Case Management PRO

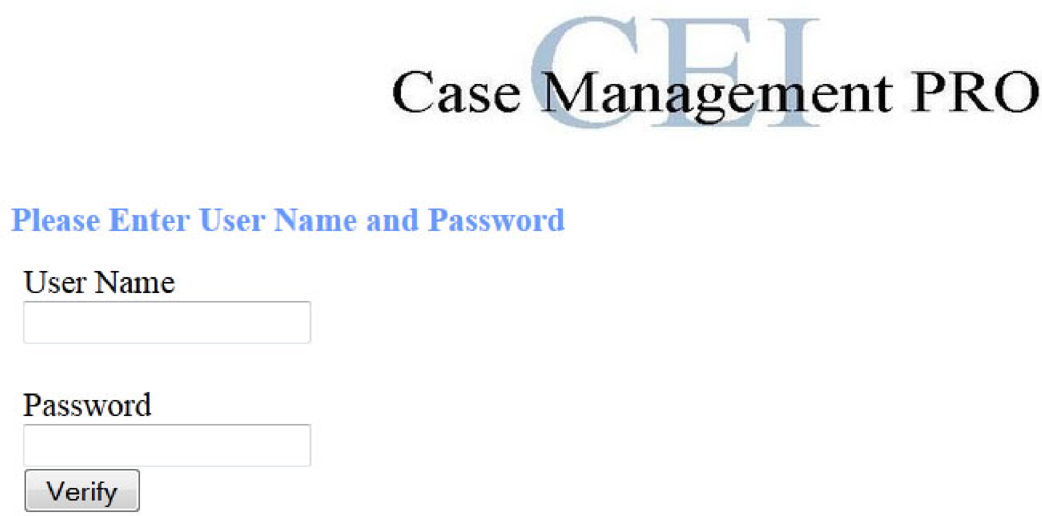
USER'S GUIDE

Web Address: **PurposefulParenting.casemgntpro.com**

LOGGING IN

You will be issued a User Name and Password. Your password is case sensitive.

1. Type in your User Name
2. Hit Tab (to move to the Password field)
3. Type in your password
4. Hit Enter or Click Verify
5. If you are inactive for more than 20 minutes the system will make you login again.
6. You will have to change the password every 90 days. It cannot be the 2 previous passwords



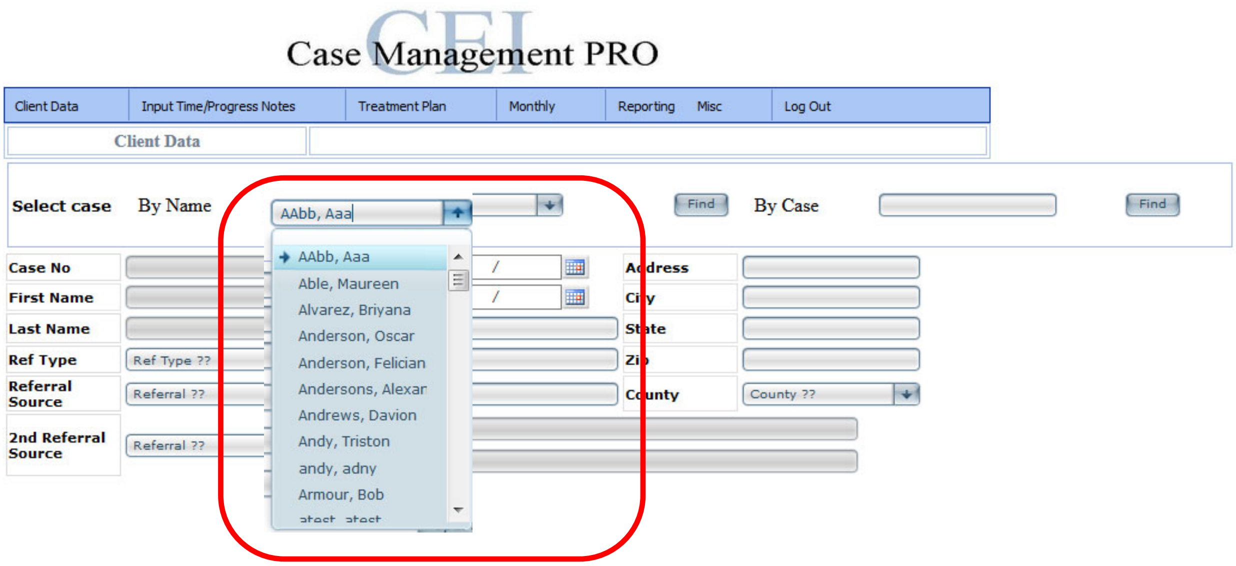
Invalid user and password error

If your User Name or Password is incorrect, you will get an error message listed next to verify. Please check your User Name and Password and try again. Check to make sure that your CAPS LOCK is not turned on. Remember, your password is case sensitive.

CLIENT DATA

Client Data

When you first log in you will be taken to the Client Data Form. You can choose your case from the Name drop down box or by entering the Case Number in the “By Case” Text box. Once you have entered this, click the Find button.



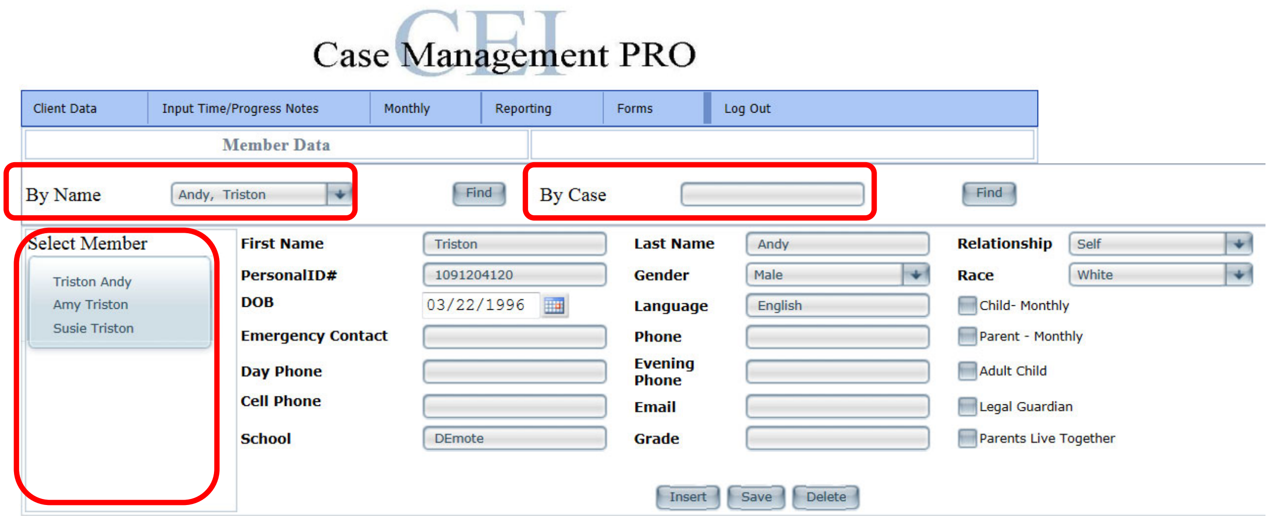
(If you see any problems call the office and they will make the corrections.)

MEMBER

Member Data

When viewing members:

1. Choose the client by the Name dropdown , Then click Find –OR–
2. Enter the Case number, and then click on Find.
3. The Members for that case will be listed in the Select Member Pane.
4. Click on one of the Members in the list and their data will be displayed.



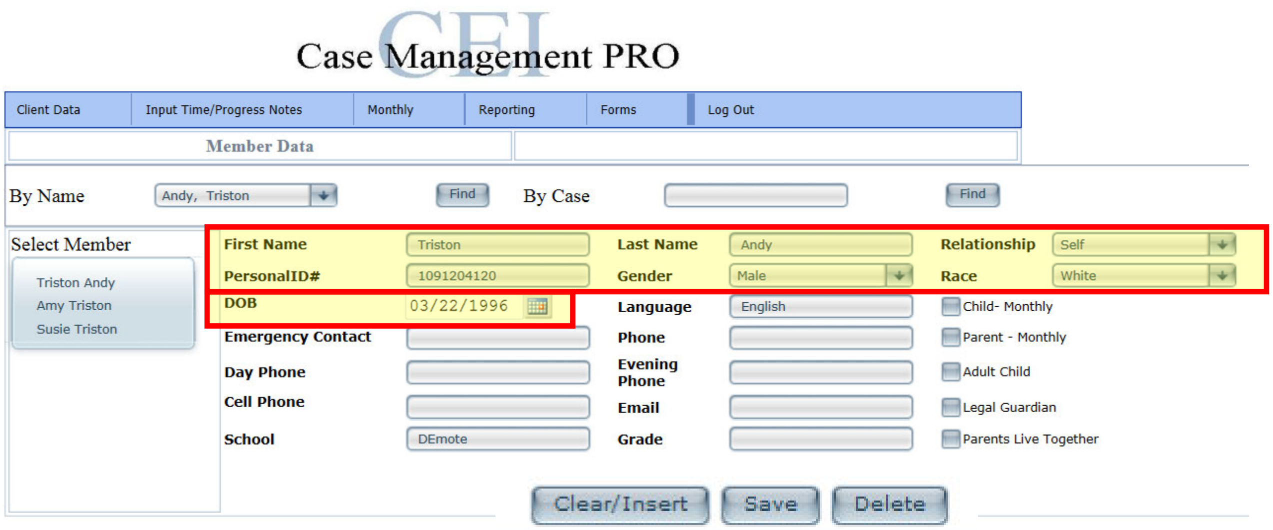
When adding a new member, some fields are required which are highlighted below. You will not be able to update your record until these fields are filled in.

1. First Click on Insert to clear the form to add the member.
2. As you are adding a new member, you can use your tab key to move from field to field.

   Drop-Down Boxes:
   When you get to fields that have a dropdown arrow, you are required to choose one of the choices listed. You have 3 choices to do this:
   1. You can click on the drop-down arrow and choose.
   2. If you know that it's the mother, you can also type and "M" and it will automatically fill in the first entry that begins with an "M". If is not the first entry, you will need to click on the down arrow and choose.
   3. You can also click the down arrow on your keyboard until the choice that you want shows in the dropdown box.

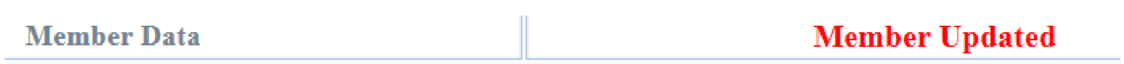
   Check Boxes:
   When you get to fields that have check boxes, you can click on the box and it will check (click again and it will uncheck). If you are tabbing through the fields, you can hit the spacebar and it will check the box.

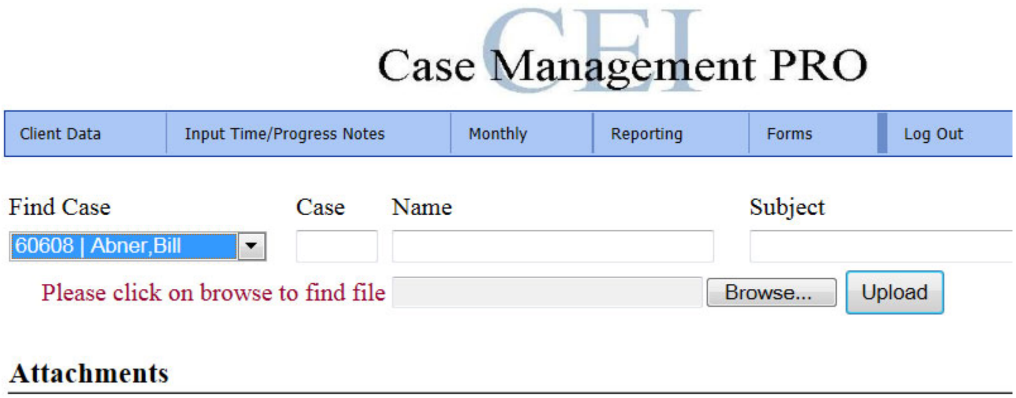
Date Fields:
When you have to fill in a date field, you can type in the date. It will automatically take you to the next date area. If you need to see a calendar, you can click on the calendar icon next to the date and it will show you a calendar. Use the left and right arrows next to the month at the top to navigate.



Make sure to Hit Clear/Insert before you enter a new member

Save:
Click Save after you make changes to an existing member or if you have added a new member to save your changes. Edits will be applied. If you are missing any data, you will see an error message. If the edits pass, you will see a Message that says the member has been updated or inserted.





Attachments:

To add an attachment to a case chose attachment from the client menu:

1. Choose your case.
   a. That will fill in the Case Nrb , Name and Subject
2. Click on Browse to find the PDF you want to add.
3. Click on Upload.
4. You will then see your file listed under the attachment section.
5. You can then click on it to see the document.

Treatment Plan

The Treatment plan has 2 menu items.

1. Treatment Plan. This is where you will be entering your main treatment data, along with your goals and objectives.
2. Treatment Details. This form will be used to display a list of all your treatment plans and their status. This is very similar to your monthly detail.
3. Treatment Plan Report. This will be the form you will use to get signatures and to print your Treatment plan Report.

Treatment Plan

To add a new treatment plan:

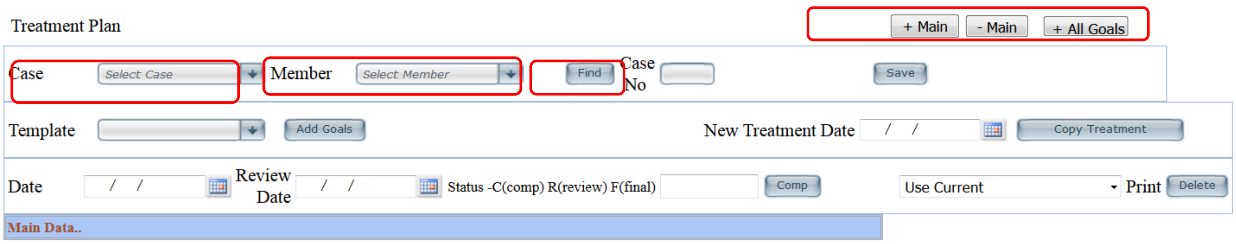
1.First you must check to see if a treatment plan has already been entered for that Case/Member.

a. Select the Case, then the member Click on Find.

b. You should receive a message

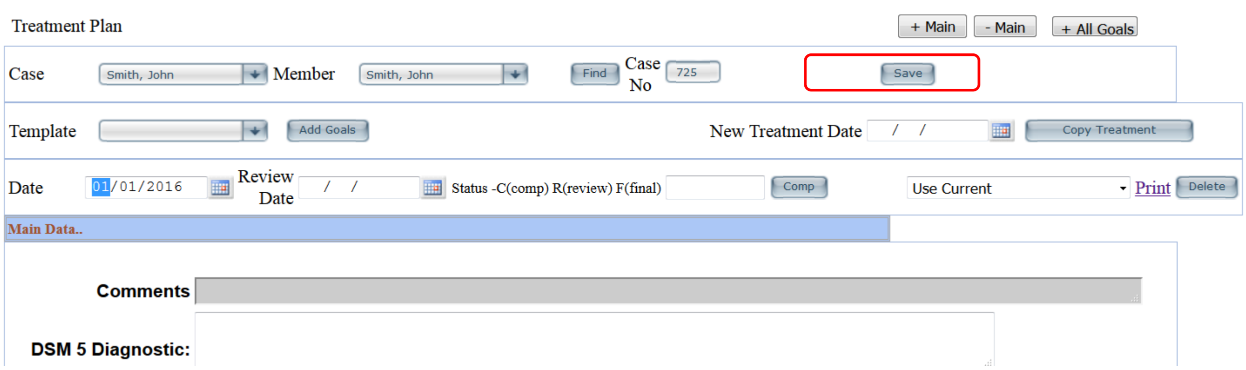
c. No Treatment Found and your screen should expand to see additional fields.

d. At any point you can expand or collapse your main data by clicking on the + main or – main button. This will allow you to see your goals and objectives without scrolling



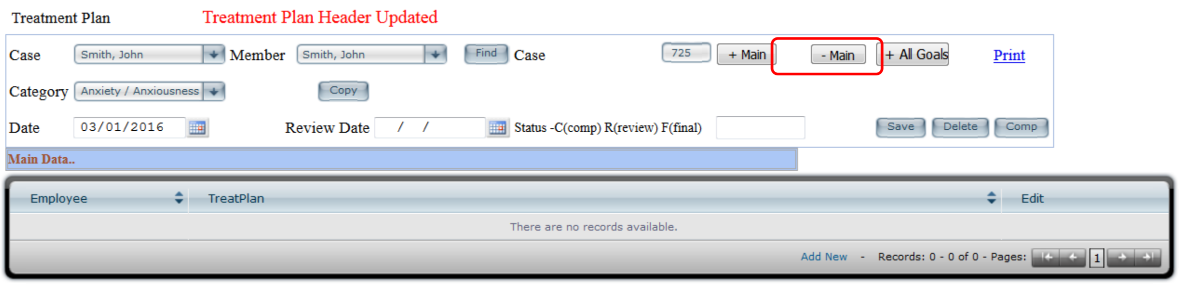
Your screen will now look like this.

1. Enter in your data then Click on Save
    a. Date
    b. Review Date
    c. Any Main Data
2. You should get a message Treatment Plan Header Updated.
3. DO NOT CLICK ON ADD GOALS UNTIL YOU SAVE THE HEADER DATA

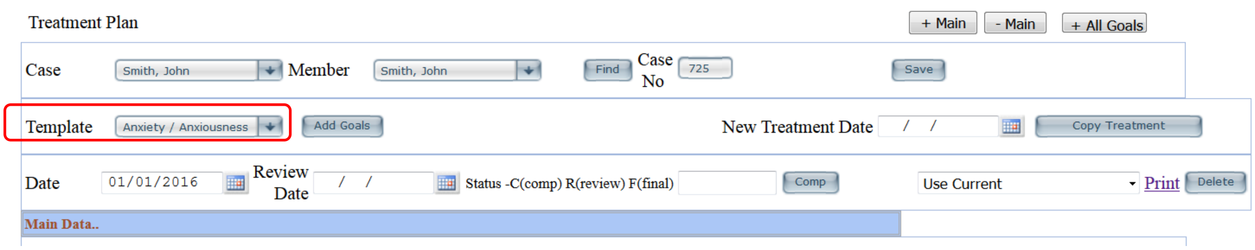


Treatment Plan Goals and objective.

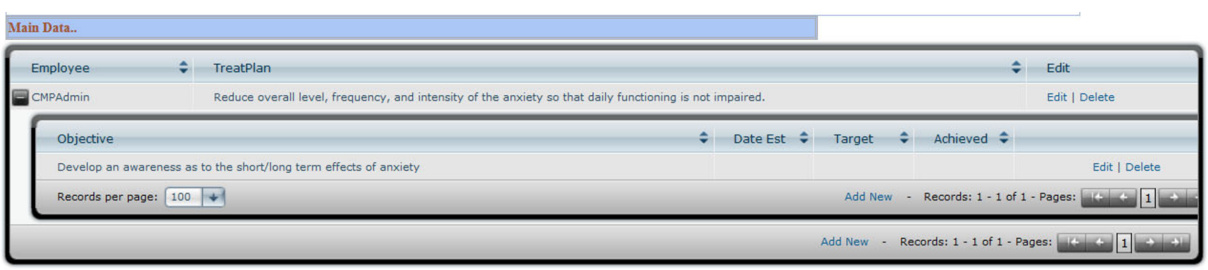
1. Click on the – Main Button. This will make it easier to see the goal section



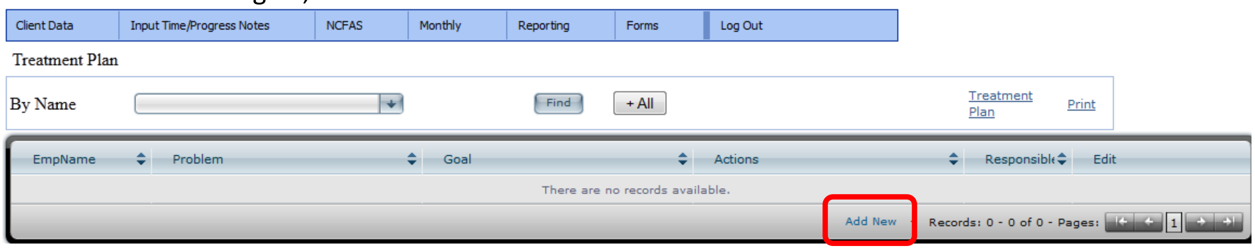
To use one of the Templates, choose your template and then click on Add Goals



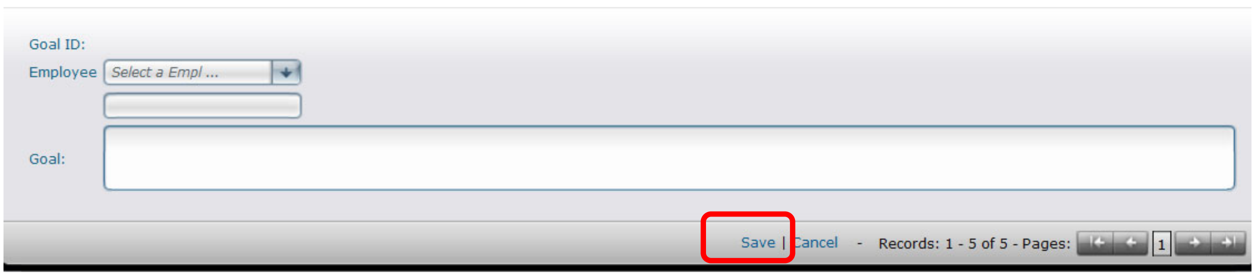
That will populate your treatment plan with the goals and objectives from that template. Click on the + sign by your name to expand the objectives.



To add an additional goal, Click on add new.

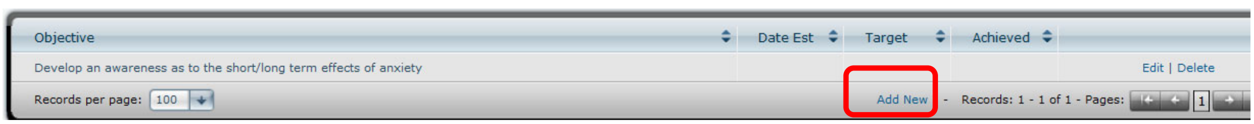


The following form will be displayed. Choose your name from the Drop Down box, Enter in your goal Then click on save.

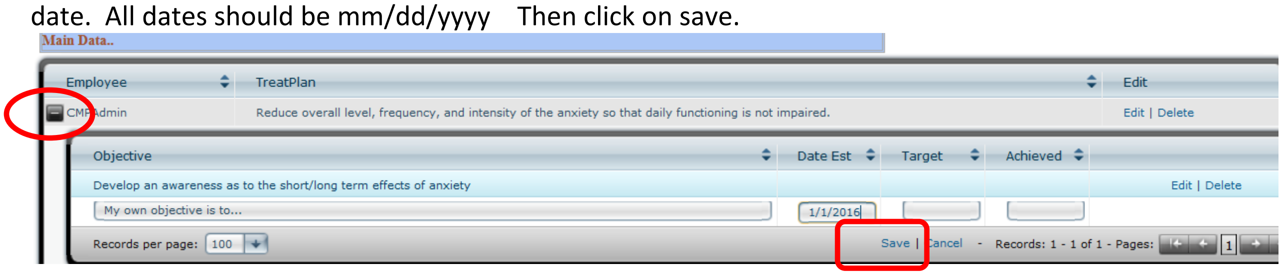


Continue this process until all goals have been entered.

Click on the + sign by your name to expand or add the objectives. Click Add New

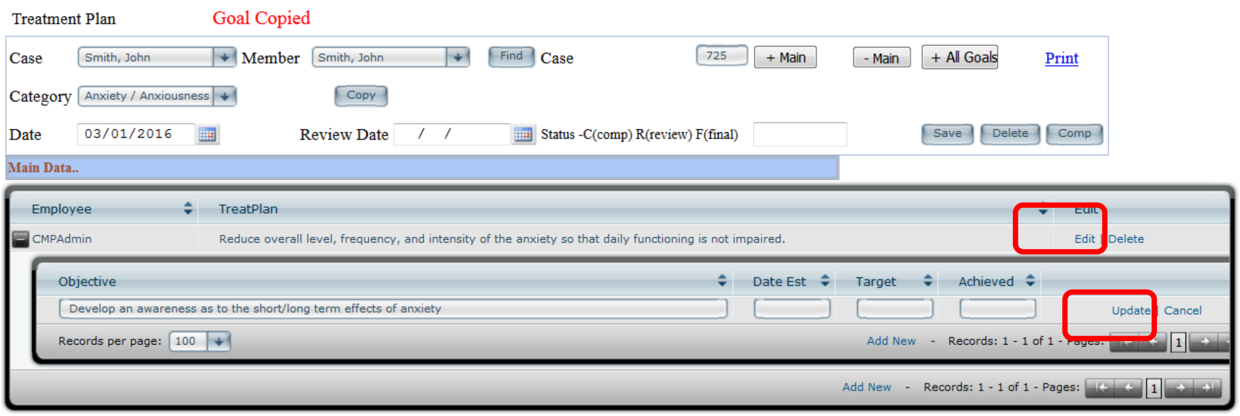


The following form will be displayed. Enter your objective, the date it was established and the target date. All dates should be mm/dd/yyyy Then click on save.



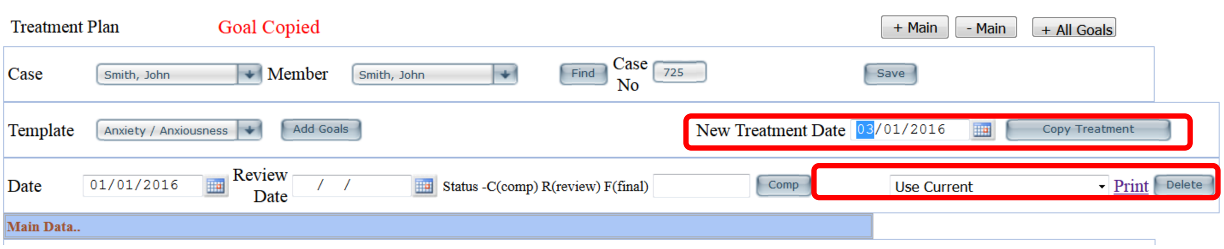
Editing your Goals and or Objectives.

To edit a goal or objective click on edit, make your changes then click on update.



Updating your Treatment Plan.

1. When Reviewing and updating a New Treatment plan (Ie Every 90 days) you will need to do the following
   a. Make sure all the data is correct for the current plan. (You will not be able to change them after the copy is complete)
   b. Enter the new Treatment Date
   c. Click on copy treatment.
   d. This will change the treatment plan date and Clear all Signatures.
   e. You will now need to make any changes , add /delete goals etc…….
   f. To print/View a previous Treatment plan, Click the drop down where you see "Use Current" and choose the Previous treatment plan



Treatment Plan Details.

This form works just like the monthly details. Click on the case id to bring up the Treatment Plan

Treatment Plan Detail

Back to Previous Page

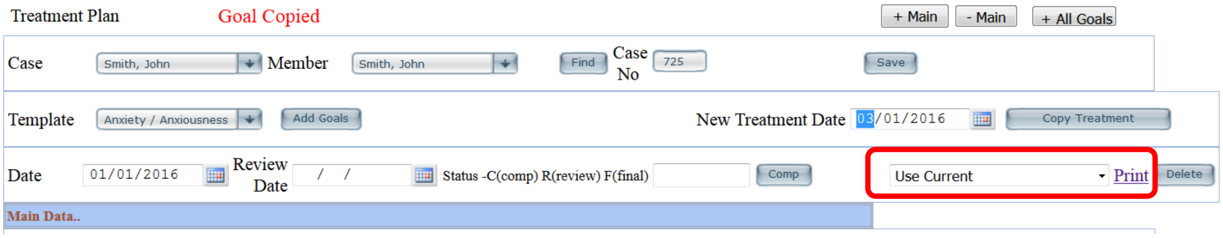
Select Staff [redacted]

Client FirstName	Client Last Name	Case No	Date	Status	#Days since Upd	Case Id
Clinton	[redacted]	1617	7/12/2013	C	95	1617

Printing

a. To print the Current Treatement Plan, Choose “Use Current” . Then click Print.

b. To print a previously treatment Plan , Choose the date from the dropdown and then click on Print. This will bring up a previously saved Treatment Plan.



Your report will something like this

Your Company Name

Case # 725

Client John Smith

Date 3/1/2016

Review Date

Diagnosis (DSM IV)

DSM 5 Diagnostics The Diagnostic is that John Needs Help

Past Tx/Current Meds

Depressed

Presenting Problems

None

Client Strengths/Supports

Therapy

Treatment Strategies

Family

Intervention Type/Frequency:

NOne

Discharge Criteria:

Happy

Aftercare Plan:

None

Goals and Objectives

Goal #1 Reduce overall level, frequency, and intensity of the anxiety so that daily functioning is not impaired.

Goals and Objectives

Goal #1 Reduce overall level, frequency, and intensity of the anxiety so that daily functioning is not impaired.

Objective	**Staff**	**Date Est**	**Target**	**Achieved**
Develop an awareness as to the short/long term effects of anxiety	CMPAdmin			
My own objective is to...	CMPAdmin	01/01/2016		

X	Clients Signature	Date:
X	Guardian/parent Signature	Date:
X	Therapist:	Date:

This information has been Disclosed to you from records protected by federal confidentiality rules (42 CFR Part 2). The federal rules prohibit you from making any further Disclosure of this information unless further Disclosure is expressly permitted by the written Consent of the person to whom it pertains or as otherwise permitted by 42 CFR Part 2. A general authorization for the release of medical or other information is NOT sufficient for this purpose. The Federal rules restrict any Use of the information to criminally investigate or prosecute any alcohol or drug abuse client.

Signatures

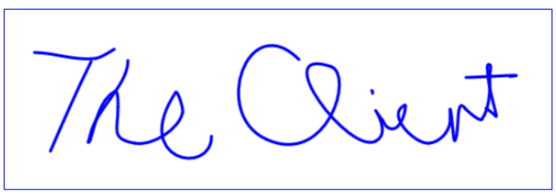
1. Client and Guardian/Parent
    a. Click on X , The Following Form will be displayed.
    b. Use your mouse to sign in the box,
    c. Click on Save.
    d. IF the Client does not like their signature. Click clear and try again.

Signature

MrNo 1

Client

Your Sign



Signature OK.

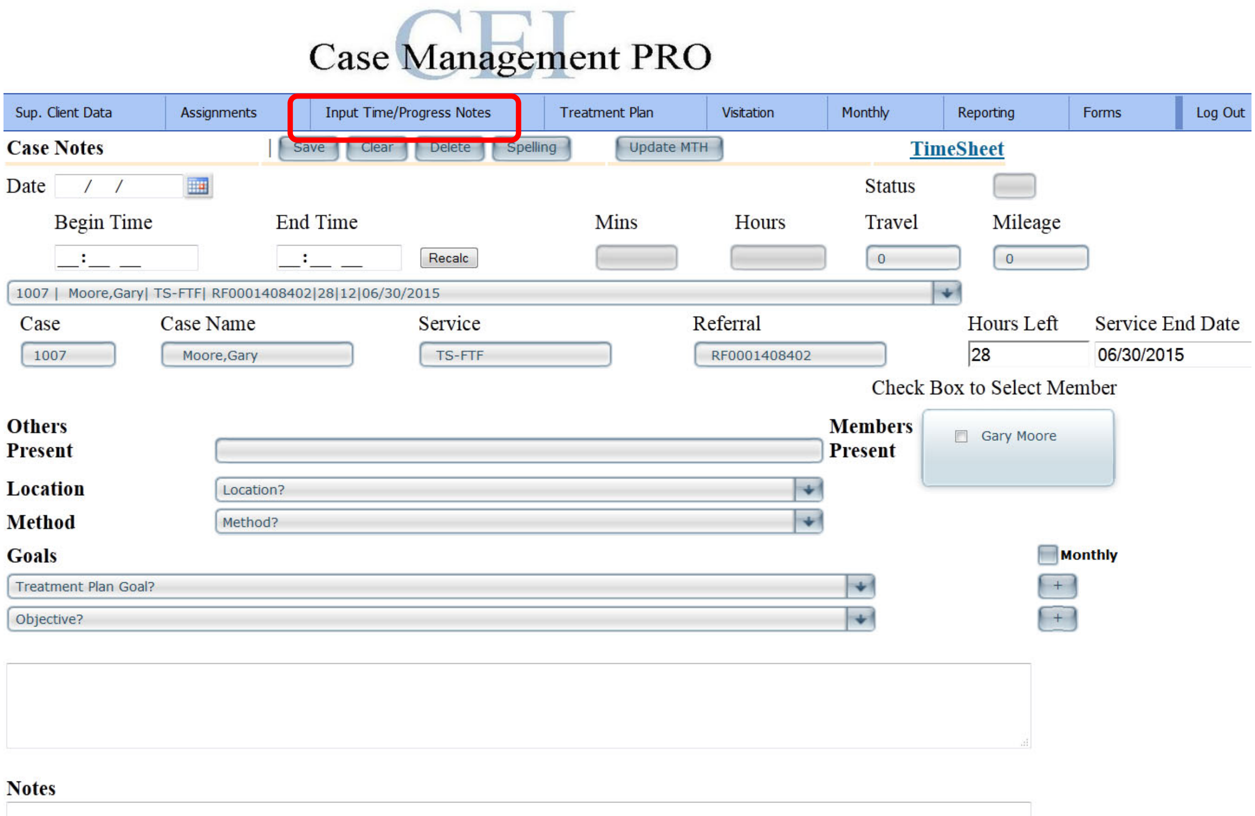
Save Clear 1

The Report should now have their signature and today's date.

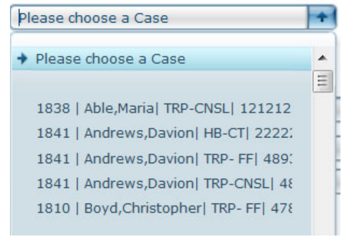
X	Clients Signature		Date: 3/2/2016
X	Guardian/parent Signature		Date:
X	Therapist:		Date:

2. Therapist
    a. Enter the date and then Click on the X your signature will be extracted from your employee signature on file (see Page 35)

INPUT TIME/PROGRESS NOTES / Visitation



1. Click on Input Time/Progress Notes.
2. Type in the date.
    a. You have the option of clicking on the calendar
3. Type in your begin time.
    a. If it is less than 10, type a zero first i.e. 06, this will automatically move you to the next field.
    b. You will need to put AM or PM.
        i. An A or a P will do the trick.
4. Type in your end time.
    a. If it is less than 10, type a zero first (06), this will automatically move you to the next field.
    b. You will need to put AM or PM.
5. The minutes and hours will calculate.
    a. This is done per ¼ hour.

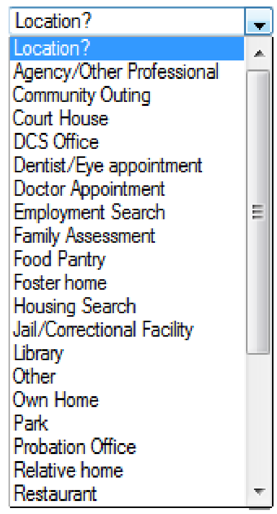


6. Click on the down arrow and choose the Case.
   a. This will Display the Case Name.
   b. This will display the referrals.
   c. This will also show you the remaining hours left on the referrals and End Date of the Referral.

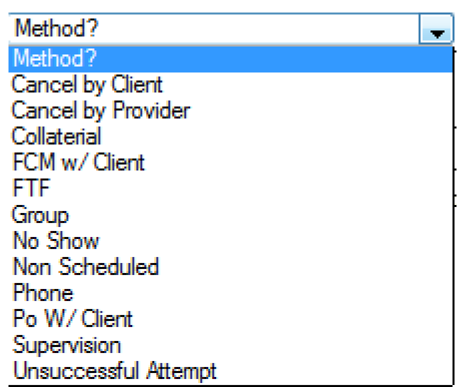
   d. If you choose a Service that requires a visitation note Skip to the Visitation section Page 19.

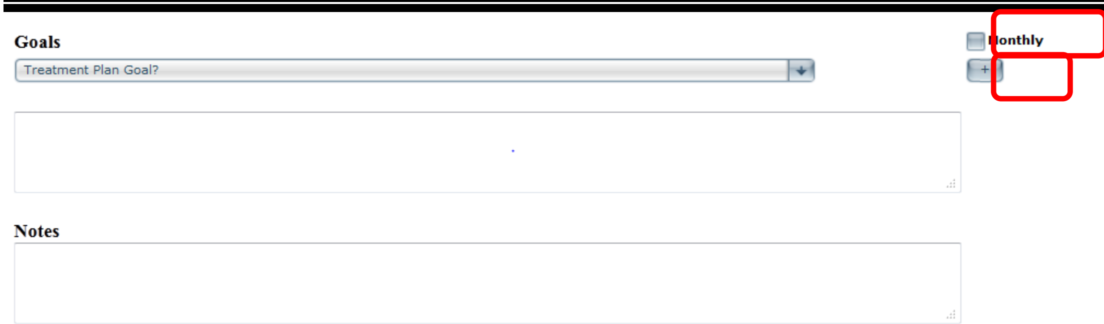
7. To Choose the Members Present, Click on the member's checkbox.

8. Click on the down arrow and choose the Location.



9. Click on the down arrow and choose the Method.



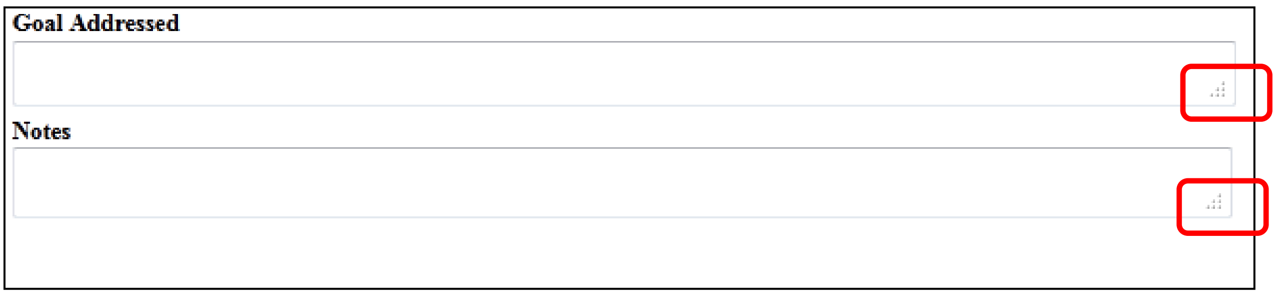


10. If you have entered in your treatment plans and/or Objective, Click the dropdown , choose the treatment plan and then click the + Sign. This will add the goal into the textbox. If you need to add additional data you can do that also.
11. If you want this progress note to be displayed in the monthly click the Checkbox called monthly. This if very important if you want this note to display on the monthly report. The system will match the Case , Service and treatment plan Goal you enter her and then the same on your monthly. See monthly report for more details…
12. Add the Notes.
13. Click on Save.
    a. You will get a message Record Save. Do not continue until you see this message!

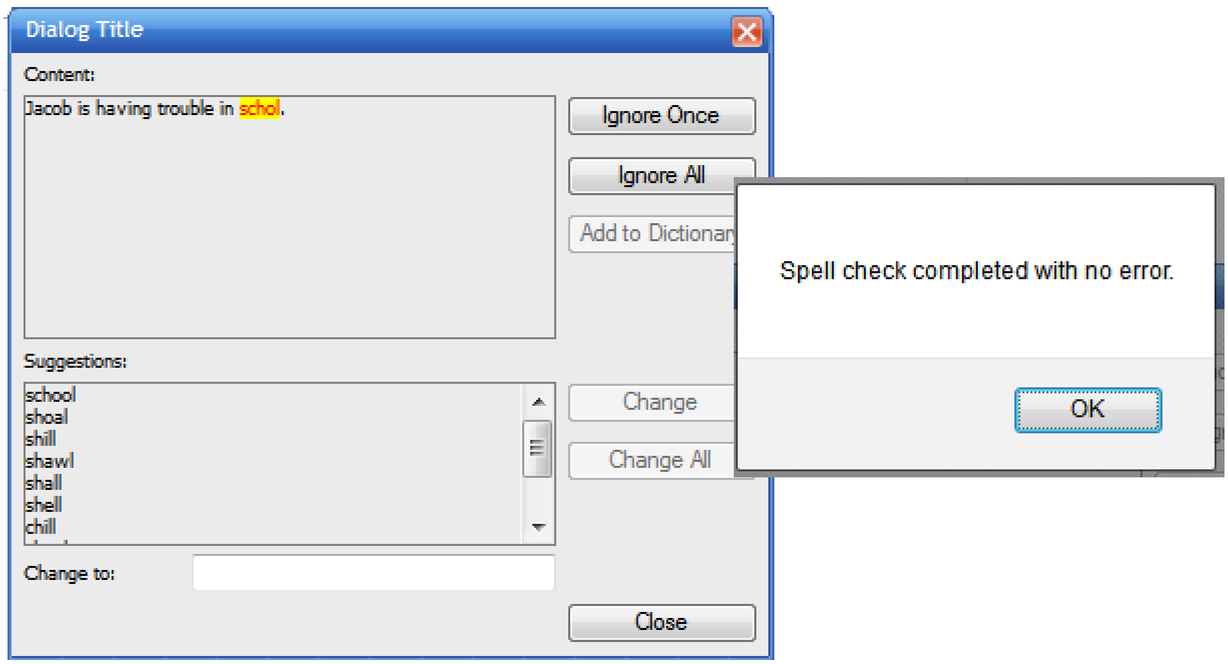
Expand the Dialog Box:

If you see a series of dots in the lower right hand corner of a dialog box that means you can expand the box to see more of you data.

1. Point to the dots.
2. Your mouse will turn into a double headed arrow.
3. Click and drag down until the dialog box is large enough to see all your text.
4. Text Boxes have character limits. If you see something like *** 8000 Characters, you will need to reduce your characters to less than 8000 to be able to save.



Spell:
You should run a spell check on your form before you add it. It will give you a dialog box to correct any errors, or simply tell you it's complete with no errors.

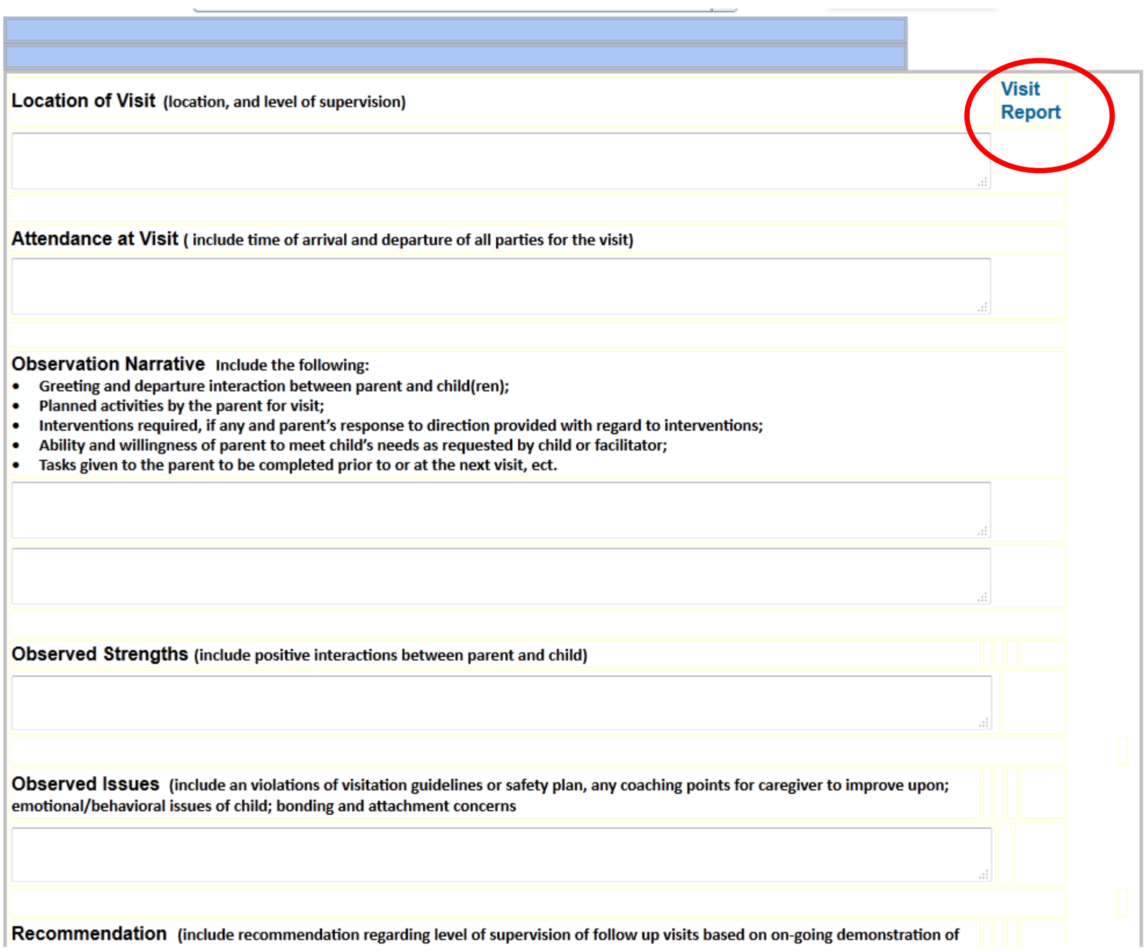


Visitation Notes:

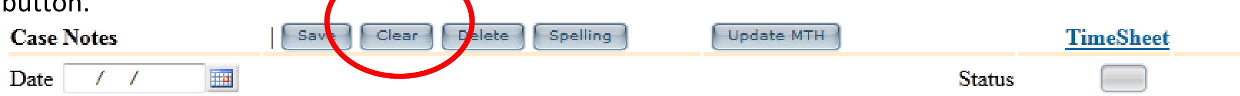
When you choose a service that requires a visitation Note the bottom portion of the form will look like this.

You must enter the following data.

1. ALL fields are mandatory
2. Once Complete click the save button like normal notes.
3. To print your visit note. Click Visit Report. This will take you to the Visit Report where you can print your Report.

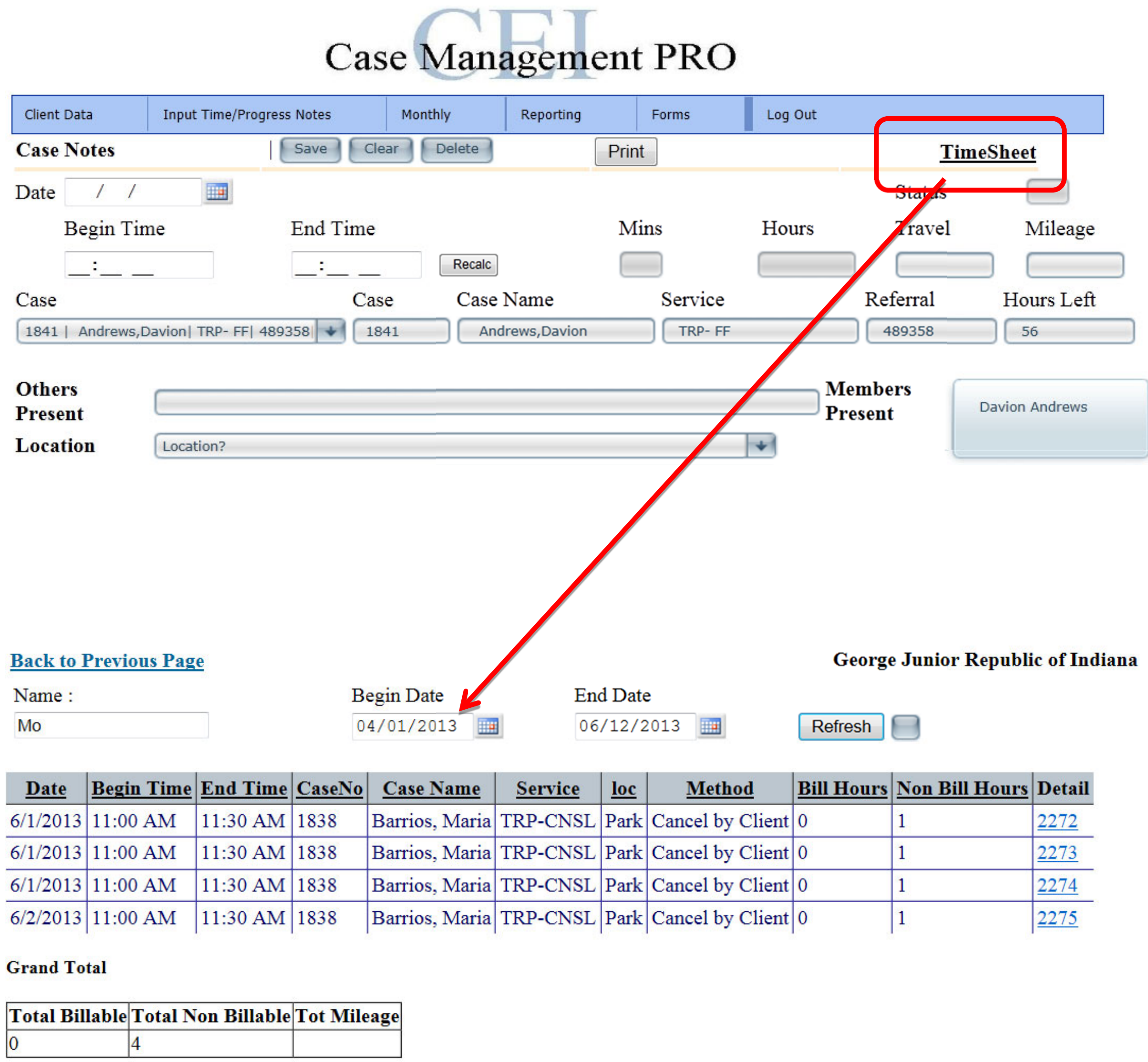


After you return from printing your report, if you want to add another record you must hit the clear button.



Timesheet:

Click on Timesheet to see a listing of your input time.



Case Management PRO

Client Data | Input Time/Progress Notes | Monthly | Reporting | Forms | Log Out

Case Notes | Save | Clear | Delete | Print | TimeSheet

Date / /

Status

Begin Time | End Time | Mins | Hours | Travel | Mileage

__:__ __ | __:__ __ | Recalc

Case | Case | Case Name | Service | Referral | Hours Left

1841 | Andrews,Davion| TRP- FF| 489358 | 1841 | Andrews,Davion | TRP- FF | 489358 | 56

Others Present

Members Present: Davion Andrews

Location: Location?

Back to Previous Page

George Junior Republic of Indiana

Name : Mo

Begin Date 04/01/2013

End Date 06/12/2013

Refresh

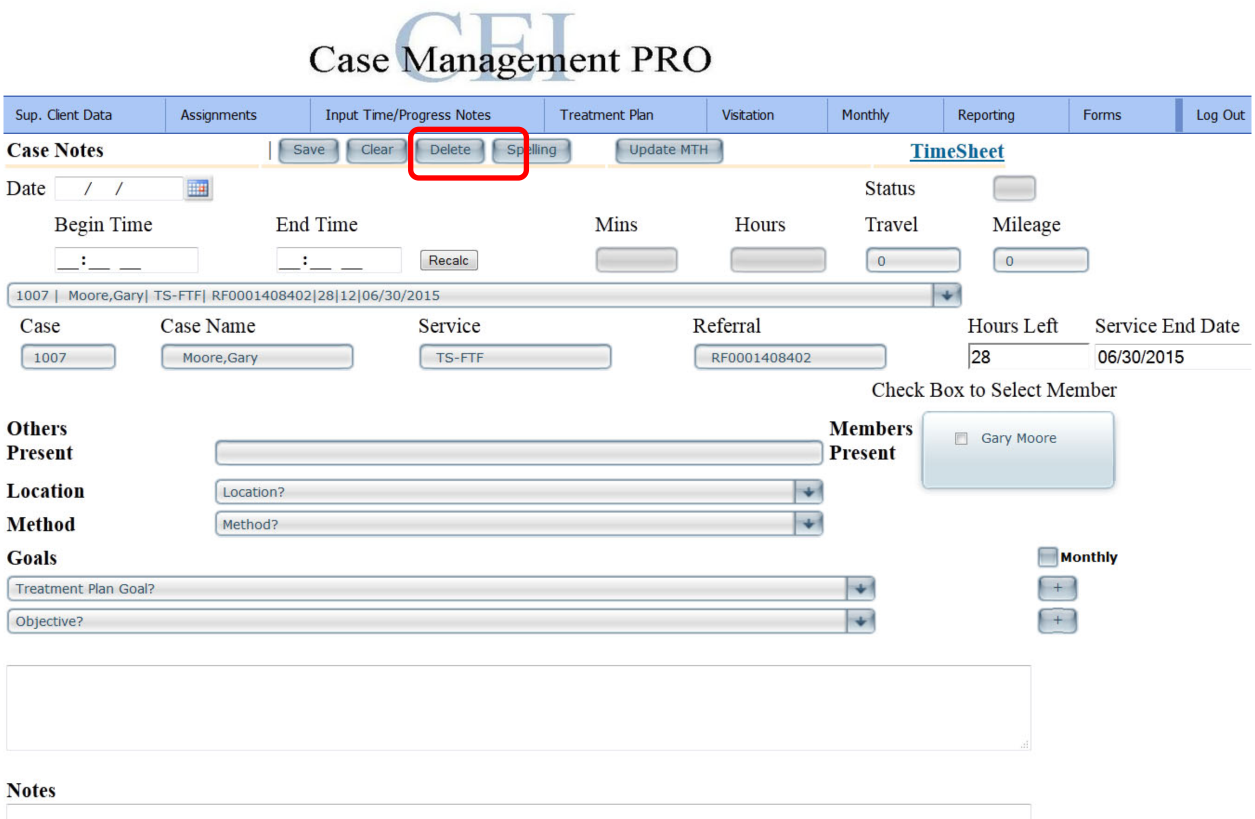
Date	Begin Time	End Time	CaseNo	Case Name	Service	loc	Method	Bill Hours	Non Bill Hours	Detail
6/1/2013	11:00 AM	11:30 AM	1838	Barrios, Maria	TRP-CNSL	Park	Cancel by Client	0	1	2272
6/1/2013	11:00 AM	11:30 AM	1838	Barrios, Maria	TRP-CNSL	Park	Cancel by Client	0	1	2273
6/1/2013	11:00 AM	11:30 AM	1838	Barrios, Maria	TRP-CNSL	Park	Cancel by Client	0	1	2274
6/2/2013	11:00 AM	11:30 AM	1838	Barrios, Maria	TRP-CNSL	Park	Cancel by Client	0	1	2275

Grand Total

Total Billable	Total Non Billable	Tot Mileage
0	4	

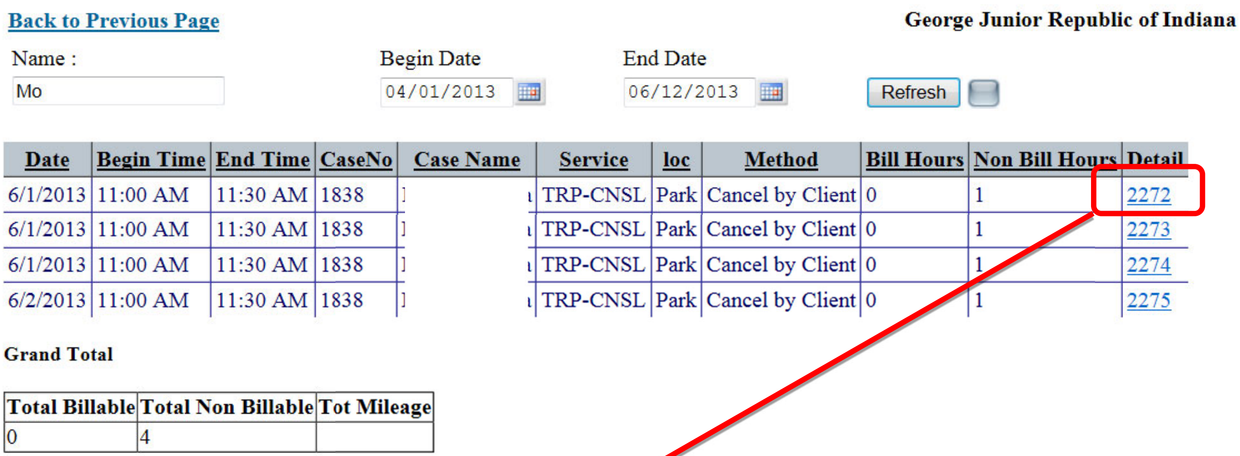
Delete Input Time:

If you made a mistake and you want to delete the time record, find the record on the time sheet and click on the Detail record id and you will be taken to the input time/progress notes. Click the Delete button. You will then get a message that the record has been deleted.



Edit Detailed Entry:

You can edit your detailed entry by clicking on the numbers located under detail in the entry. This will take you back to the Input form but it will now display that record and allow you to update any information.



Back to Previous Page

George Junior Republic of Indiana

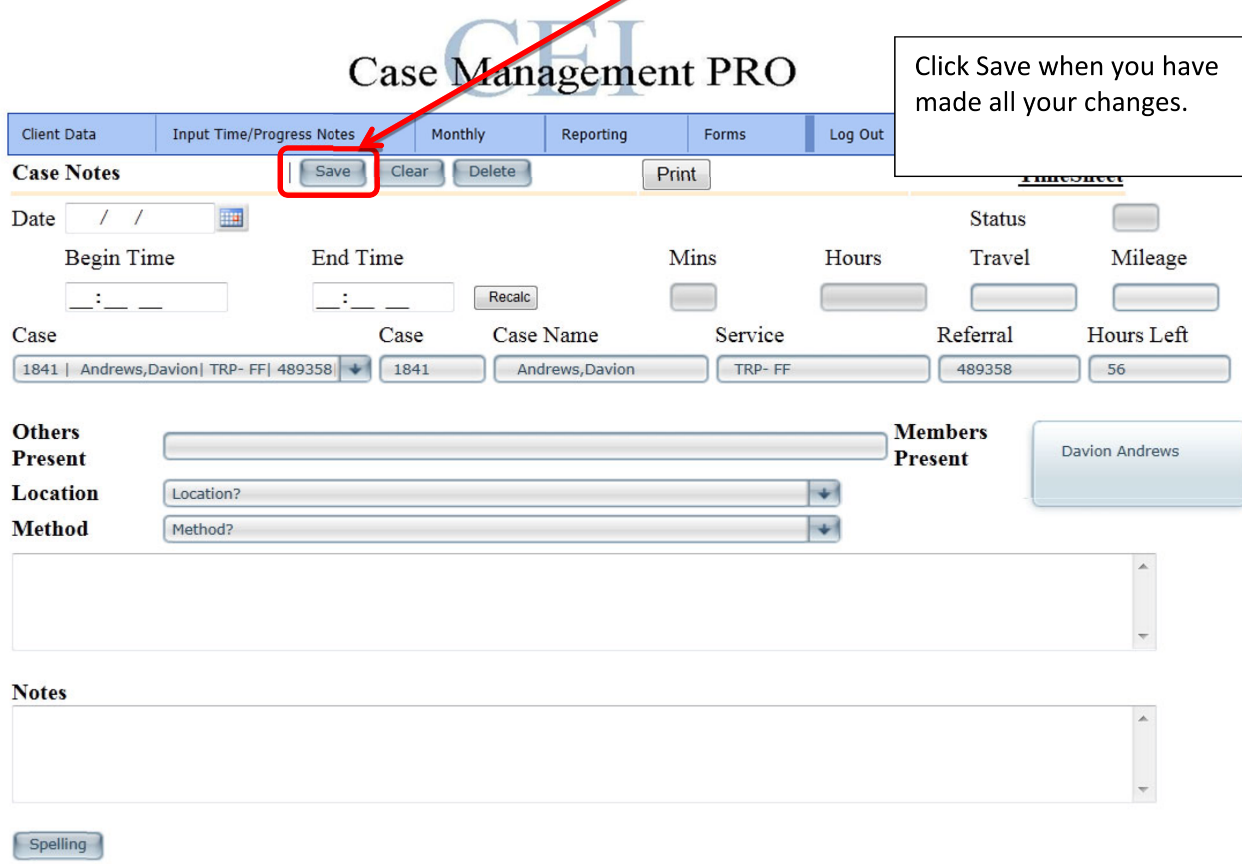
Name : Mo

Begin Date 04/01/2013 End Date 06/12/2013 Refresh

Date	Begin Time	End Time	CaseNo	Case Name	Service	loc	Method	Bill Hours	Non Bill Hours	Detail
6/1/2013	11:00 AM	11:30 AM	1838		TRP-CNSL	Park	Cancel by Client	0	1	2272
6/1/2013	11:00 AM	11:30 AM	1838		TRP-CNSL	Park	Cancel by Client	0	1	2273
6/1/2013	11:00 AM	11:30 AM	1838		TRP-CNSL	Park	Cancel by Client	0	1	2274
6/2/2013	11:00 AM	11:30 AM	1838		TRP-CNSL	Park	Cancel by Client	0	1	2275

Grand Total

Total Billable	Total Non Billable	Tot Mileage
0	4	

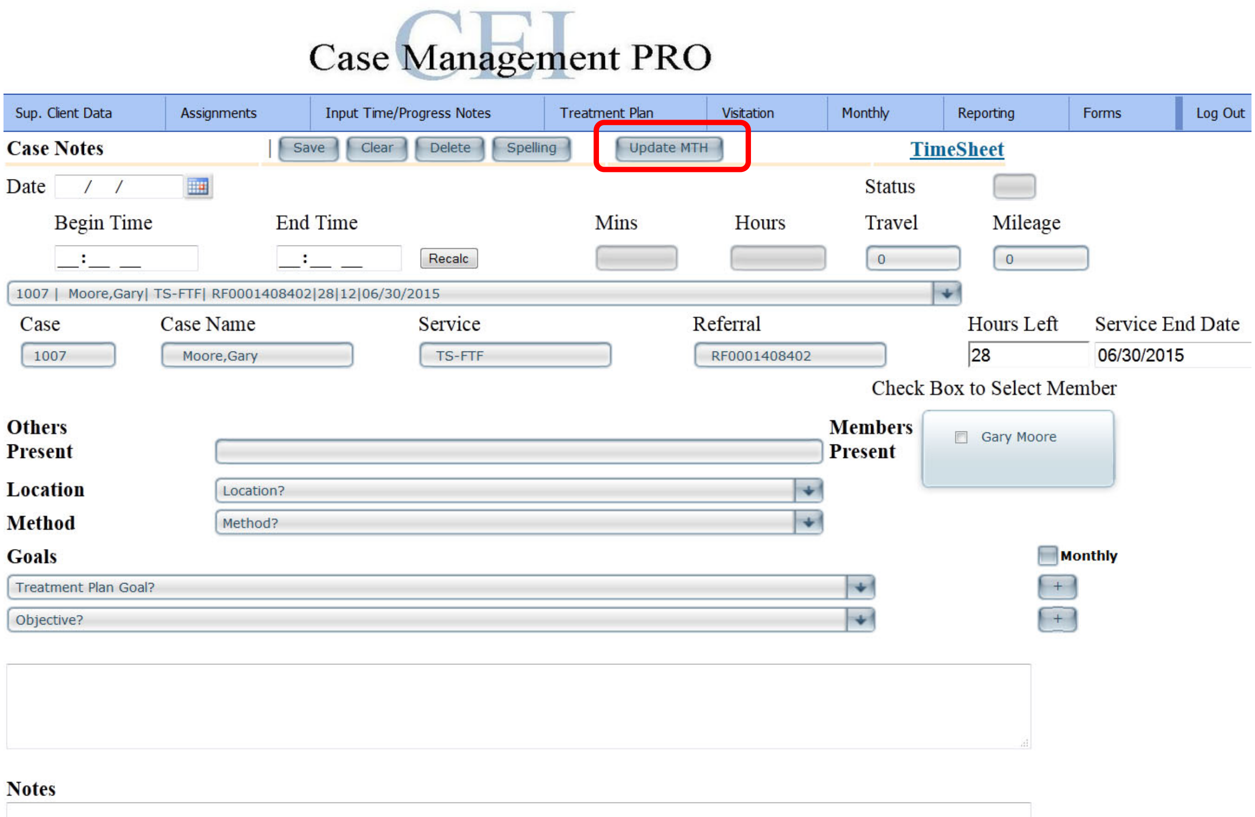


Click Save when you have made all your changes.

Update data needed for the Monthly

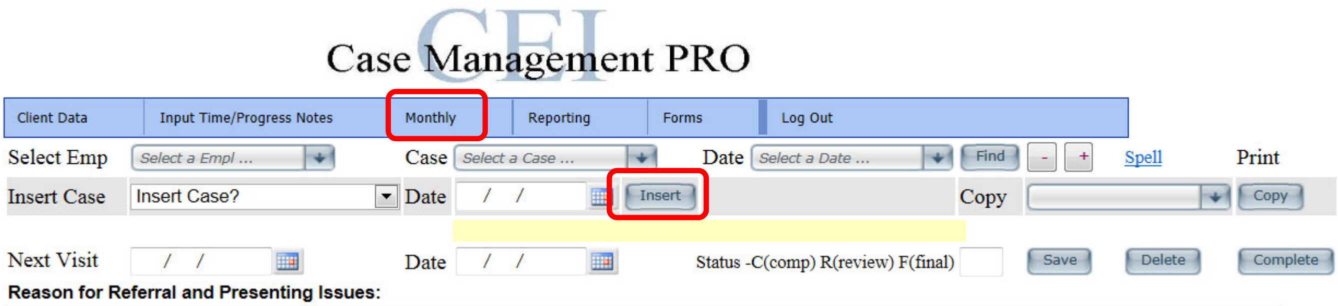
You can correct the following data after Timesheets have been completed:

1. Checkbox Monthly
2. Notes
3. Goals
4. Treatment Plan Goal.
5. Click on Update MTH



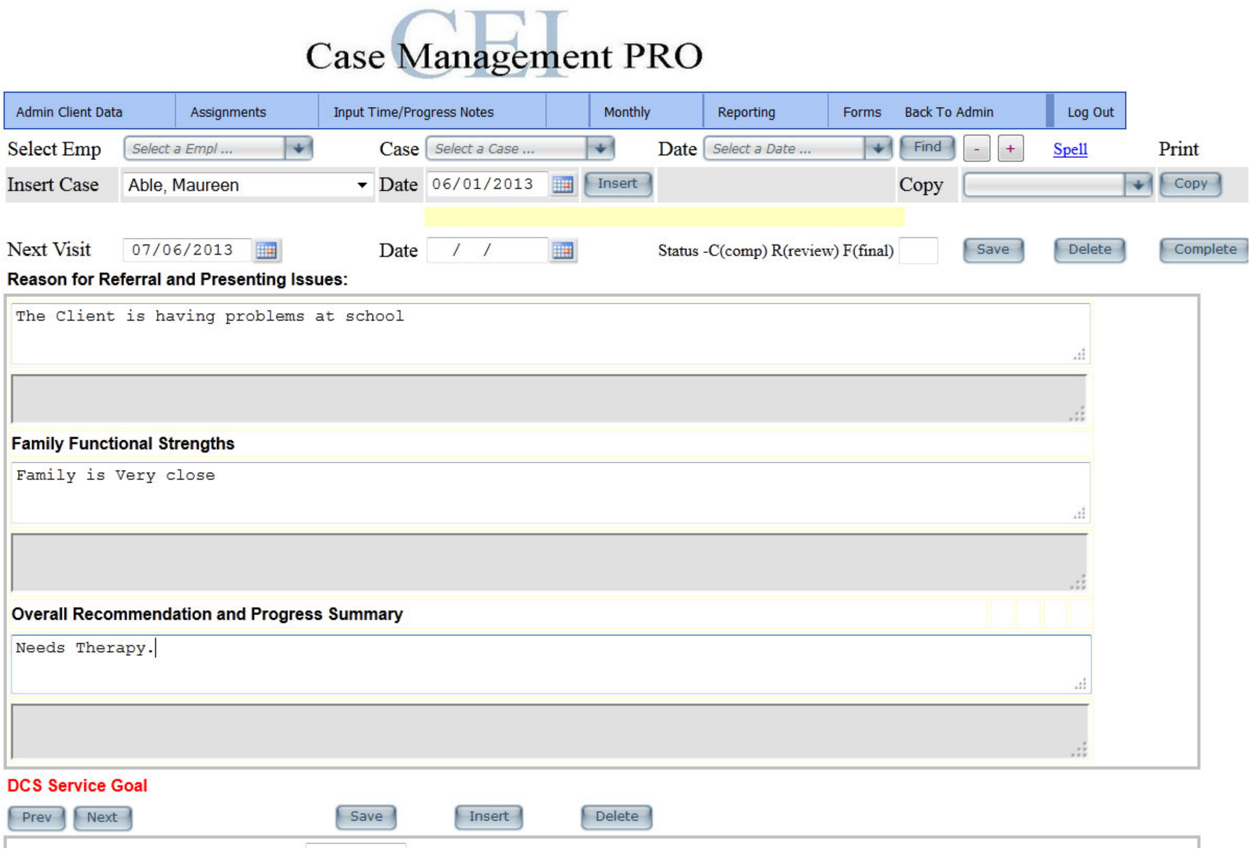
MONTHLY

Monthly Reporting



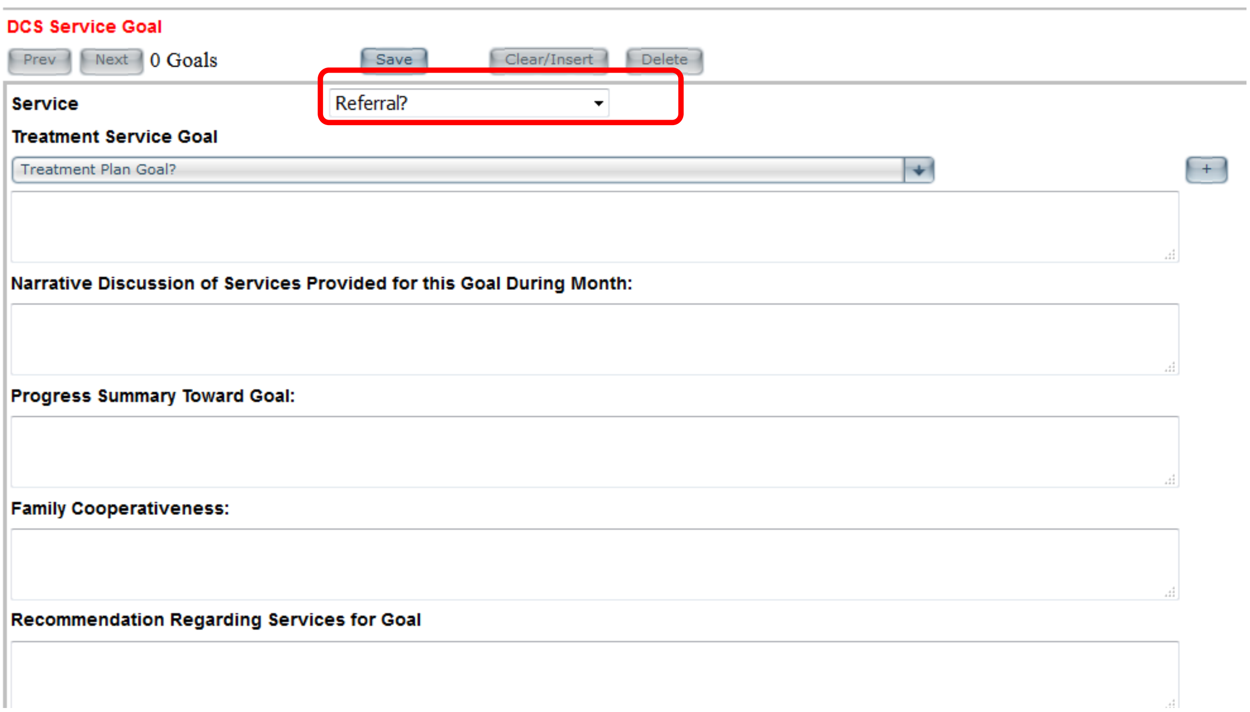
1. Click on Monthly:
    a. Choose Monthly Reporting.
    b. The Monthly reporting has two sections:
    c. The top section is for the main monthly information.
    d. The second section is for your goals. You can have multiple goals for each month.

2. When you are starting off with a new case for a new month:
    a. Choose the case from the Insert Case Drop Down
    b. Type in the date. You have the option of clicking on the calendar.
    c. Type in the date of the next visit. You have the option of clicking on the calendar.
    d. Type in the Reason for Referral and Presenting Issues.
    e. Type in Family Functional Strengths.
    f. Type in Overall Recommendation and Progress Summary.
    g. Then click on the Insert button.
    h. You should get a message that says the Monthly Report has been Inserted.


Case Management PRO
Admin Client Data
Assignments
Input Time/Progress Notes
Monthly
Reporting
Forms
Back To Admin
Log Out
Select Emp
Select a Empl ...
Case
Select a Case ...
Date
Select a Date ...
Find
-
+
Spell
Print
Insert Case
Able, Maureen
Date
06/01/2013
Insert
Copy
Copy
Next Visit
07/06/2013
Date
/ /
Status -C(comp) R(review) F(final)
Save
Delete
Complete
Reason for Referral and Presenting Issues:
The Client is having problems at school
Family Functional Strengths
Family is Very close
Overall Recommendation and Progress Summary
Needs Therapy.
DCS Service Goal
Prev
Next
Save
Insert
Delete

Adding Goals:

1. Type in the Treatment Service Goals.
2. Choose The Referral.
3. If you enter in a treatment plan you can choose the goal and click on the + To add it to the Goal text box. (this is just like the Progress Notes).. If you want your notes from you Timesheet, then this will need to be the same service / treatment plan goal that you entered on your Input Time/Progress Notes.
4. Type in the Narrative Discussion of Services provided for this goal during the month.
5. Type in Progress Summary toward Goal.
6. Type in Family Cooperativeness.
7. Type in Recommendations Regarding Services for Goal.
8. Click on Save.

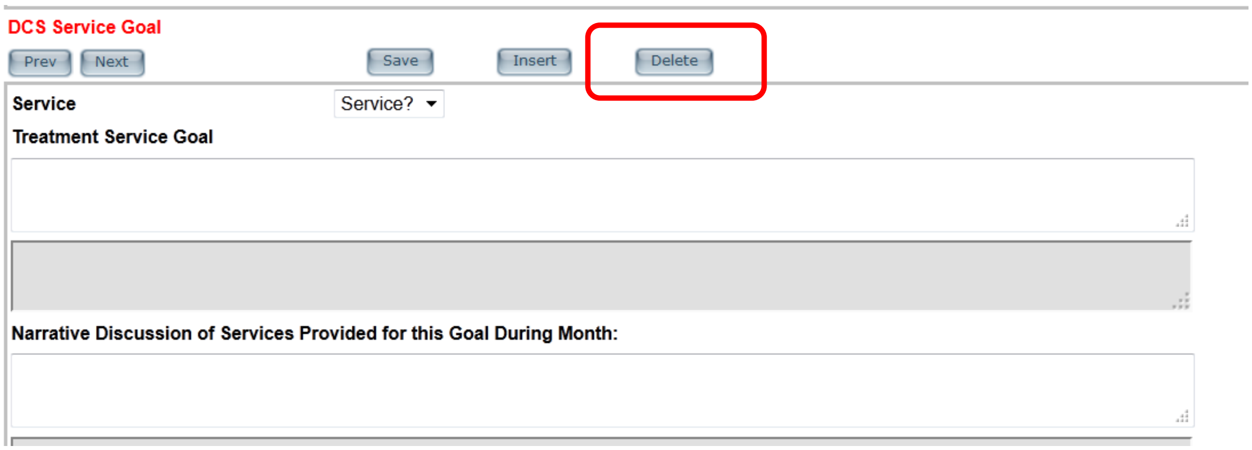


Inserting another Goal:

1. Click on Insert to Add a New Goal. This will just clear your screen to add the next goal.
2. Choose the Service from the dropdown box.
3. Type in the Treatment Service Goals.
4. Type in the Narrative Discussion of Services provided for this goal during month.
5. Type in Progress Summary toward Goal.
6. Type in Family Cooperativeness.
7. Type in Recommendations Regarding Services for Goal.
8. Click on Save.

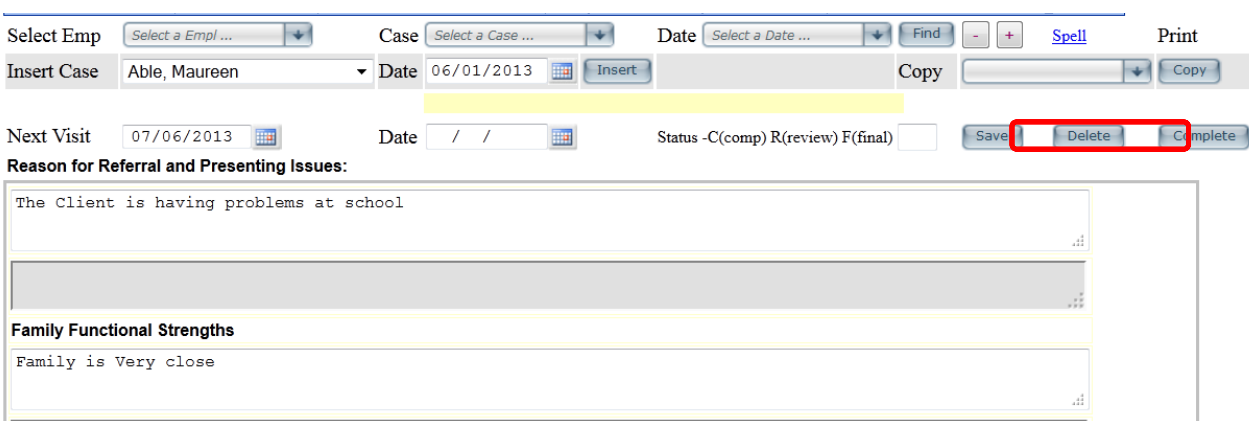
Deleting Goals:

Click on the Delete Goal button. The goal will be deleted.



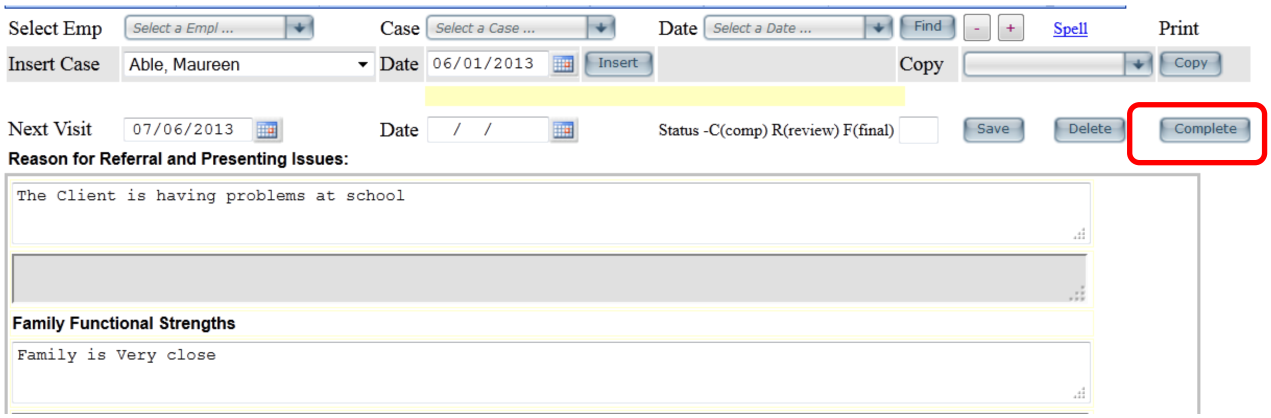
Delete Monthly Report:

Click on Delete in the top section of the form. This deletes the Monthly report and all goals.



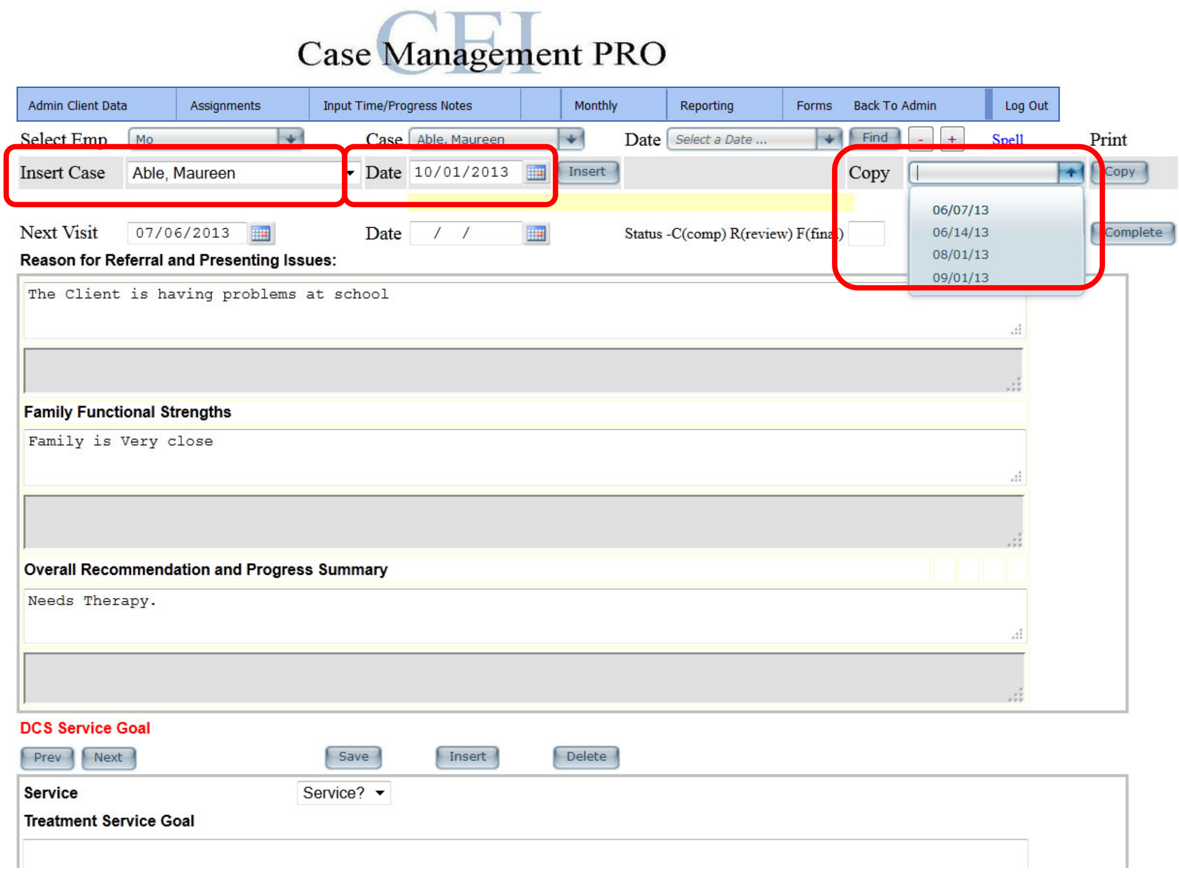
Complete Monthly Report:

Once you have added your monthly report and all your goals, you will want to click on Complete so that it will be routed to your supervisor so they can finalize it. This will change the status to a "C" when you look at it in the Monthly Detail.



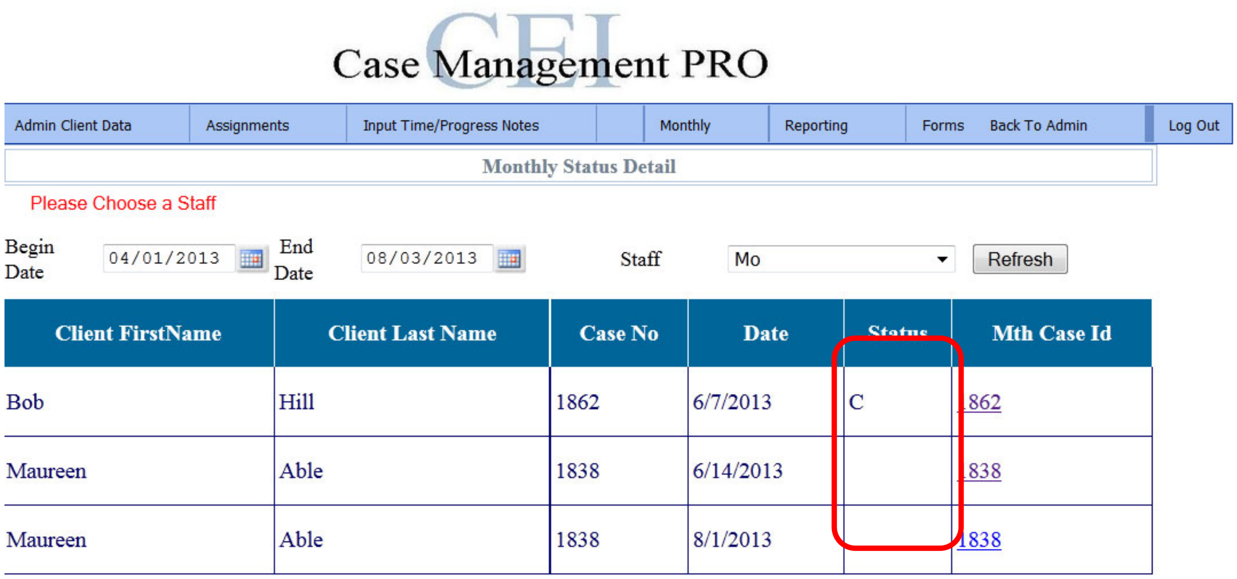
Copy a Monthly Report:

1. First select the case from the Insert Case Dropdown.
2. After you choose the case, the copy dropdown box will be populated with the previous months for that case.
3. Enter the new month in the date field.
4. Choose the month you want to copy from the Copy dropdown box.
5. Click Copy.
6. The form will be populated with that monthly's data. You will have to supply the Next Visit and make changes to any of the Text Boxes.
7. Then Click update.
8. Make sure you go to your service goals and make any changes to the goals for that month.



Monthly Detail:

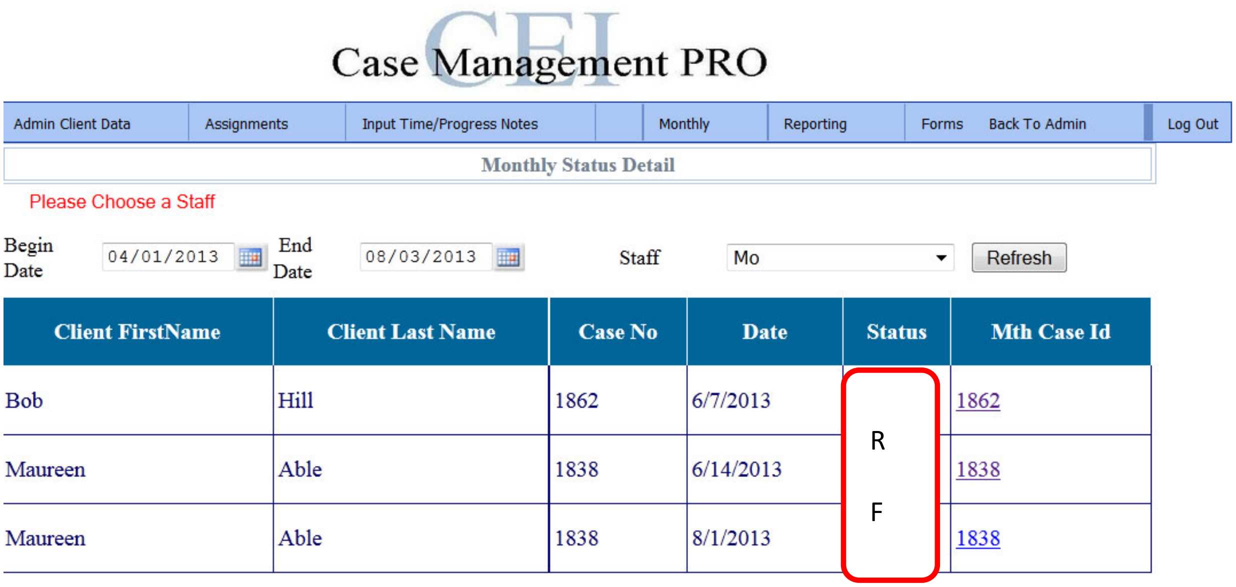
2. Click on Monthly and Choose Monthly Detail.
2. Make note of the Status:
    a. Once you mark your Monthly Report complete a “C” will appear under status.
    b. If your supervisor has rejected your report it will show an “R”.
3. Click on the case number to see the actual Monthly Report.



Client FirstName	Client Last Name	Case No	Date	Status	Mth Case Id
Bob	Hill	1862	6/7/2013	C	1862
Maureen	Able	1838	6/14/2013		1838
Maureen	Able	1838	8/1/2013		1838

Supervisor Review:

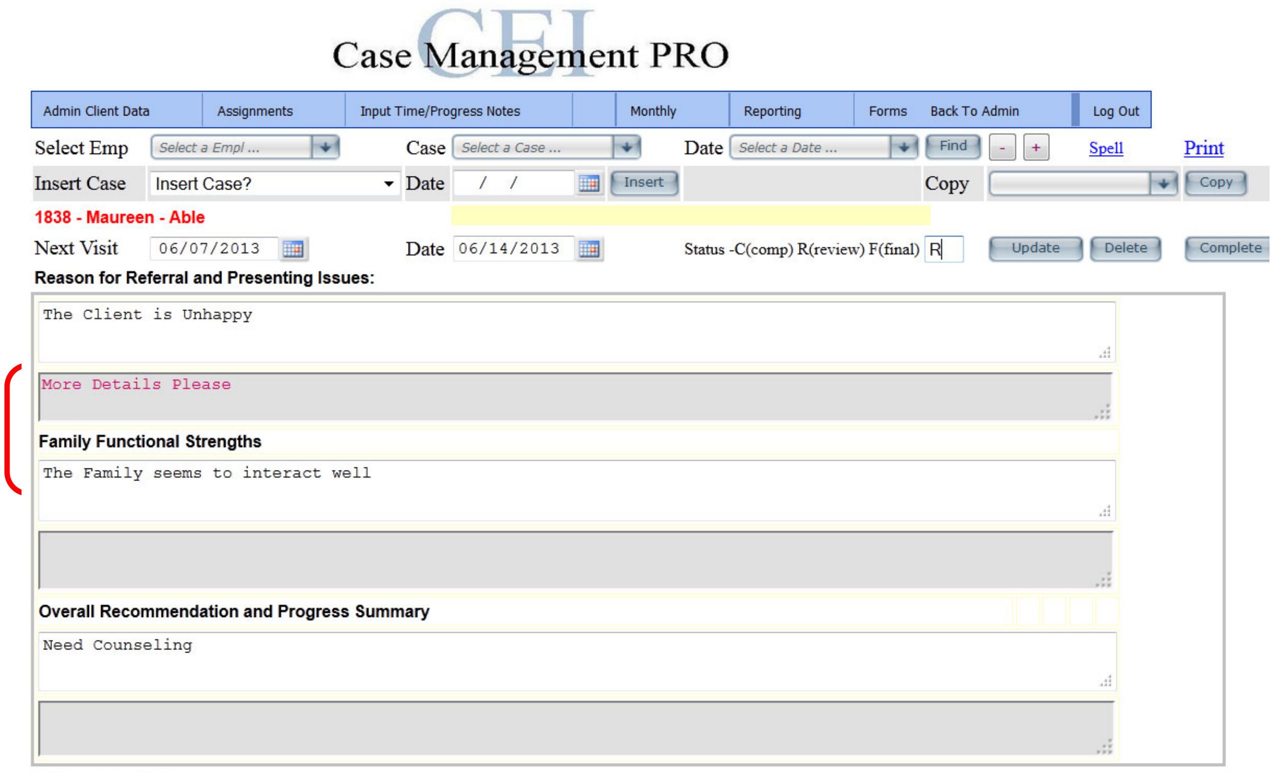
After you have marked your Monthly report complete, your supervisor will review it. They will either mark it "F" for Finalized and it will be extracted when they do the monthly reporting or they will mark it with an "R" for Review which means you need to make some changes. When a supervisor rejects your report they will make notes in the area that needs modifying.



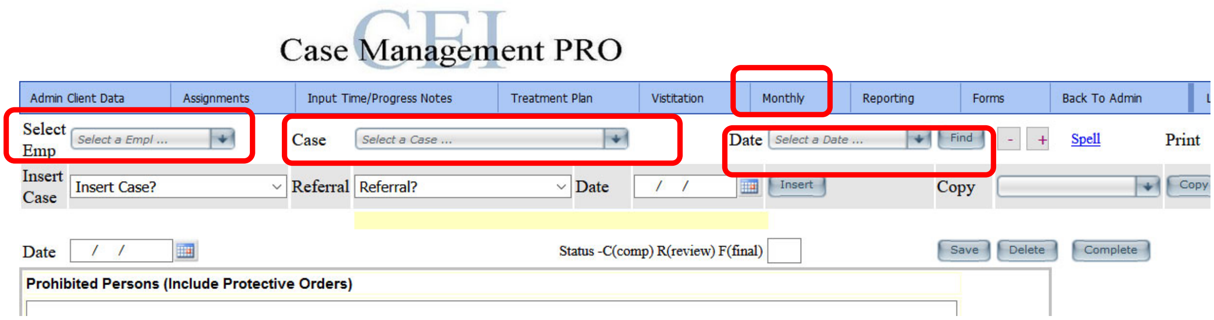
Rejected Report:

If you click on the case number of a rejected report, you will go to the actual report. If a report has been rejected, the supervisor will have made comments. The comments will show up in pink beneath your notes. You can't change the comments, but you can copy and paste them. If you don't see comments, click on the + sign to make them show.

1. Make you changes.
2. Click Update (if you skip this step, your changes will not be saved).
3. Click Complete.

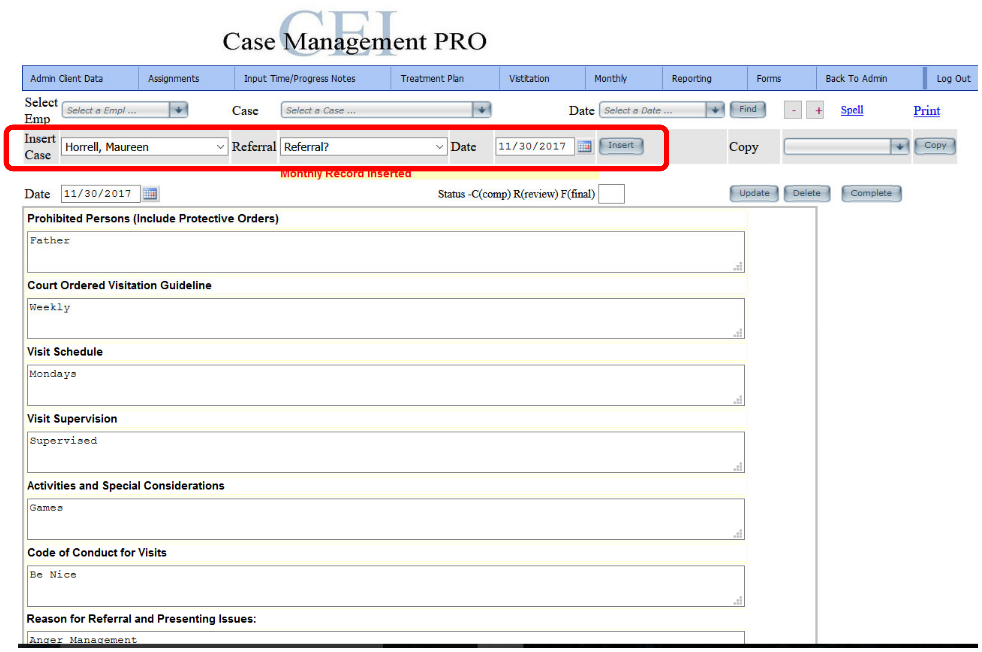


Visitation Monthly Reporting



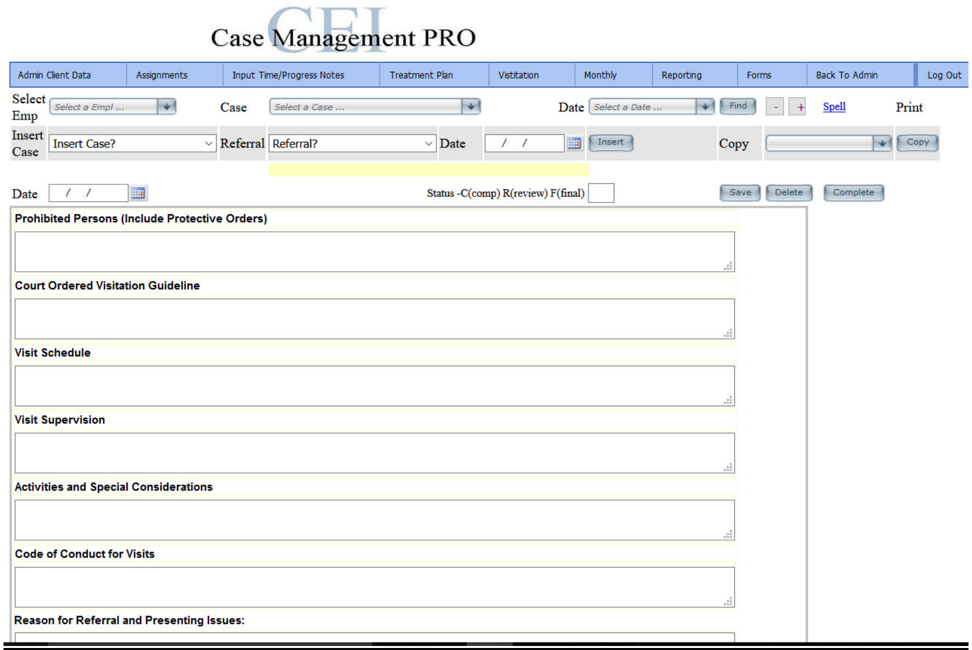
To add a new Visitation Monthly Report:

1. First you must check to see if a Visitation Monthly Report has already been entered for that Case/Referral.
    a. Select your Name from the Select Employee dropdown
    b. Select the Case /Referral from the Dropdown
    c. Select the Date. If no date is displayed for that month, you must insert a new monthly report.



3. Inserting a New Monthly Report
    a. Choose the case from the Insert Case Drop Down
    b. Choose the Referral from the Referral Drop Down
    c. Type in the date. Always use the Last Day of the Month. You have the option of clicking on the calendar.
    d. All Text boxes must be filled in
    e. Then click on the Insert button.
    f. You should get a message that says the Monthly Report has been Inserted.

Updating a monthly Report

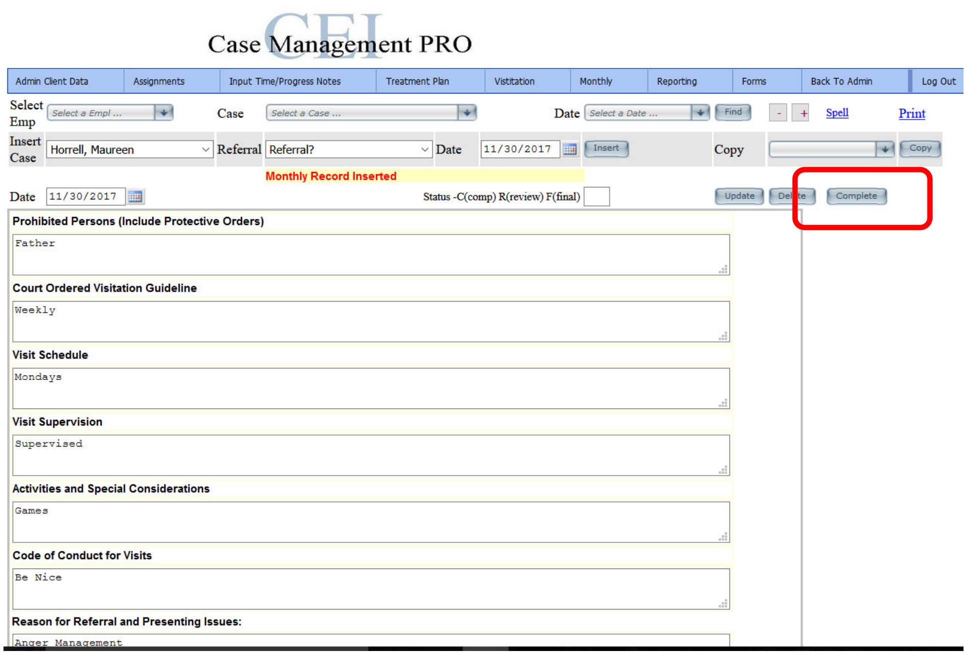


To Update a Visitation Monthly Report:

1. Select your Name from the Select Employee dropdown
2. Select the Case /Referral from the Dropdown
3. Select the Date.
4. Click on Find.
5. Your report will be display.
6. Make any changes necessary
7. Click on save.

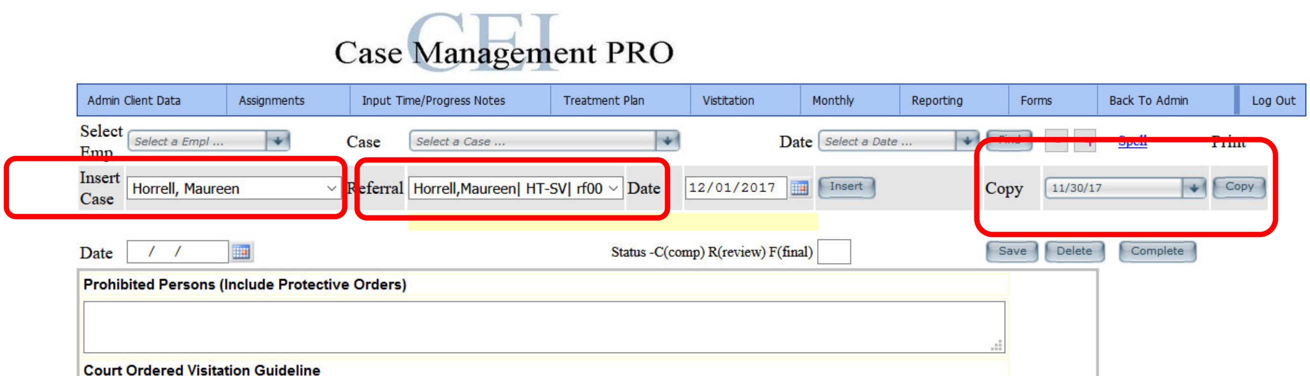
Complete Visitation Monthly Report:

Once you have added your monthly report, you will want to click on Complete so that it will be routed to your supervisor, so they can finalize it. This will change the status to a "C" when you look at it in the Monthly Detail.



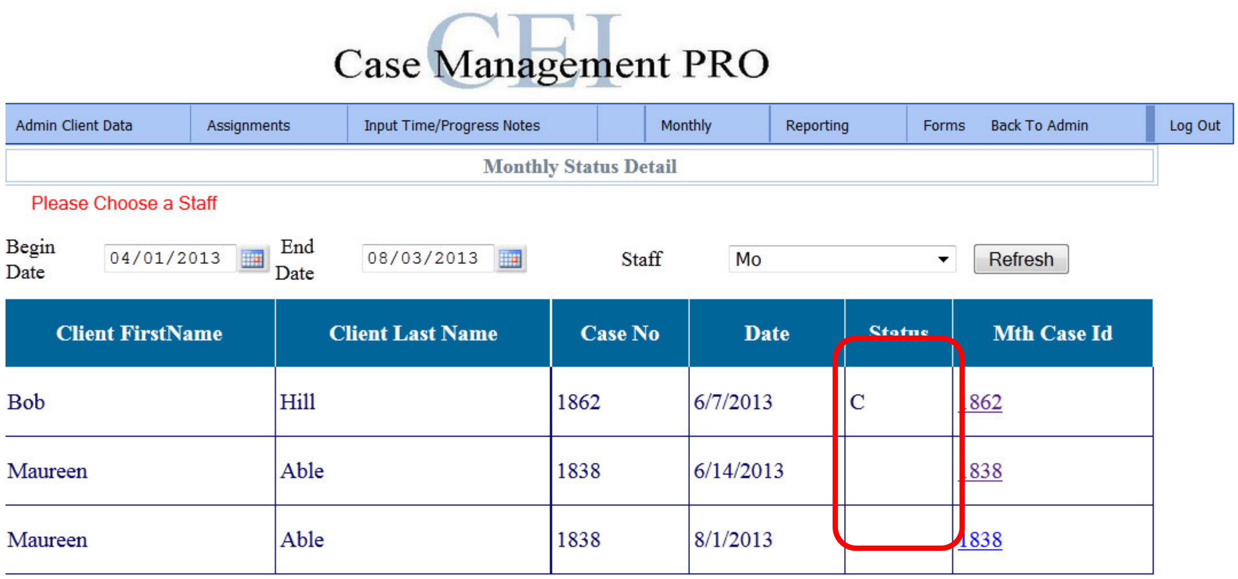
Copy a Visitation Monthly Report:

9. First select the case from the Insert Case Dropdown.
10. After you choose the case and then the Referral, the copy dropdown box will be populated with the previous months for that case.
11. Enter the new month in the date field.
12. Choose the month you want to copy from the Copy dropdown box.
13. Click Copy.
14. The form will be populated with that monthly's data.
15. Make any changes needed. The following Fields will NOT BE COPIED and will need to be filled in.
    a. Visit Schedule
    b. Visit Supervision
    c. Activities and Special Consideration
    d. Overall Recommendations.
16. Then Click update.



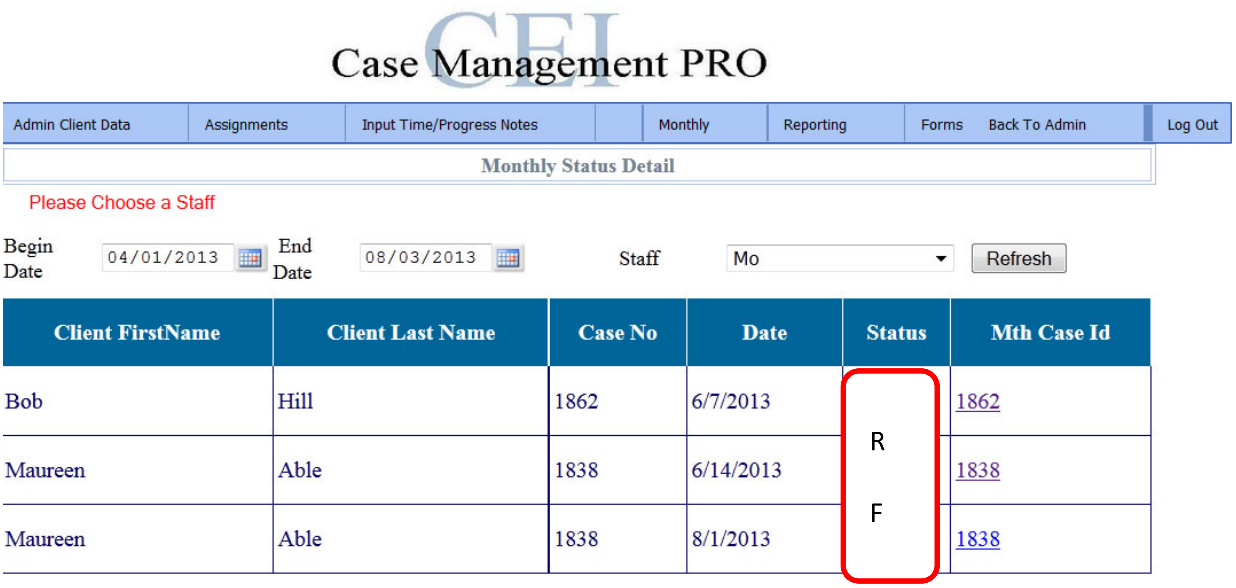
Visitation Monthly Detail:

4. Click on Monthly and Choose Visitation Monthly Detail.
5. Make note of the Status:
   a. Once you mark your Monthly Report complete a "C" will appear under status.
   b. If your supervisor has rejected your report it will show an "R".
6. Click on the case number to see the actual Monthly Report.



Supervisor Review:

After you have marked your Visitation Monthly report complete, your supervisor will review it. They will either mark it "F" for Finalized and it will be extracted when they do the monthly reporting, or they will mark it with an "R" for Review which means you need to make some changes. When a supervisor rejects your report, they will make notes in the area that needs modifying.


Case Management PRO

Admin Client Data | Assignments | Input Time/Progress Notes | Monthly | Reporting | Forms | Back To Admin | Log Out

Monthly Status Detail

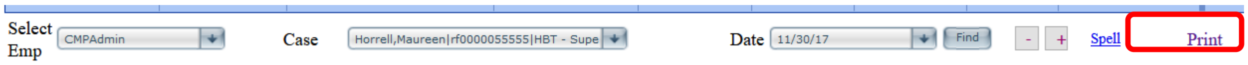
Please Choose a Staff

Begin Date 04/01/2013 End Date 08/03/2013 Staff Mo Refresh

Client FirstName	Client Last Name	Case No	Date	Status	Mth Case Id
Bob	Hill	1862	6/7/2013		1862
Maureen	Able	1838	6/14/2013	R	1838
Maureen	Able	1838	8/1/2013	F	1838

Monthly Reporting:

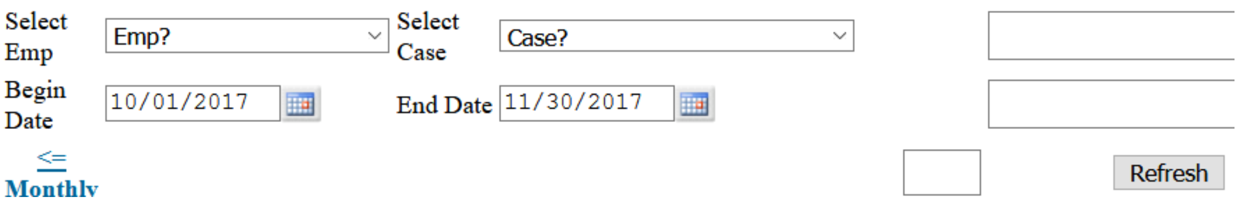
1. To Print your Report, you can do it by:
   a. Clicking on the hyperlink



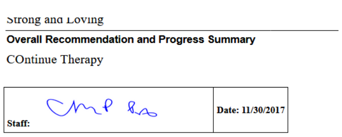
Or

b. Click on Reporting Menu. Visitation Monthly Reporting

a) Select Your Name
b) Select the Case
c) Click Refresh.



2. If the Report Has Been Finalized (F). You can then export the report.
3. MAKE SURE YOU CHECK THAT YOUR SIGNATURE IS DISPLAYED! IF YOU DO NOT SEE IT GO TO EMPLOYEE SIGNATURE AND RESIGN. You should get an error message stating that your Signature is not found.



4. If you are exporting your Monthlies, Click on Export. A new Screen Form will appear with no buttons. This is the Report that will be exported to the server (Do not worry if the logo does not appear) .
5. *** If this is a DCS monthly report the report will be transmitted via the API to Kidstrack. The Status will now be T For Transmitted.
6. Use the Back button on the browser to return to the monthly reporting form.

Date

<= Monthly

Rpt Not Complete -

Refresh Print Export

Your Company Name
123 Main
Your Town IN 44444

Monthly Report-Visitation

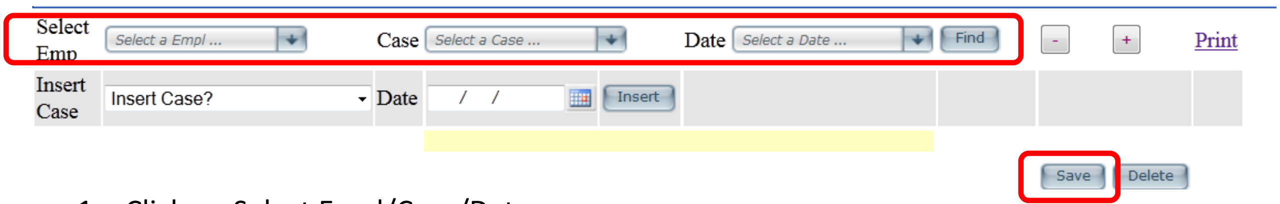
November 2017

Case # 531
Client Maureen Horrell
County Brown

Referral Number:	rf0000055555
Service Provided:	HBT - Supervised Visit
Referred Parent(s):	Maureen Horrell
Referred Child(ren):	Diana Horrell
Prohibited Persons(Include Protective Orders):	Father
Begin/End Date of Referral:	01/01/2015-01/01/2018
Referral Agency:	County DCS
Case Mgr/ PO Name:	Amy Baxley
Service Provider Staff:	CMPAdmin
No of Service Unit Authorized:	55
No of Service Units Delivered:	2
Court Ordered Visitation Guideline:	Weekly
Visit Schedule:	Mondays
Visit Supervision:	Supervised
Activities and Special Considerations:	Games
Code Of Conduct for Visits:	Be Nice

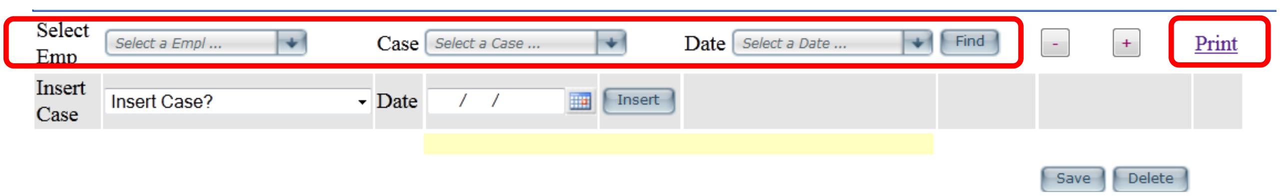
Contact Date	Start Time	End Time	Duration	Method	Location	Those Present	Staff
11/10/2017	10:00AM	11:00AM	1	Supervised Visit	Agency/Other Professional	Maureen Horrell	CMPAdmin

Visitation Reporting – Review/Updating a Report



1. Click on Select Empl/Case/Date:
2. Click on the find button.
3. Your visit will then be displayed.
4. If needed make your changes and then click the save Button

Visitation Reporting – Printing Report

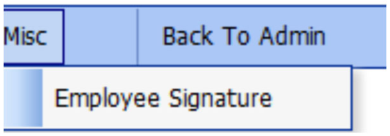


1. Click on Select Empl/Case/Date:
2. Click on the find button.
3. Your visit will then be displayed.
4. Click on the Print Button.
5. The new Visit report will be displayed. Click the print button and you will be able to create a PDF via CutePDF.

6. If you are exporting your Monthlies, Click on Export. A new Screen Form will appear with no buttons. This is the Report that will be exported to the server (Do not worry if the logo does not appear)
7. *** If this is a DCS monthly report the report will be transmitted via the API to Kidstrack. The Status will now be T For Transmitted.
8. Use the Back button on the browser to return to the monthly reporting form.

Employee Signatures

1. Click on Misc / Employee Signature



The Following form will be displayed.

Use your mouse or stylus on your tablet to sign in the box.
You should see your signature in the current signature field.

REPORTS

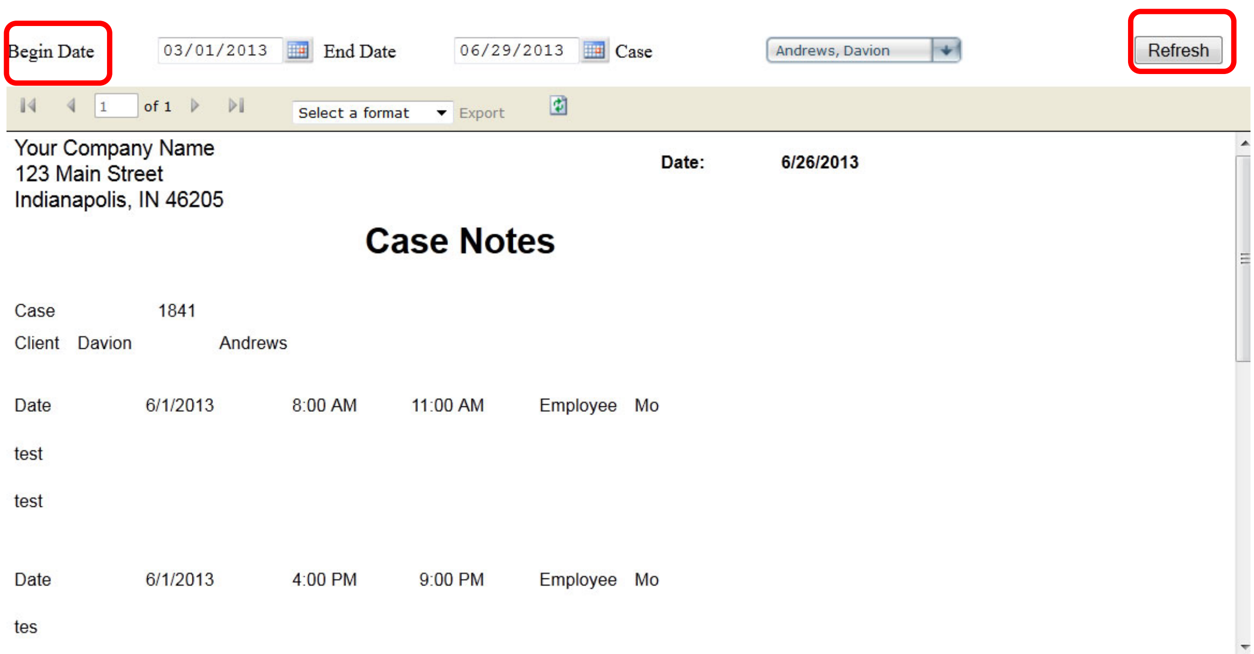
Progress Notes:

When you are ready to print or view Progress Notes, click on Reports and then choose Progress Notes.

Filters:

1. Begin Date
2. End Date
3. Case

Click on Refresh to refresh your report filters.



To Create the pdf:

1. On the dropdown to select the format choose PDF.
2. Click on export. The Case Notes Report will now be displayed in your PDF viewer. Save the file or choose Share – Email.

Timesheet:

When you are ready to print or save a .pdf copy of your Timesheet, click on Reports and then choose Timesheet.

Sample Timesheet

Back to Previous Page

Name : Mo

Begin Date 04/01/2013

End Date 06/12/2013

Refresh

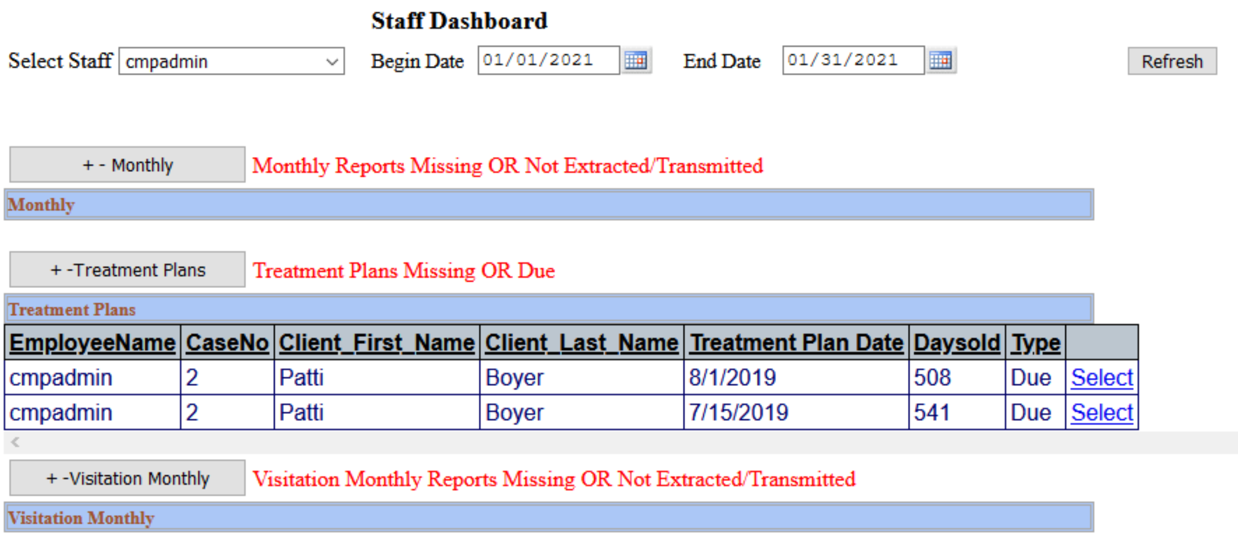
Date	Begin Time	End Time	CaseNo	Case Name	Service	loc	Method	Bill Hours	Non Bill Hours	Detail
6/1/2013	11:00 AM	11:30 AM	1838	Barrios, Maria	TRP-CNSL	Park	Cancel by Client	0	1	2272
6/1/2013	11:00 AM	11:30 AM	1838	Barrios, Maria	TRP-CNSL	Park	Cancel by Client	0	1	2273
6/1/2013	11:00 AM	11:30 AM	1838	Barrios, Maria	TRP-CNSL	Park	Cancel by Client	0	1	2274
6/2/2013	11:00 AM	11:30 AM	1838	Barrios, Maria	TRP-CNSL	Park	Cancel by Client	0	1	2275

Grand Total

Total Billable	Total Non Billable	Tot Mileage
0	4	

1. If you need to make any correction, you can click on the detail number and that will take you back to the input/progress notes form to make your corrections.

The Dashboard is found under the MISC tab on the employee menu. Choose the staff, begin date, and end date and click on the REFRESH button.
The +- will expand and collapse the sections.
The far-right column will have a link to the reports or specific web form.



EmployeeName	CaseNo	Client_First_Name	Client_Last_Name	Treatment Plan Date	Daysold	Type	
cmpadmin	2	Patti	Boyer	8/1/2019	508	Due	Select
cmpadmin	2	Patti	Boyer	7/15/2019	541	Due	Select

INDEX