

User Manual

Project Catawba Area Agency On Aging Database (CAAAD)

by

Justin Carmona, Jordan Douglas, AJ Ellis,
Preston Fisher, Walker Immel, Christian
Morris, Donnie Sullivan, Mario Delgado

TABLE OF CONTENTS

[1. Login](#)

[2. Main Menu](#)

[3. Enter a New Client](#)

[4. Search a Client](#)

[5. Edit a Client](#)

[6. Exporting Files](#)

[7. Importing Files](#)

[8. Enter a New User *Admin Only*](#)

[9. Edit a User.*Admin Only*](#)

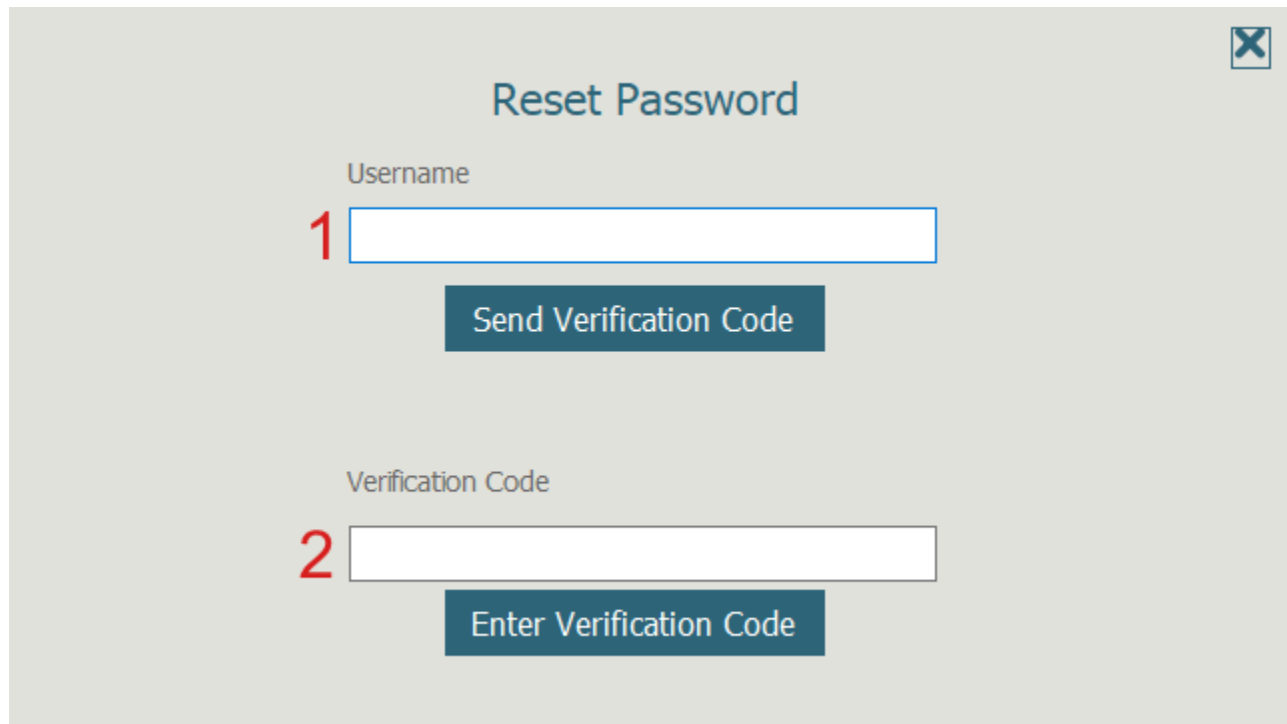
1. Login

The image shows a login form titled "Login to Your Account" with a user icon at the top. The form includes a "Username" field, a "Password" field, a "Forgot" button, and a "Login" button. A close button (X icon) is in the top right corner. Red lines with numbers 1 through 5 point to specific elements: 1 points to the Username field, 2 points to the Password field, 3 points to the Login button, 4 points to the close button, and 5 points to the Forgot button.

On startup the program is on the Login to Your Account page where it asks the user for their login information. **Note:** Users' passwords must be at least 8 characters long, contain at least 2 capital letters, at least 1 special character, and at least 2 numbers.

1. Enter the username credentials into this box.
2. Enter the password to the user's account in this box.
3. Once the user's username and password are entered, click this box to proceed to the main menu.
4. Click this to exit the program.
5. Click this 'FORGOT' button if the user forgot their login credentials.

1a. Forgot Login

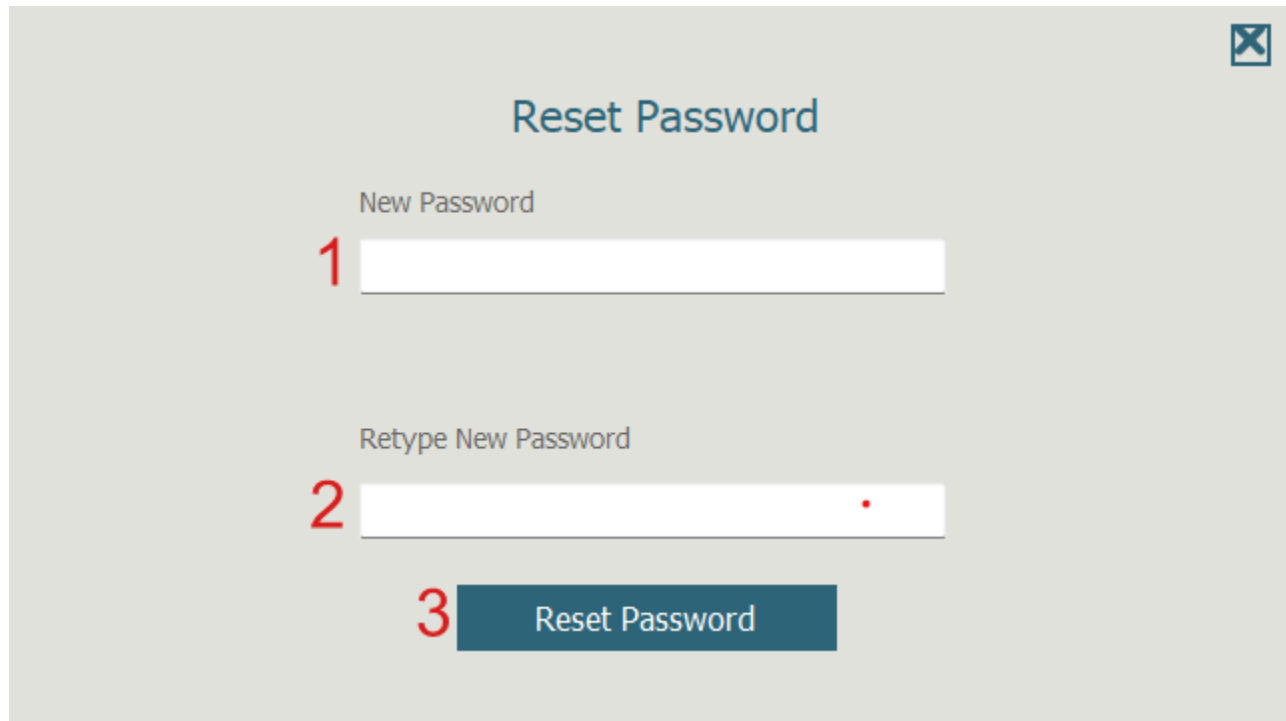


The image shows a 'Reset Password' form on a light gray background. In the top right corner, there is a small blue square icon with a white 'X'. The title 'Reset Password' is centered at the top in a dark blue font. Below the title, the label 'Username' is in a light gray font. A red number '1' is positioned to the left of a white text input box. Below this input box is a dark blue button with the text 'Send Verification Code' in white. Further down, the label 'Verification Code' is in a light gray font. A red number '2' is positioned to the left of another white text input box. Below this second input box is a dark blue button with the text 'Enter Verification Code' in white.

This is the Forgot Login page. If the user forgot their password the user will need to follow these steps in order to recover their account.

1. Type their Username then press the 'Send Verification Code' button so that a six character Verification Code is sent to the user's email address that was used to register into the user's account.
2. In the user's email there will be a six character Verification Code which may take time to be sent. Once the user has the Verification Code they should put the code in the Verification Code text box then press the 'Enter Verification Code' button.
 - a. Once that is done the user is taken to the reset password page.

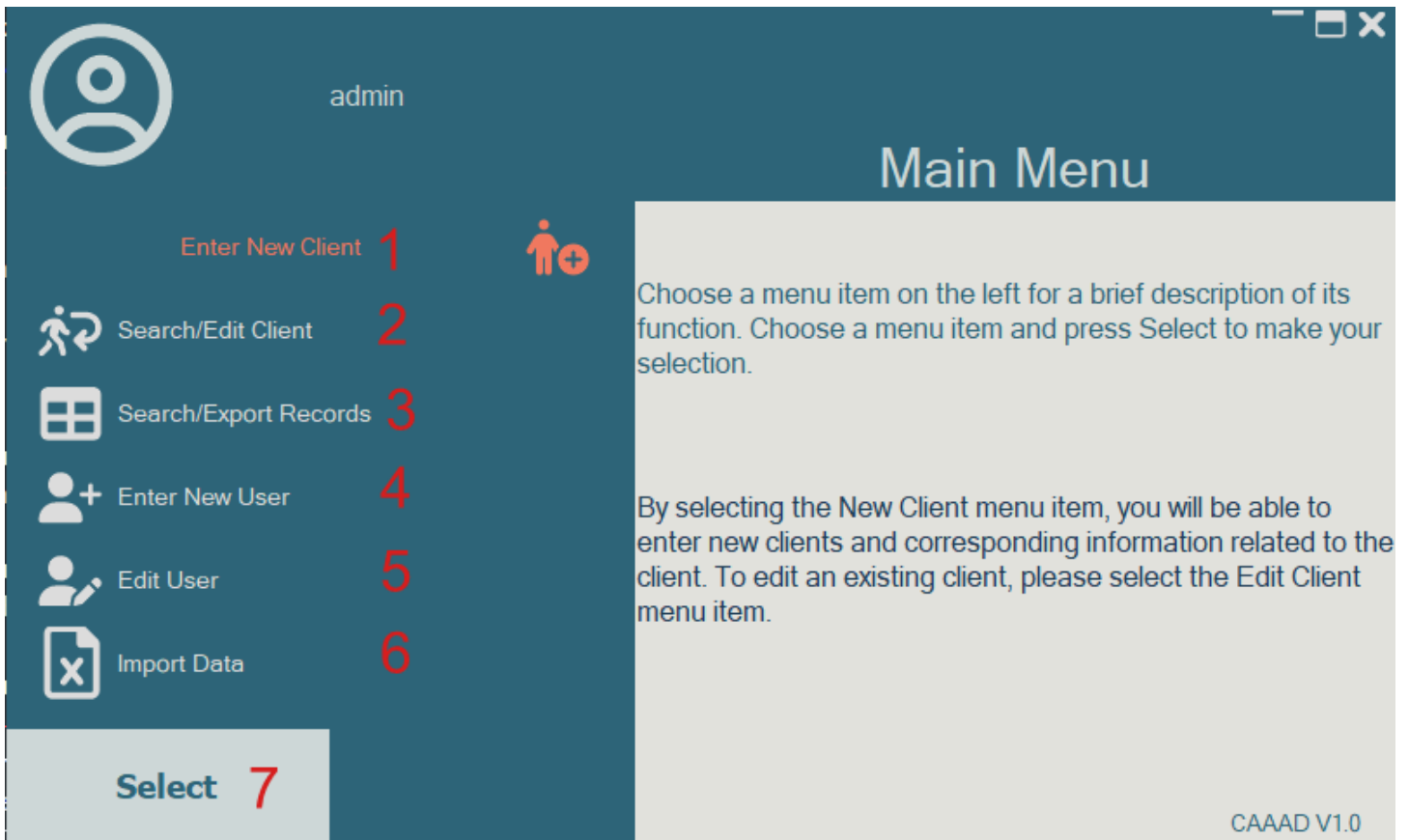
2a. Reset Password

A screenshot of a 'Reset Password' web form. The form has a light gray background and a dark blue title 'Reset Password' at the top center. In the top right corner, there is a small blue square icon with a white 'X'. The form contains two text input fields. The first field is labeled 'New Password' in a light gray font. To its left is a large red number '1'. The second field is labeled 'Retype New Password' in a light gray font. To its left is a large red number '2'. A small red dot is visible at the end of the second input field. Below the second field is a dark blue button with the text 'Reset Password' in white. To the left of this button is a large red number '3'.

This is the Reset Password page. The user types a new password; which must be at least 8 characters long, contain at least 2 capital letters, at least 1 special character, and at least 2 numbers.

1. Type their New Password.
2. Retype their New Password to confirm.
3. Click this 'Reset Password' to reset the user's password.

2. Main Menu



This is the main menu interface, the user can get to all other interfaces from here. Exiting out of other interfaces will bring the user back to this screen.

1. This will take the user to the enter new client interface.
2. This will take the user to the Search/Edit Client interface.
3. This will take the user to the Search/Export Records interface.
4. This will take the user to the Enter New User interface. * ADMIN ONLY *
5. This will take the user to the Edit User client interface. * ADMIN ONLY *
6. This will take the user to the Import Data client interface.
7. Press the SELECT button after clicking one of the above options to be taken to that interface.

3. Enter a New Client

The screenshot shows a web application window titled "Enter New Client". The interface is divided into three main sections: "Client Information", "Programs", and "Comments".

- Section 1 (Client Information):** This section contains various input fields for client details. The fields are arranged in a grid:
 - Row 1: Date Admitted (MM/DD/YYYY), Apartment Number, Date of Birth (MM/DD/YYYY)
 - Row 2: Last Name, City, Income
 - Row 3: First Name, State (dropdown), Marital Status (dropdown)
 - Row 4: Street Address, Zip Code, Household Size
 - Row 5: P.O. Box, Phone Number
- Section 2 (Programs):** This section contains a list of checkboxes for selecting applicable programs:
 - Information, Referral, and Assistance
 - Caregiver
 - Home Delivered Meals
 - Medicare Counseling (SHIP)
 - Evidenced Based Health
 - Congregate Meals
 - Medicaid
 - Legal Service
 - Home Care
 - Medicare
 - Consumer Choice
 - Transportation
- Section 3 (Comments):** This section contains a large text area for entering comments.
- Section 4 (Enter New Client Button):** A button labeled "Enter New Client" is located at the bottom right of the form.

Red annotations are present: a large red bracket on the left side groups the three main sections (1, 2, and 3), and a red number 4 points to the "Enter New Client" button.

This is the Enter New Client interface. In this interface the user will enter the details of the client in the corresponding boxes. After filling out all applicable boxes press the Enter New Client button marked by a #4 to insert the new client information into the database.

NOTE: First Name, Last Name, and Date of Birth are required fields.

The user can make a new client by:

1. Type in client information to make a client such as their name, Phone Number, or Street Address.
2. Click each box corresponding to the programs the client is receiving.
3. The user can enter extra comments for the client in this box.

4. Search a Client

The screenshot shows a web application window titled "Search Client". It contains two main sections: "Client Information" and "Comments". The "Client Information" section has several input fields for client details, including Date Admitted, Last Name, First Name, Street Address, P.O. Box, Apartment Number, City, State (a dropdown menu), Zip Code, Date of Birth, Income, Marital Status (a dropdown menu), and Phone Number. The "Comments" section is a large text area. A red bracket labeled "1" highlights the "Client Information" section. A red bracket labeled "2" highlights the "Comments" section. A red box labeled "3" highlights the "Search Client" button located at the bottom right of the form.


This is the Search Client interface. In this interface the user will enter the details of the client in the corresponding boxes. After filling out all applicable boxes press the 'Search Client' button marked by a #3 to find the client in the database

The user can search for individual clients on this page:

1. Type in client information in connection with the client.
2. Type in comments related to the client.
3. Press Search Client when done.

5. Edit a Client

Search Results														
	ClientID	LastName	FirstName	Address	AptNumber	POBox	City	State	ZipCode	PhoneNumber	DateOfBirth	Income	MaritalStatus	Hours
▶	7472		ndez		Rd		Clover	SC	29710	57	/01	1268.00	Single	1
	7503						Edgemoor	SC	29720	30	/13	1268.00	Widow	2
	7429						Fort Mill	SC	29715	51	/05	1100.00	Single	4
	7460		ny	Rd			Fort Mill	SC	29708	25	/04	900.00	Single	1
	7475		hald	load			Hickory Grove	SC	29720	30	/16	848.00	Widow	1
	7496			rive			Rock Hill	SC	29707	30	/12	900.00	Single	1
	7453		is	pt 236			Rock Hill	SC	29730	23	/04	940.00	Widow	2
	7418		hna				Edgemoor	SC	29712	51	/03	1400.00	Single	1
	7489			Apt 111			Rock Hill	SC	29715	39	/26	1314.00	Single	1
	7495			oad			Kershaw	SC	29730	30	/16	3335.00	Widow	2
	7420			e			Chester	SC	29706	18	/13	1400.00	Widow	1
	7488		s	urt			Indian Land	SC	29730	24	/13	800.00	Widow	1
	7464	son		st 6-e			York	SC	29745	42	/14	940.00	Single	1
	7492			ne			Rock Hill	SC	29715	38	/16	800.00	Single	1
	7439						Lancaster	SC	29720	24	/24	1268.00	Widow	1
	7452						Fort Mill	SC	29715	23	/08	940.00	Single	4
	7408						Chester	SC	29706	45	/19	1400.00	Single	2
	7410						Chester	SC	29706	33	/29	3000.00	Single	1
	7415						Great Falls	SC	29055	35	/09	3400.00	Widow	1
	7432		lm				Lancaster	SC	29720	57	/31	900.00	Married	3
	7491						Fort Mill	SC	29730	34	/12	1816.00	Widow	2
	7416						Great Falls	SC	29055	50	/10	1893.00	Single	1
	7457		is	Dr Apt 108			Rock Hill	SC	29730	22	/23	1816.00	Single	1
	7485			quare Lane			Charlotte	SC	29720	39	/13	1314.00	Widow	2
	7419			Road			Great Falls	SC	29055	39	/24	1115.00	Single	1
	7430						Lancaster	SC	29720	29	/21	848.00	Single	2
	7504			ld			Indian Land	SC	29720	30	/29	1314.00	Single	2
	7479			ad			Rock Hill	SC	29732	39	/16	1100.00	Single	1
	7463		n				York	SC	29745	35	/04	940.00	Widow	2
	7447			pt 235			Rock Hill	SC	29730	56	/15	800.00	Married	2
	7466			pt 64			York	SC	29745	75	/10	1314.00	Single	1
	7470			pt. 208			Rock Hill	SC	29730	33	/05	1325.00	Married	1
	7467		n	319			Rock Hill	SC	29730	30	/06	800.00		
	7454	berry	is	Highway			York	SC	29745	57	/05	800.00		
	7481		ard	Apt 102			Clover	SC	29706	30	/12	800.00		

 Edit Client

1

The user can look up all the clients in the database. The user then can click on any client highlighted with the color blue and press the 1 button to ‘Edit Client’ button.

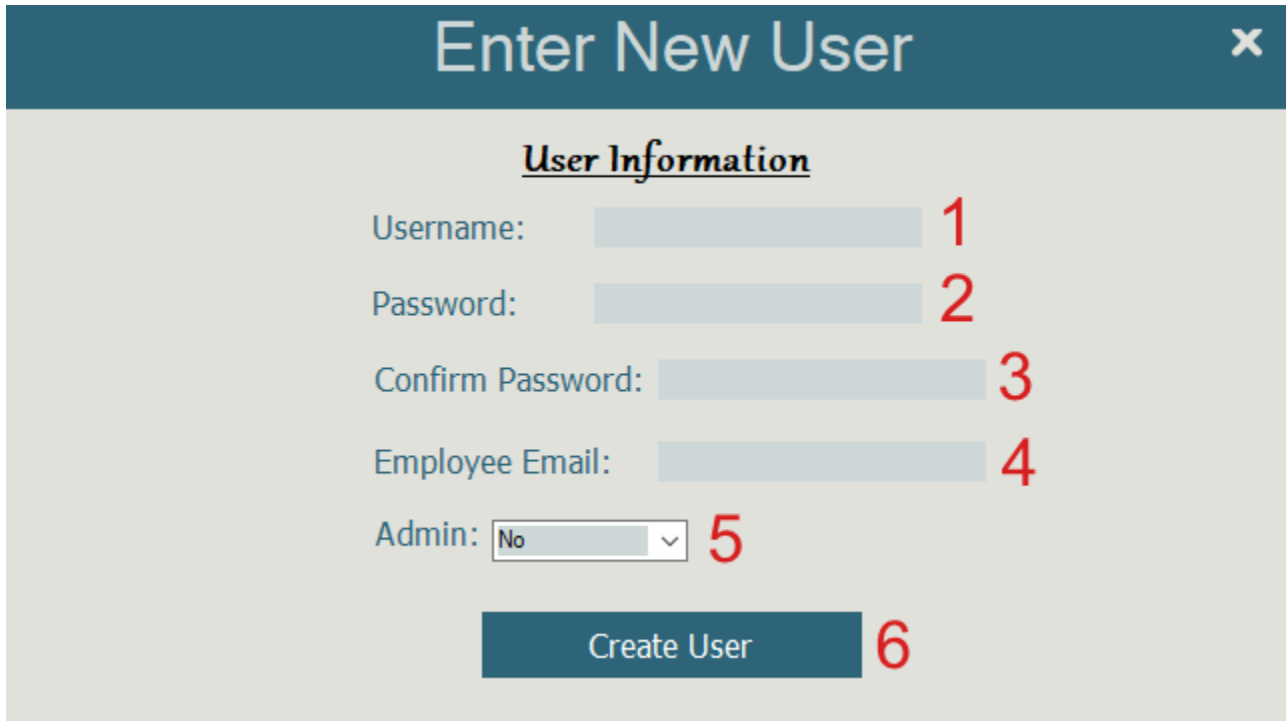
7. Importing Files

The screenshot shows a window titled "Select a CSV file to import" with a close button in the top right corner. Below the title is a text input field (labeled 2) and a "Browse" button (labeled 1). Below these is the text "Records Imported: NA". A large text area (labeled 3) contains the instruction "To begin, enter the filepath and click import or browse for a .csv file above." At the bottom are two buttons: "Import" (labeled 4) and "Done" (labeled 5).

The user can import CSV files from their computer. This is the Import interface. In this interface the user will enter the details and press buttons to import files. Press the Import button marked by a #4 for the system to import the files when steps are completed.

1. Browse into their desktop to find the CSV file to import.
2. This box will display the file path of the chosen CSV file.
3. This box will display all errors found during the import and what lines in the CSV file they can be found in.
4. Press 'Import' to import their file to the program.
5. Press 'Done' to exit the importing page.

8. Enter New User *Admin Only*



The screenshot shows a web form titled "Enter New User" with a close button (X) in the top right corner. The form is titled "User Information" and contains the following fields:

- Username: [text input] 1
- Password: [text input] 2
- Confirm Password: [text input] 3
- Employee Email: [text input] 4
- Admin: [dropdown menu with "No" selected] 5
- [Create User button] 6

This interface is for the creation of a new STAFF or ADMIN account. **Note:** Users' passwords must be at least 8 characters long, contain at least 2 capital letters, at least 1 special character, and at least 2 numbers.

1. Enter a Username for the newly created account.
2. Enter a Password for the newly created account.
3. Enter the same password as above to verify it has been typed correctly
4. Enter the email address that will be associated with the new account.
5. Select if the new account will be given ADMIN privileges or not.
6. Click 'Create User' to finish creation of the new user account.

9. Edit a User *Admin Only*

The screenshot shows a web interface titled "Edit User" with a close button (X) in the top right corner. The interface is divided into two main sections: "Enter Username" and "User Information".

Enter Username: This section contains a text input field labeled "Username:" followed by a red number "1". To the right of the input field is a blue button labeled "Search User".

User Information: This section contains three input fields: "Username:", "Employee Email:", and "Admin:". The "Admin:" field is a dropdown menu currently showing "No". To the left of these fields is a large red bracket with a red number "2". To the right of the "Username:" and "Employee Email:" fields is a blue button labeled "Delete User" with a red number "4". Below the "Admin:" dropdown is a blue button labeled "Save Edit" with a red number "3".

This interface is used to edit an existing USER or ADMIN account. **Note:** Users' passwords must be at least 8 characters long, contain at least 2 capital letters, at least 1 special character, and at least 2 numbers.

1. Enter the username of the associated account and click 'Search User'.
2. If the account was found, the user can change the username, email, and ADMIN status associated with the account.
3. Click 'Save Edit' to save any changes made in this interface.
4. Click 'Delete User' in order to delete the account that was searched in #1.