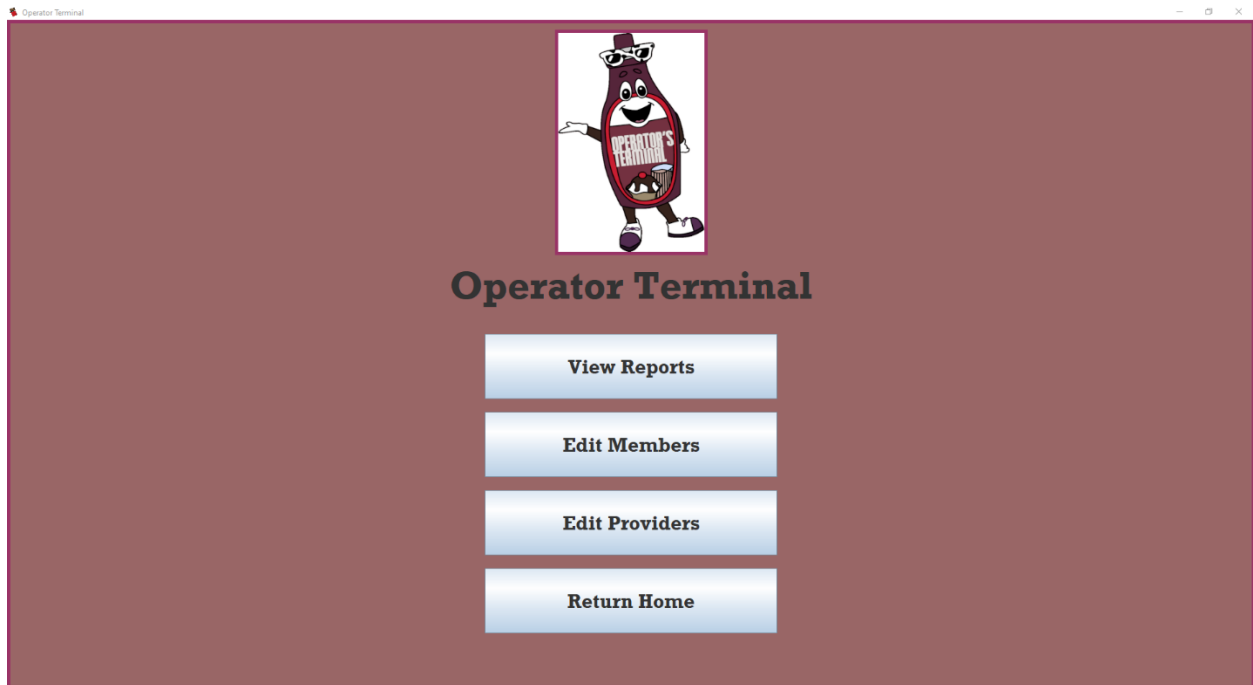


To login, enter a valid nine-digit operator number in the textbox and click Verify Number. If the number is valid, you will see the Operator Terminal. If you would like to return to the home screen, select Return Home.

# Operator Terminal

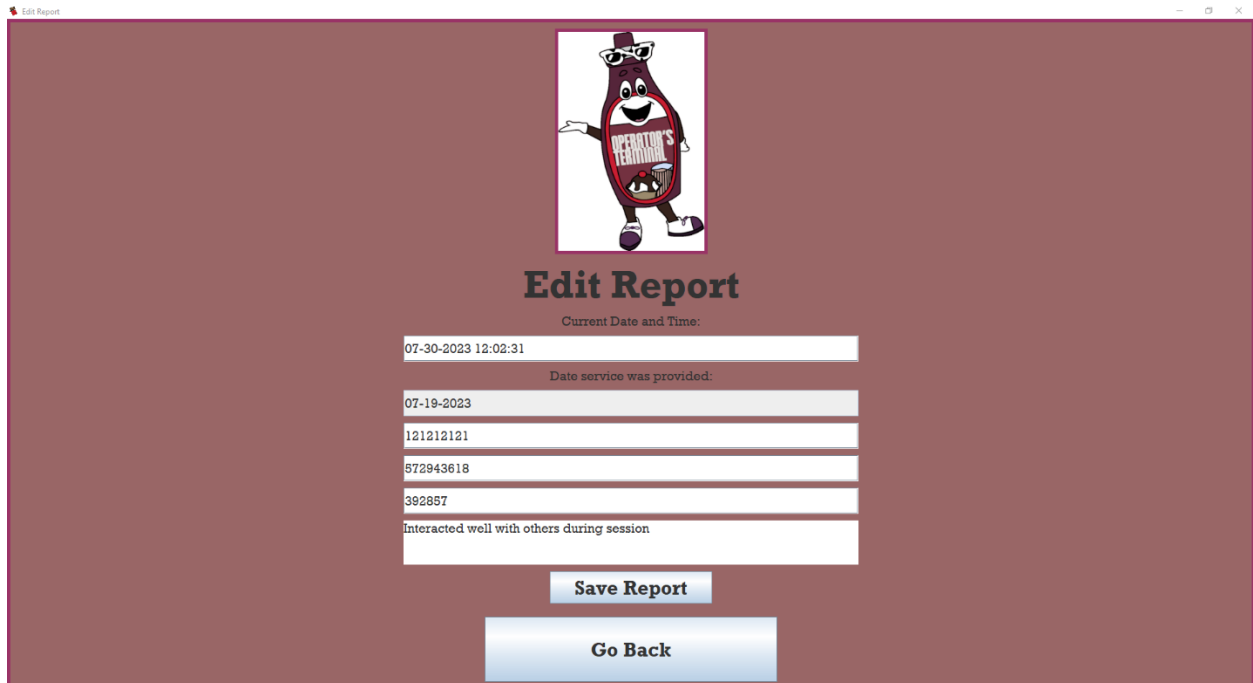Once you have logged in as an operator, this screen will be displayed.



If you would like to view the contents of a bill sent by a provider, select View Reports. If you would like to make changes to the members, select Edit Members. If you would like to make changes to the providers, select Edit Providers. To return to the home screen, select Return Home.

# View Reports

If you have selected View Reports, you will be shown this screen.
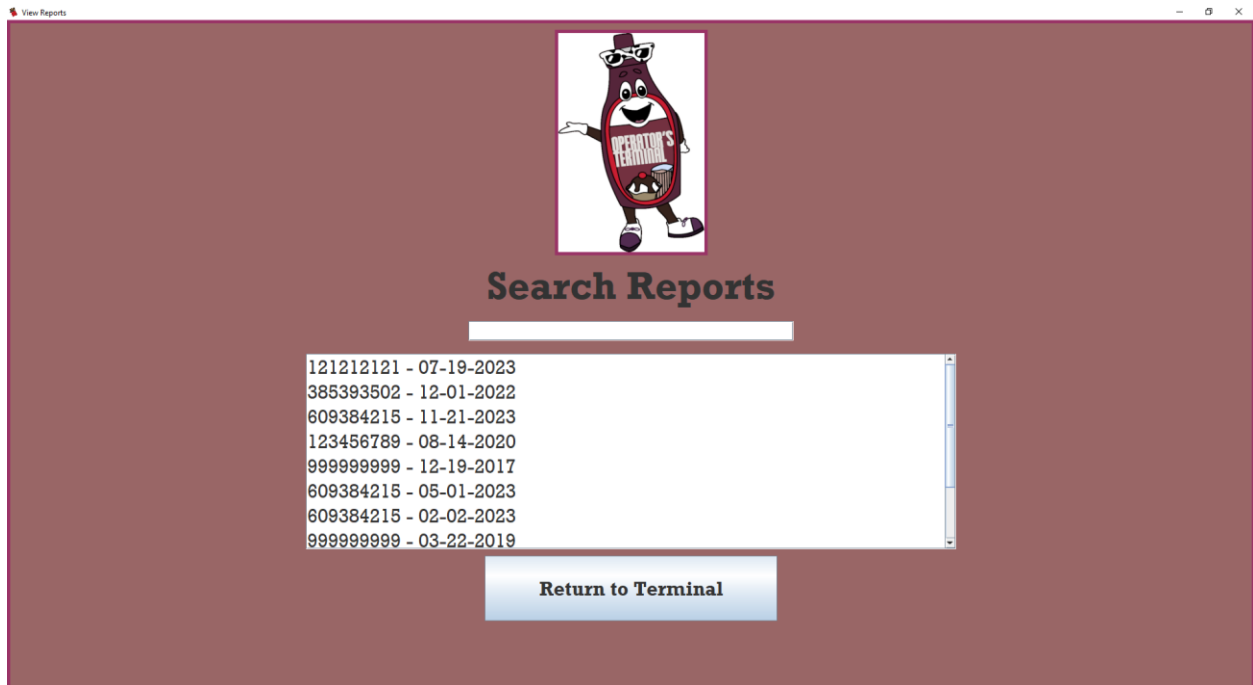


The initial string is the provider number of the provider of the service. The second string is the date the service was provided. If you would like to filter through the list, enter a provider number or date into the text box. To view a report, click it and confirm. To return to the Operator Terminal, select Return to Terminal. Once you have selected a report, it will display the following screen (with the correct information based on the report you choose).

The first textbox shows the date the report was billed. The second textbox shows the date the service was provided. Note that this cannot be changed. The third textbox shows the provider number of the provider of service. The fourth textbox shows the member number of the receiver of service. The fifth textbox shows the service code of the service provided. The sixth textbox shows the comments left on the service. If you would like to save the report, click Save Report and confirm. To return to the reports list without saving the changed information, click Go Back.
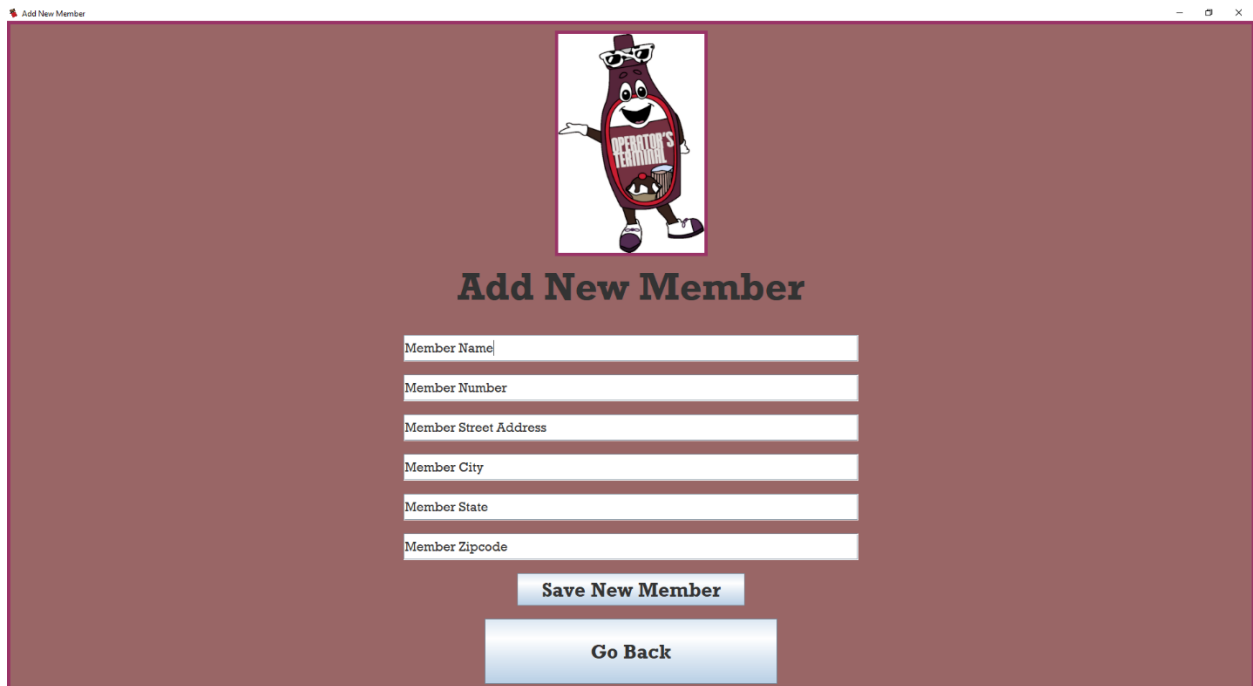
# Edit Members

If you have selected Edit Members, you will be presented this screen.
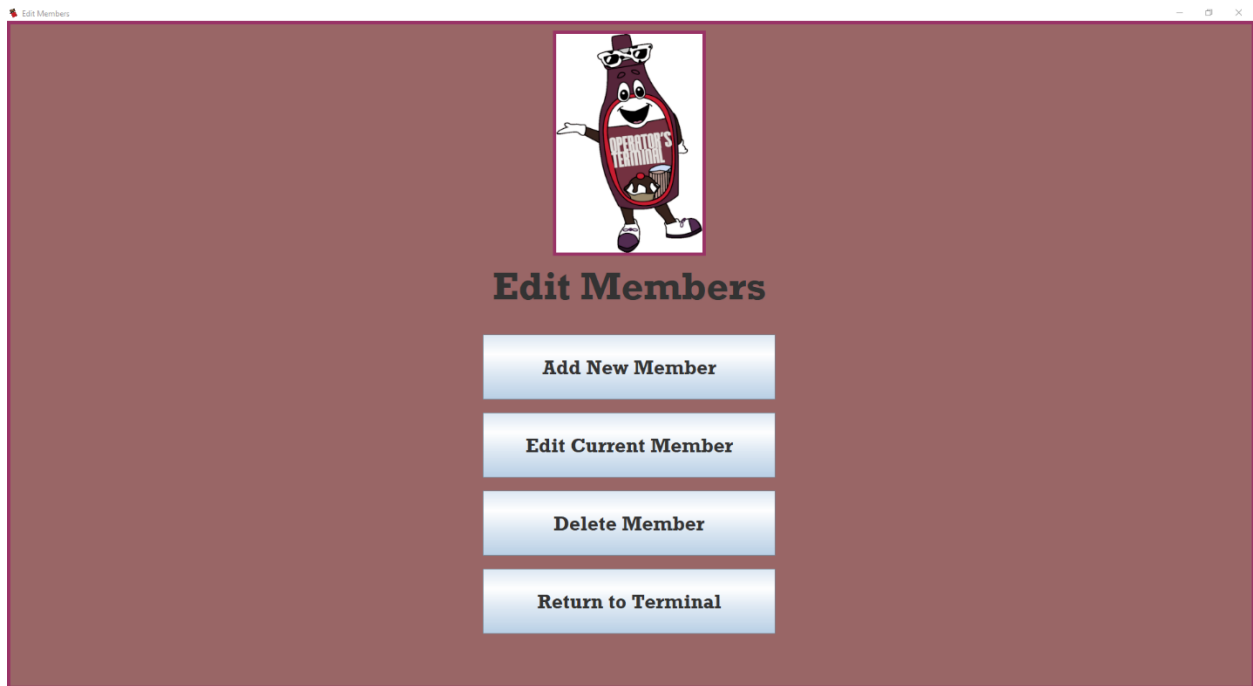


If you would like to add a new member, click Add New Member. If you would like to update a current member's information, select Edit Current Member. If you would like to delete a member from the database, choose Delete Member. To return to the Operator Terminal, select Return to Terminal.

# Add New Member

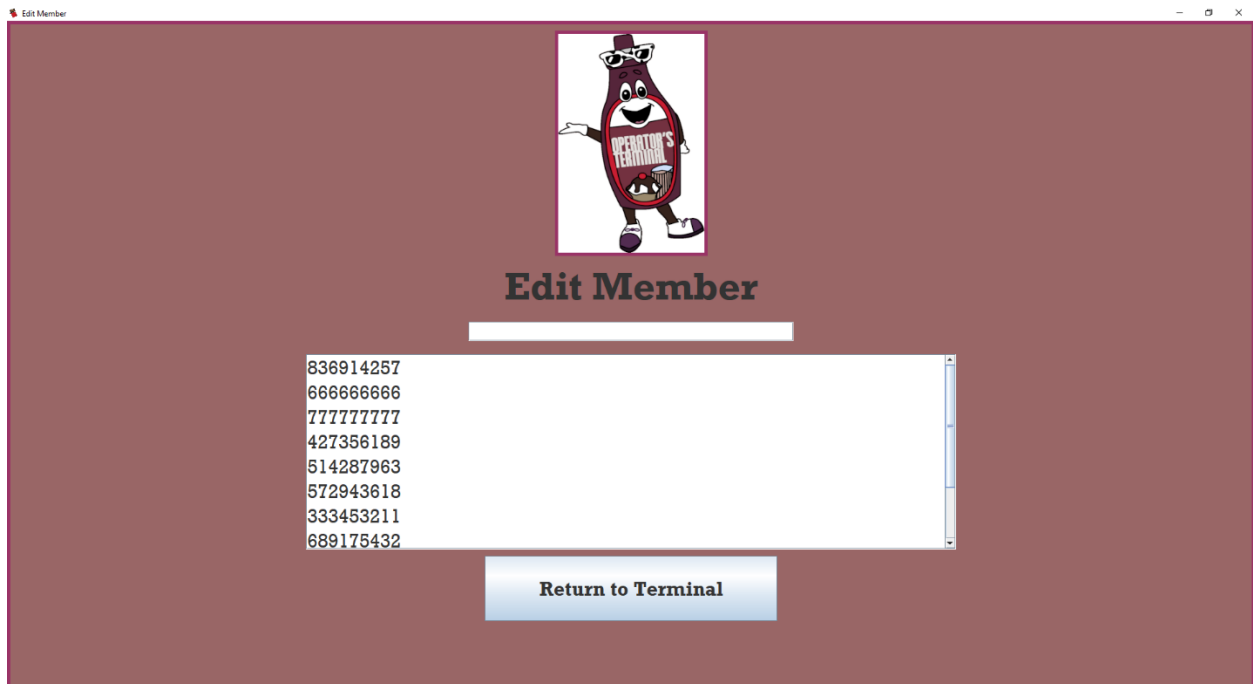If you have selected Add New Member, this screen will be shown.



In the first textbox, enter the new member's name. In the second textbox, enter an unused nine-digit number. In the third textbox, enter the new member's address. In the fourth textbox, enter the new member's city. In the fifth textbox, enter the new member's state in its two-letter abbreviated format. In the sixth textbox, enter the new member's zip code. To save the new data, select Save New Member and confirm. To return to the Edit Members screen without saving, click Go Back.

# Edit Current Member

If you have selected Edit Current Member, the following screen will be presented.
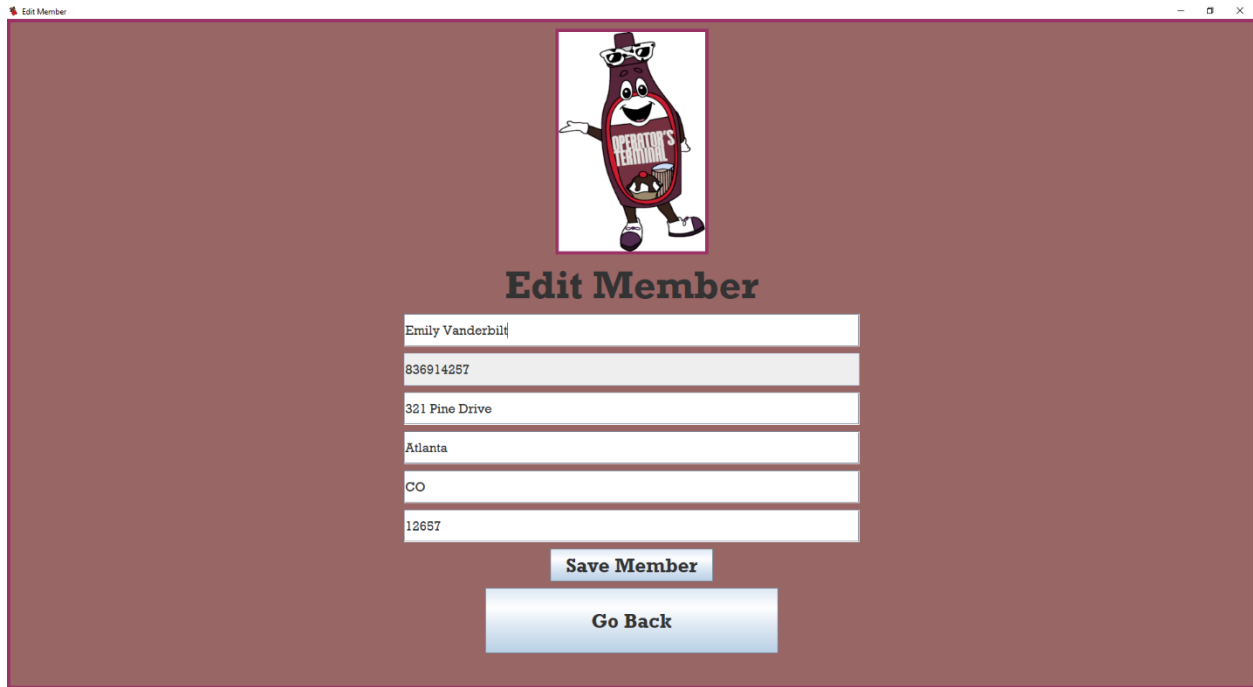


To edit a specific member, select their member code in the list. To filter through the list, enter a member code in the textbox. If you would like to return to the Operator Terminal, click Return to Terminal. Once you have selected a member, you will be shown the following screen (with the information of the selected member).

**Edit Member**

| Emily Vanderbilt |
| 836914257 |
| 321 Pine Drive |
| Atlanta |
| CO |
| 12657 |

**Save Member**

**Go Back**

In the first textbox, you will see the member's name. In the second textbox you will see the member's code. This code cannot be changed. In the third textbox, you will see the member's address. In the fourth textbox, you will see the member's city. In the fifth textbox, you will see the member's state. In the sixth textbox, you will see the member's zip code. To save the updated information, select Save Member and confirm. To return to the list of members, click Go Back.

# Delete Member

If you select delete member, you will see this screen.
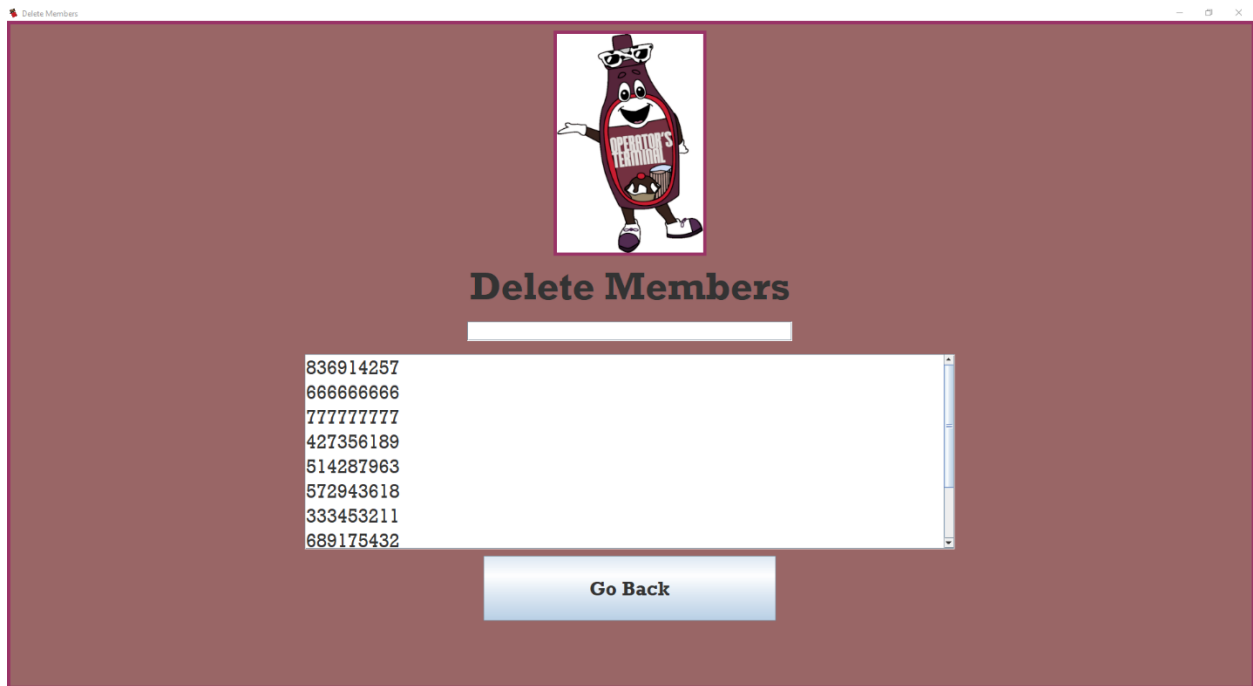


Click on the member you would like to delete and confirm for them to be removed from the database. If you would like to filter the numbers in the list by member code, enter a member code into the textbox. To return to the Edit Members screen, select Go Back.
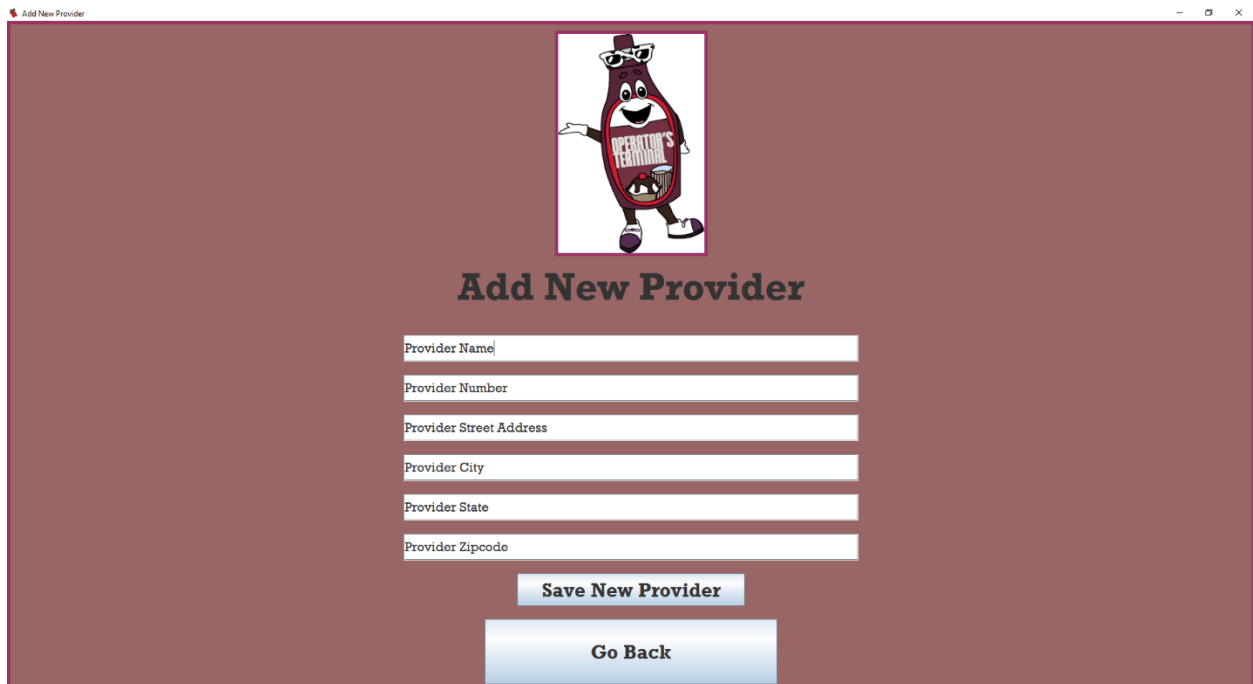
# Edit Providers

If you have selected Edit Providers, you will be shown this screen.
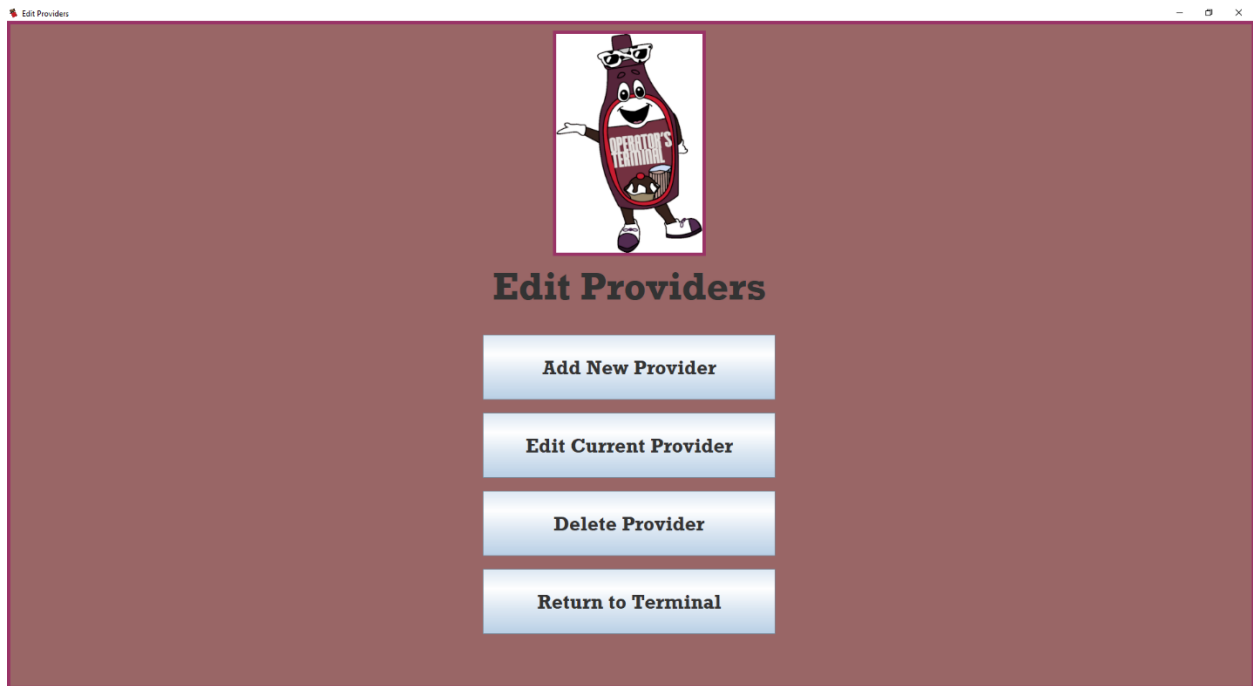


To add a new provider to the database, select Add New Provider. To edit a provider that already exists, select Edit Current Provider. To delete a provider from the database, select Delete Provider. If you would like to return to the Operator Terminal, click Return to Terminal.

# Add New Provider

If you have selected Add New Provider, this screen will be displayed.
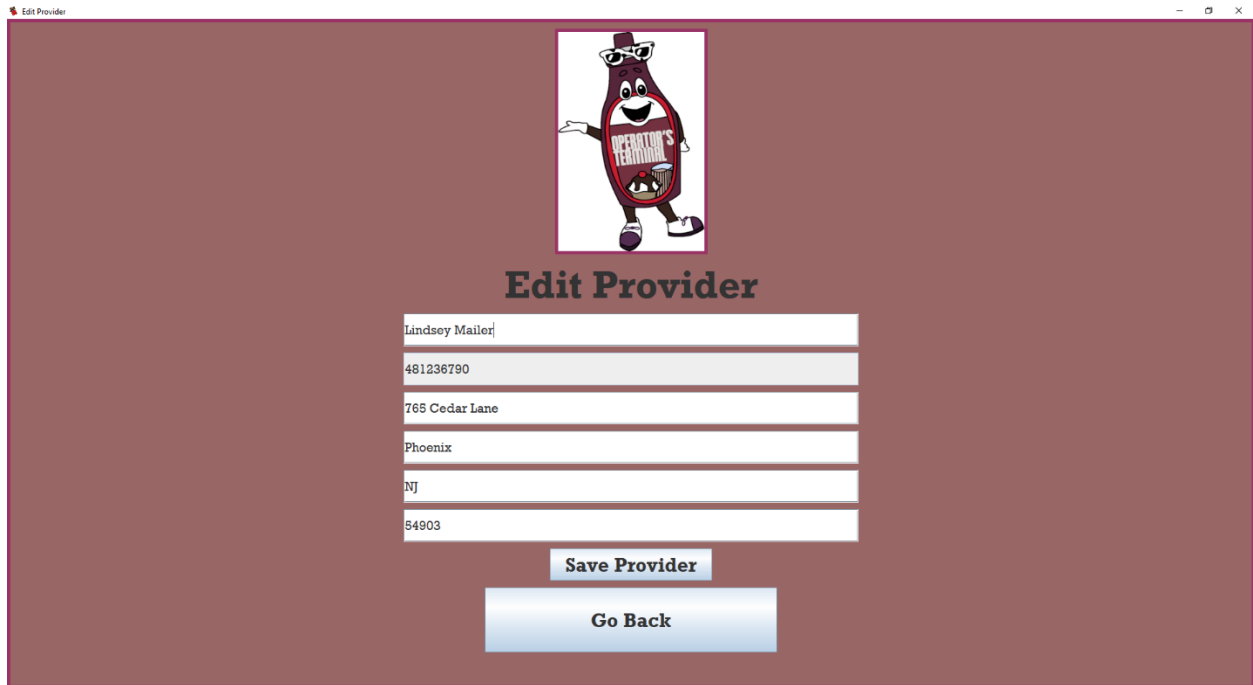


In the first textbox, enter the new provider's name. In the second textbox, enter an unused nine-digit number. In the third textbox, enter the new provider's address. In the fourth textbox, enter the new provider's city. In the fifth textbox, enter the new provider's state in its two-letter abbreviated format. In the sixth textbox, enter the new provider's zip code. To save this provider, select Save New Provider and confirm. To return to the Edit Providers screen without saving, select Go Back.

# Edit Current Provider

If you have selected Edit Current Provider, this screen will be displayed.
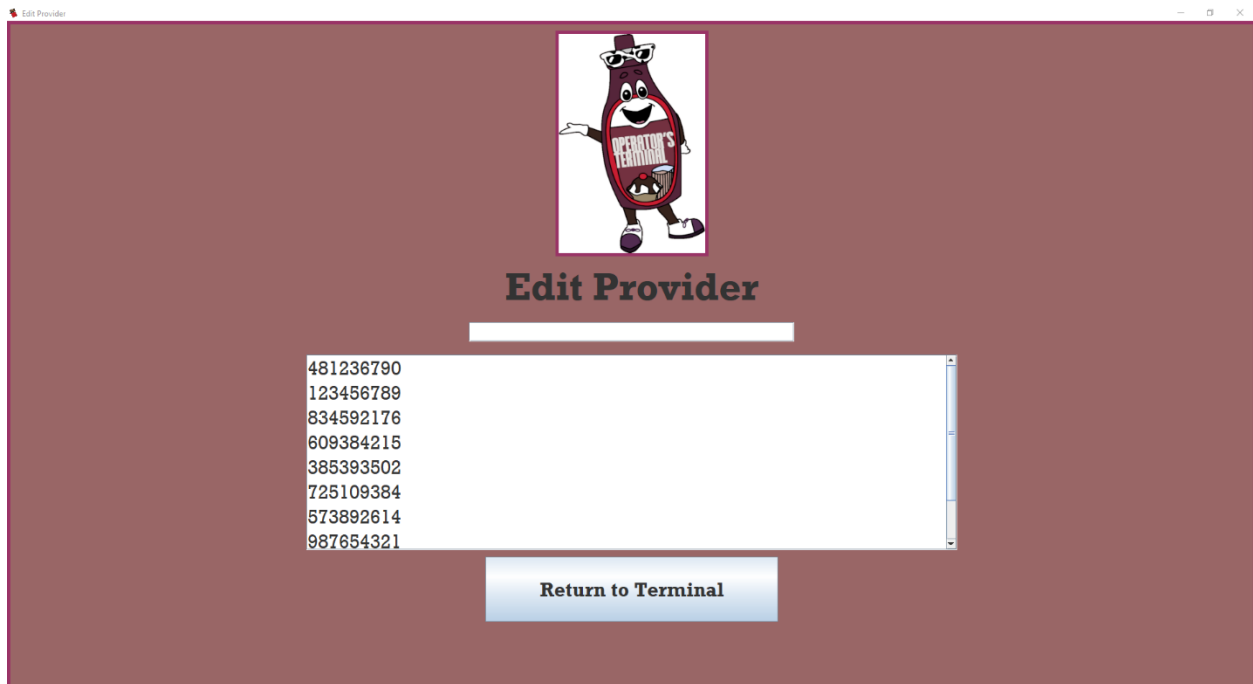


To edit a specific provider, select their provider code in the list. To filter through the list, enter a provider code in the textbox. If you would like to return to the Operator Terminal, click Return to Terminal. Once you have selected a provider, you will be shown the following screen (with the information of the selected provider).

In the first textbox, you will see the provider's name. In the second textbox, you will see the provider's code. This cannot be changed. In the third textbox, you will see the provider's address. In the fourth textbox, you will see the provider's city. In the fourth textbox, you will see the provider's state. In the fifth textbox, you will see the provider's zip code. To save your changes, select Save Provider and confirm. To return to the list of providers, select Go Back.
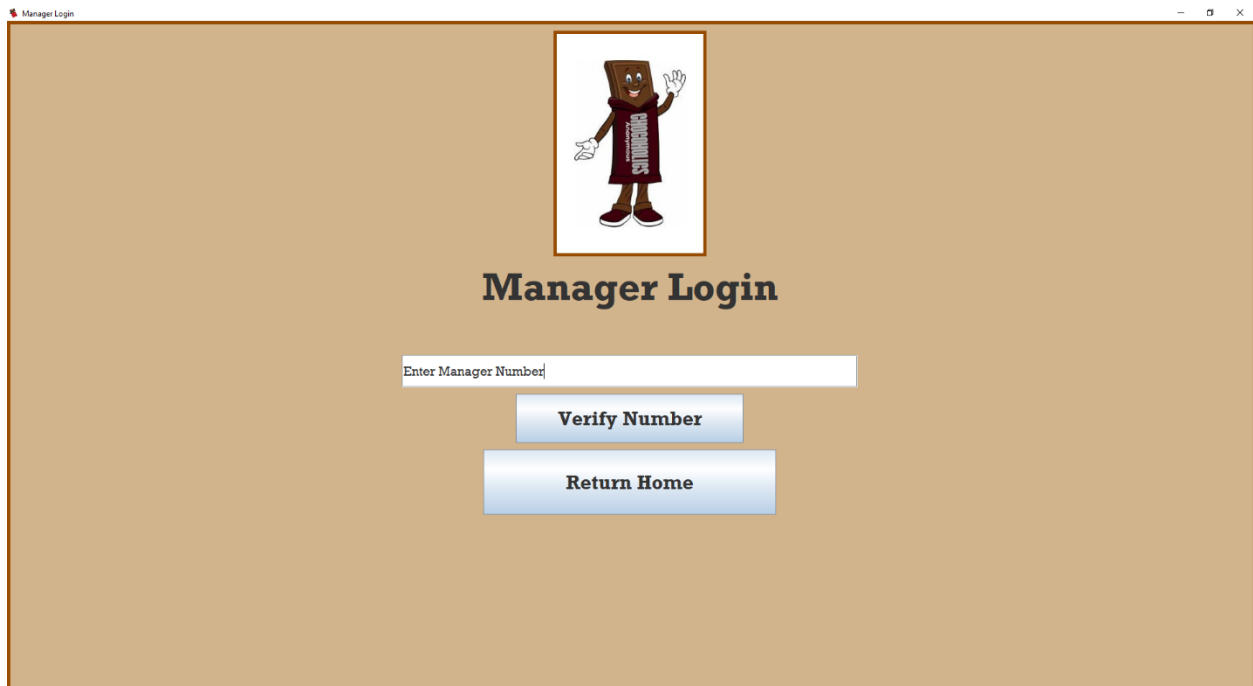
# Delete Provider

If you select Delete Provider, you will see this screen.
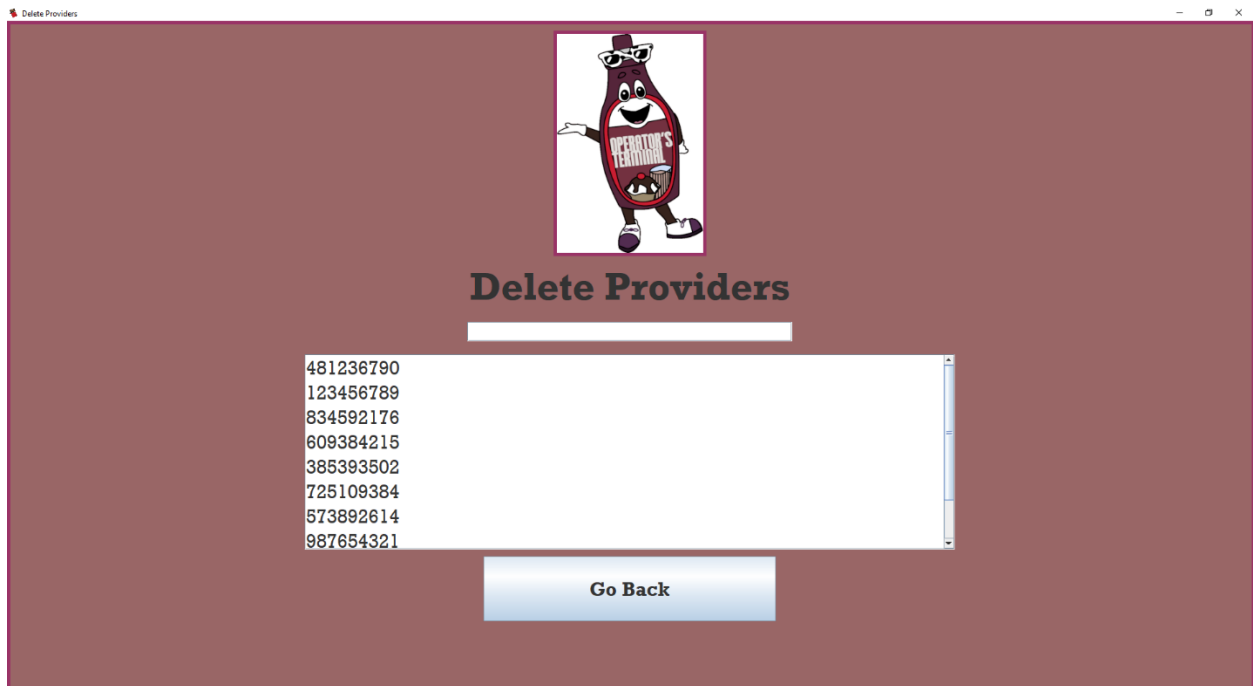


Click on the provider you would like to delete and confirm for them to be removed from the database. If you would like to filter the numbers in the list by provider code, enter a provider code into the textbox. To return to the Edit Providers screen, select Go Back.

# Manager Login

If you select Manager Login, this screen will be shown.
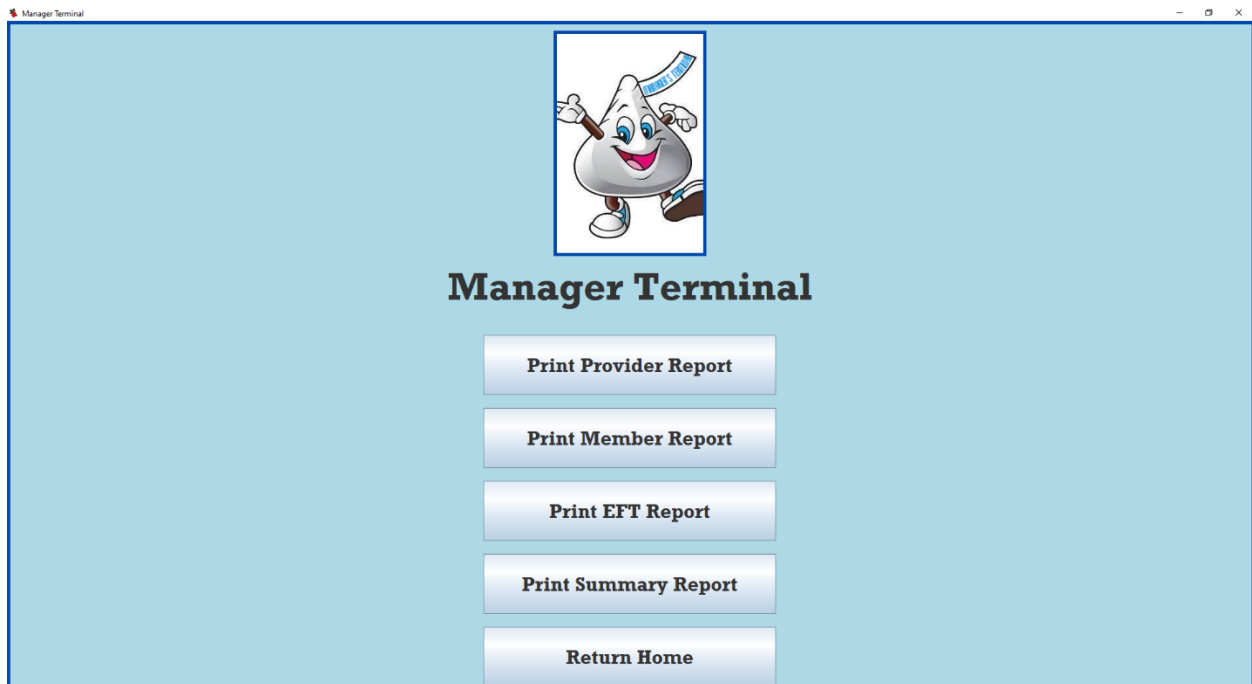


To login, enter a valid nine-digit manager number and click Verify Number. If the number is valid, you will be presented with the Manager Terminal. If you would like to return to the home screen, click Return Home.
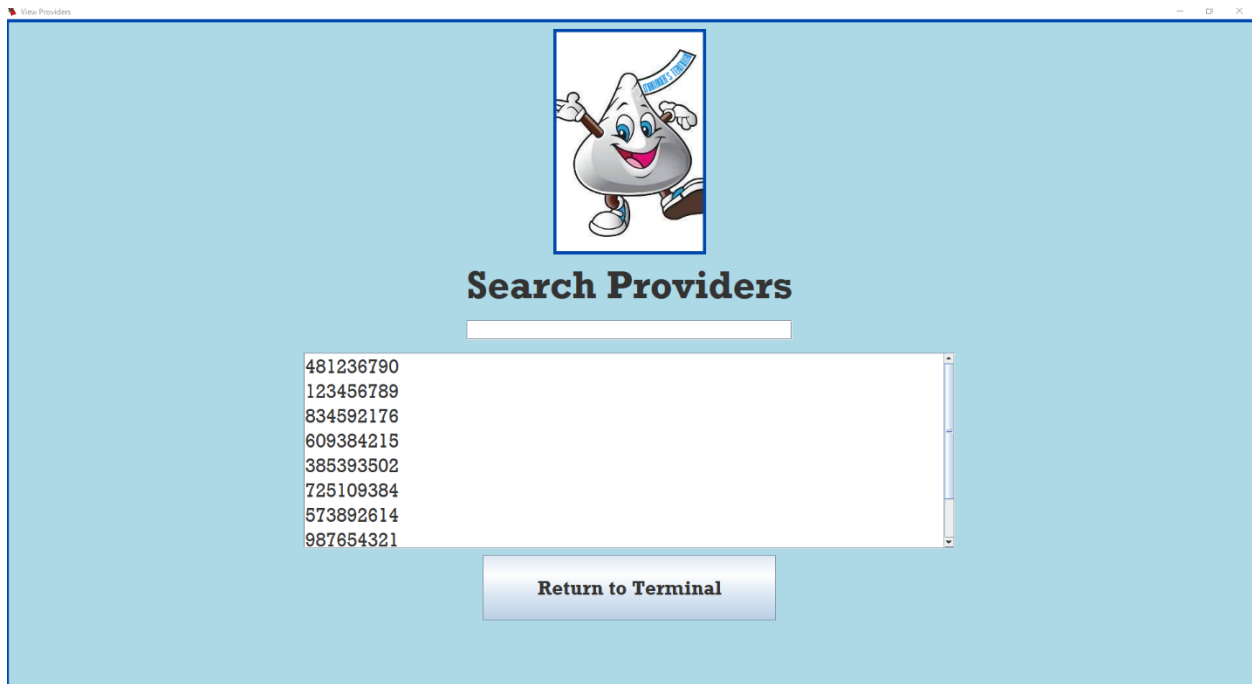
# Manager Terminal

Once you have logged in as a manger, you will see this screen.



If you would like to print a provider report, select Print Provider Report. If you would like to print a member report, select Print Member Report. If you would like to print an EFT report, select Print EFT Report. If you would like to print the summary report, select Print Summary Report. To return to the home screen, click Return Home.

# Print Provider Report

If you have selected Print Provider Report, you will see this screen.



To view a report, select the provider number you wish to see. Enter a provider number in the textbox to filter the list. If you would like to return to the Manager Terminal, click Return to Terminal. Once you have selected a report, you will see this screen (with the correct information).

To return to the list of available reports, select Available Reports.

# Print Member Report

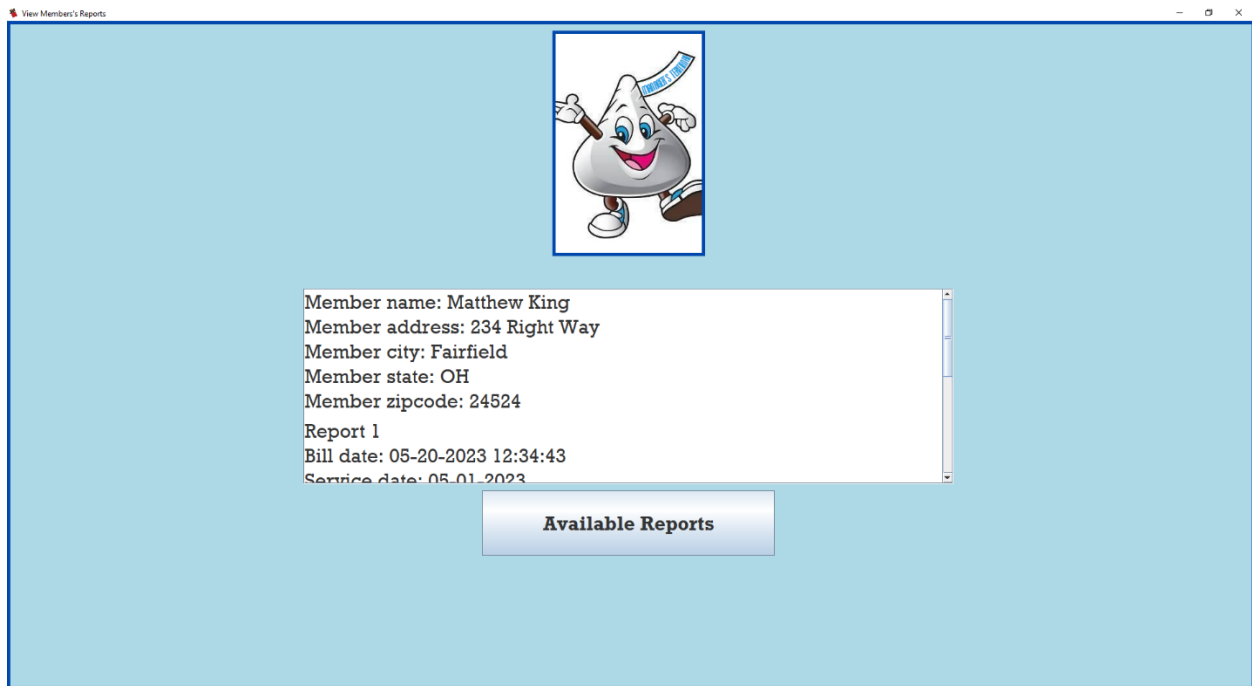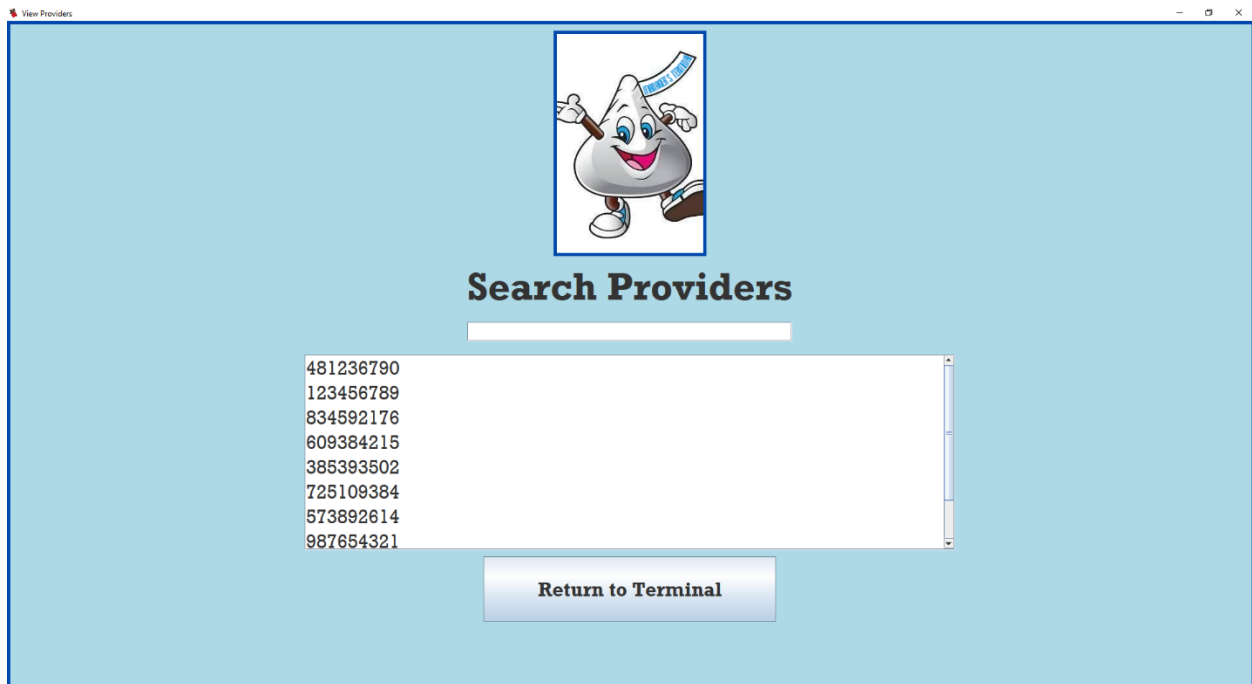If you select Print Member Report, you will see this screen.

To view a report, select the member number you wish to see. Enter a member number in the textbox to filter the list. If you would like to return to the Manager Terminal, click Return to Terminal. Once you have selected a report, you will see this screen (with the correct information).



To return to the list of available reports, select Available Reports.

# Print EFT Report

If you selected Print EFT Report, this screen will be displayed.



To view a provider's EFT report, select the provider number you wish to see. Enter a provider number in the textbox to filter the list. If you would like to return to the Manager Terminal, click Return to Terminal. Once you have selected a report, you will see the following screen (with the correct information).
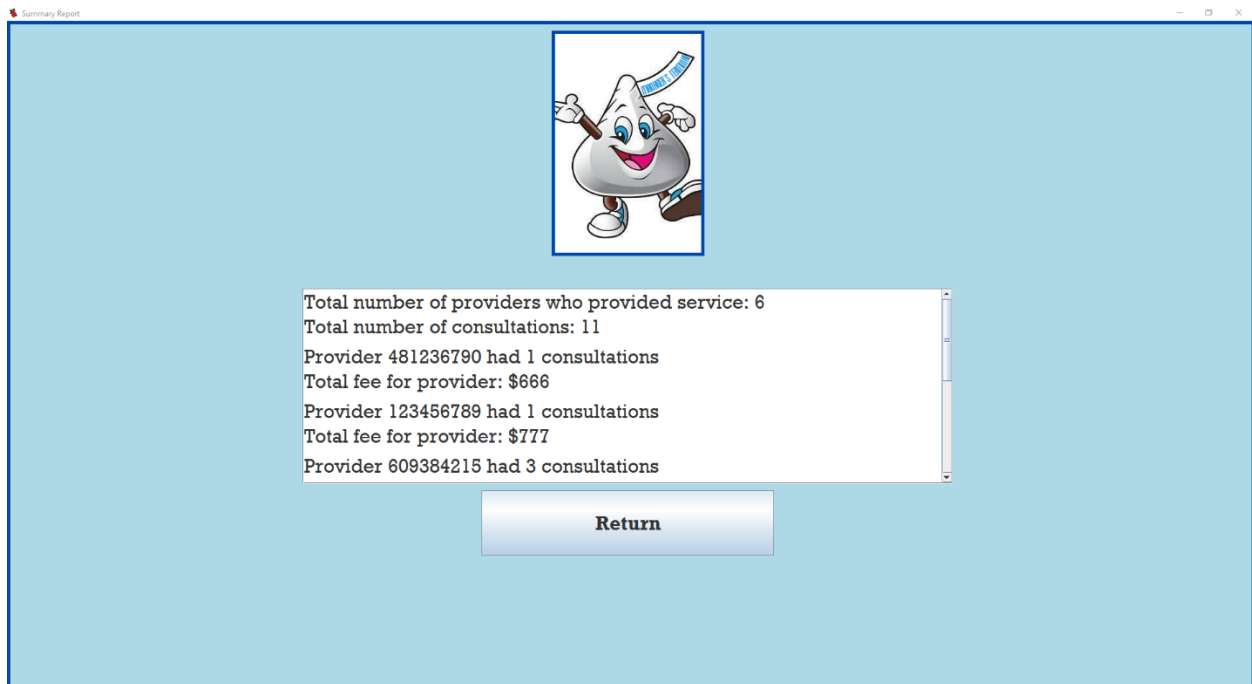
Provider name: Dex Martin
Provider Number: 999999999
Amount to transfer: $1471

Return

To return to the list of reports, select Return.
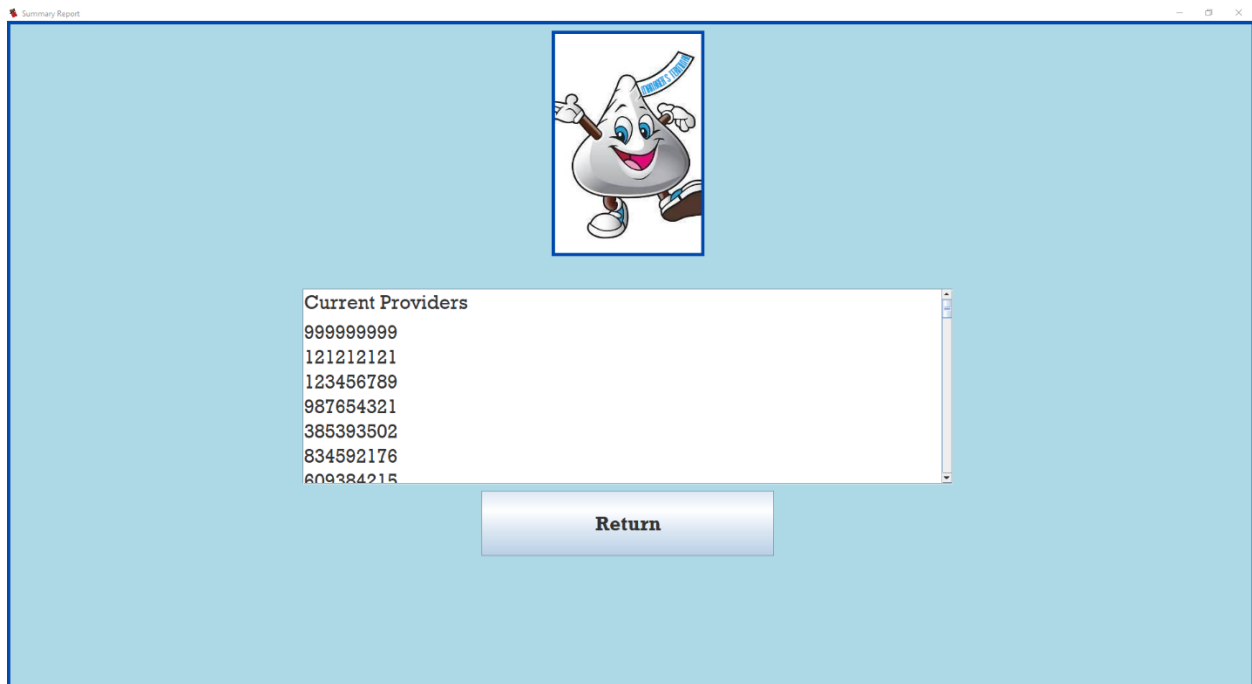
# Print Summary Report

If you select Print Summary Report, you will see this screen.



To return to the Manager Terminal, click return.

# Run Main Accounting Procedure

If you select Run Main Accounting Procedure, you will be shown this screen.



This screen displays all provider codes, valid member codes, suspended member codes, and information regarding how many services provided and amount owed for all providers. To return to the Manager Terminal, click Return.