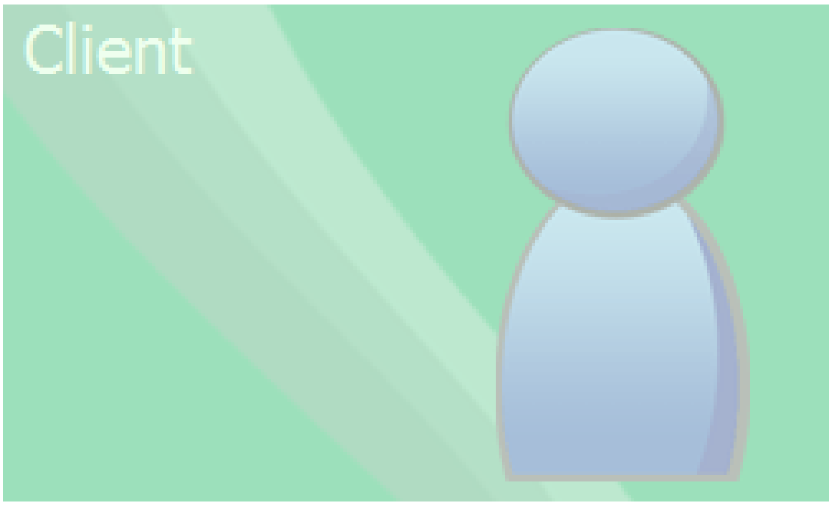
Hanlon Client Training Manual

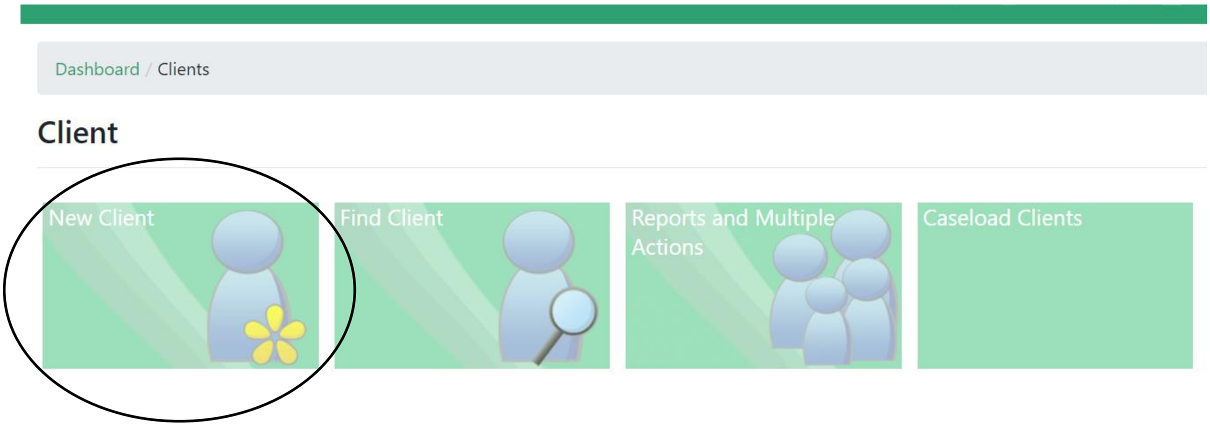


Contents

Chapter 1: Registering a Client

To begin registering a client you will need to click on ‘Client’ from the list of modules on the left-hand side of the system.

You will be presented with the following screen known as the ‘Client Menu’:



On this page, you can register a new client, find existing clients, report on clients, and view your own caseload of clients.

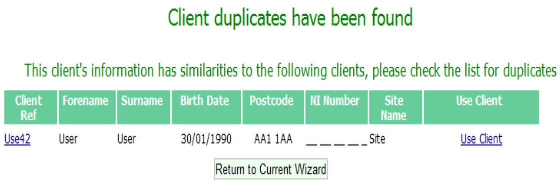
Click on ‘New Client’ to register a new client into the system. This will take you to either the designated registration form or to a list of forms you can use.

The registration wizards should be selected based on which is most relevant to the clients’ programmes/project. Each registration wizard is similar in nature however some vary questions. Such as presenting issues, programmes, or job roles.

1.1 Checking for Duplicates

Before completing the registration form a <u>Duplicate Check</u> needs to be performed on specific criteria.

The duplicate check button can be found at the bottom of the registration form. It will require either the forename, surname and gender or national insurance number to check for a possible duplicate.



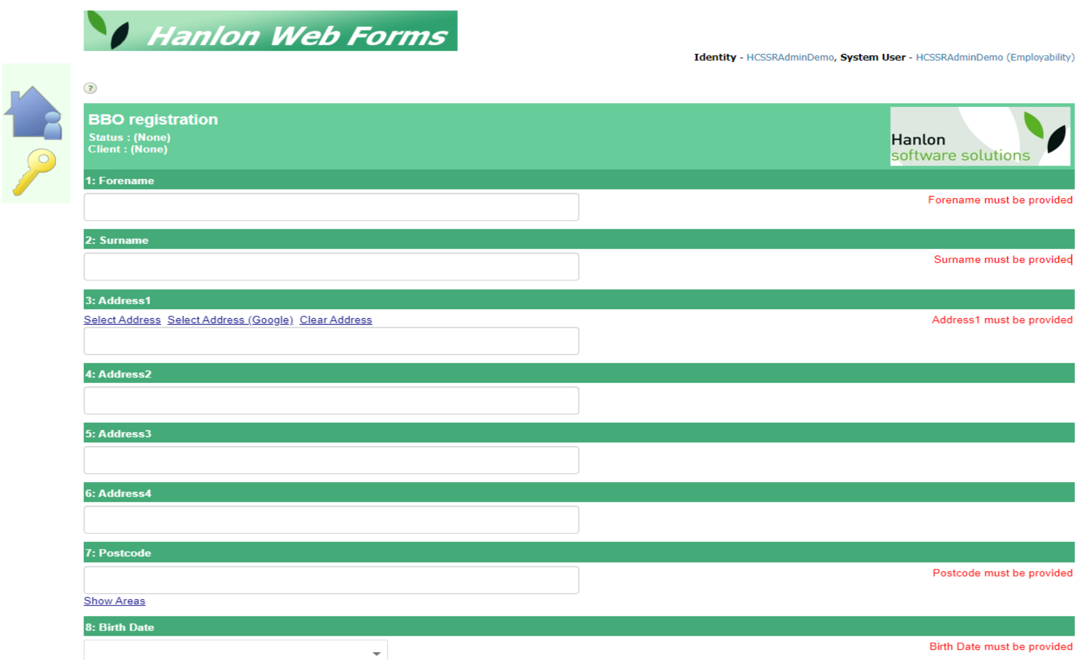
Once the information is entered, click the duplicate check button to see if any matches appear.
If nothing appears then there are no duplicates in the system so you can carry on filling out the form.

If there are possible duplicates in the system, they will appear on the page as shown above. You will have the option to view the client by clicking the link from the reference and give you the option to contact the caseload if your permissions do not have access to the client.

If it is a duplicate, select the 'use client' option and this will send you into the client record and skip the registration process. If it is not a duplicate, carry on filling out the form as normal.

1.2 Registration Wizard (Client Registration Form)

If no duplicates are found, please continue to fill in the registration form, completing all fields that are **mandatory** as the form will not save unless completed. A red message will appear to the right-hand side of questions that are mandatory or only require one option to be selected.



House icon - Return button to the client menu

Key icon - Log out button

Mandatory fields

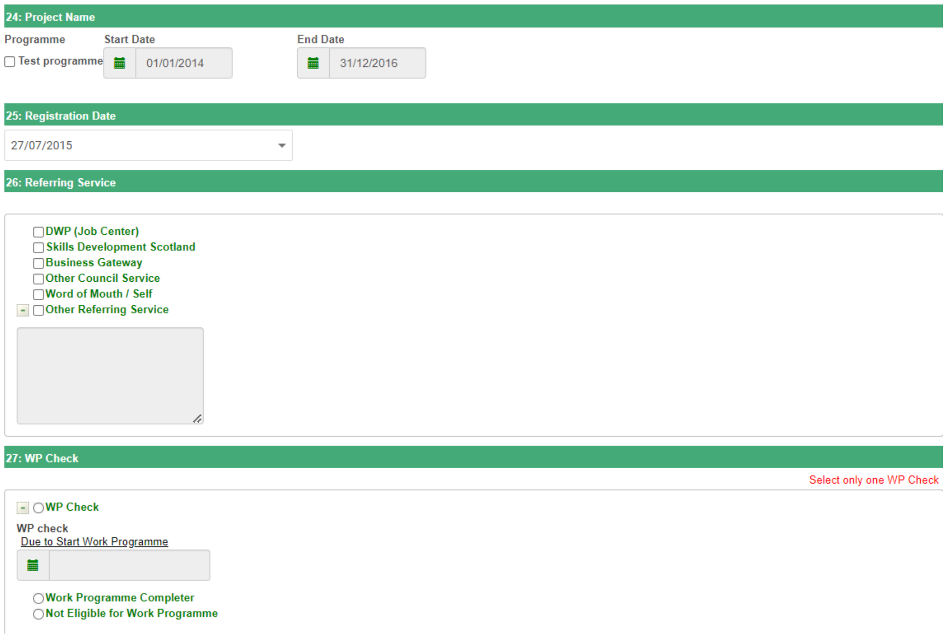
Select address searches for postcodes in the system.

Select address google checks via google maps

Show areas will display the location of postcode

If any are missed when attempting to save, a pop up will appear to ensure they are filled in.

Each registration wizard is customisable for each organisation to ensure that you capture the relevant information from your clients. Below is an example of some of the questions that can arise on a registration form.



Many of the registration forms will contain free text boxes and tick boxes but there are some types of questions that can be very important to the client record.

Programmes allow you to attach the client to a funding stream through the registration form. An example of this question is in question 24 show above. To add a client to a programme, it just needs to be ticked. You can choose to alter the start and end date the client will be on the programme through the date pickers, but the date must fall between the original dates. Several programmes can be listed on the form and clients can still be added to programmes even after the registration process.

Profile items are the second key question on the registration forms. These form the basis of the reporting but also a good way to group clients together. Mostly commonly, they can be used for questions such as if a client is on a certain benefit, barrier, disability, housing status, employment status etc. They can be either set up as a tick box like shown above or we can add further information onto them as well. This can range from text boxes, yes or no options, further options, dates, scaling bars and numbers. These are key to reporting and the client records so it is always advised to fill in as many as you can at registration.

Data protection notes are the final key area of the form. They must be accepted to save the form. If you have not pressed ‘accept’, a pop up will emerge to remind you. A registration form cannot be saved if the data protection question has not been answered to ‘yes’.

1.3 Saving a registration form

To save a registration form, you will be provided with four options at the bottom of the form.

You can ‘Save Wizard Only’ (this will save information inputted which can be updated at a later stage – useful if you are missing some Mandatory fields). This option will not create a client record

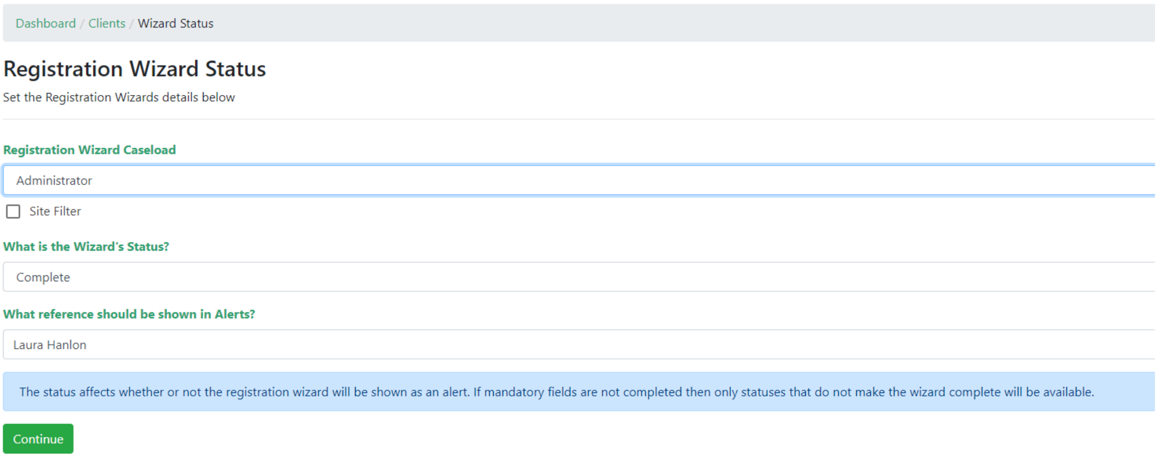
You can ‘Save/Update Client and Wizard’. This will save the data and take you to a further screen (detailed below). This option will also run a Duplicate Check. This is seen as the full and complete save.

You can ‘Save Partial Registration’, this works the same as the ‘save wizard only’ and should be used as a half save if you are missing mandatory options. The difference between the two, is this option will create a client record even if the form is incomplete.

You can ‘Exit without Save’. This will lose all the information you have input and return you to the Client Screen.

1.4 Save/Update Client and Wizard

If you have selected the ‘Save/Update Client and Wizard’ the following screen will be displayed:



You will need to complete this page in order for the registration form to save. In the caseload section, this should say who completed the registration form. If the ‘site filter’ is ticked, this means it is just looking at caseloads under your site. Unticking this will bring every caseload on the system.

The wizard status determines whether the form has been fully completed or not. As this is the full save, it will default to complete.

If the status was set to incomplete, you are given the option to change the name that will display in the alerts. More information on this will be available in section 1.5.

Once you have filled in this page, press the continue button. This will save the form and the client record will now be available under the ‘find client’ option.

From here you can choose to:

- Add another client – this will take you to a fresh Registration Wizard
- Back to the client menu – This will return you to the Client Menu
- View client summary – This will take you into the newly created Client Record

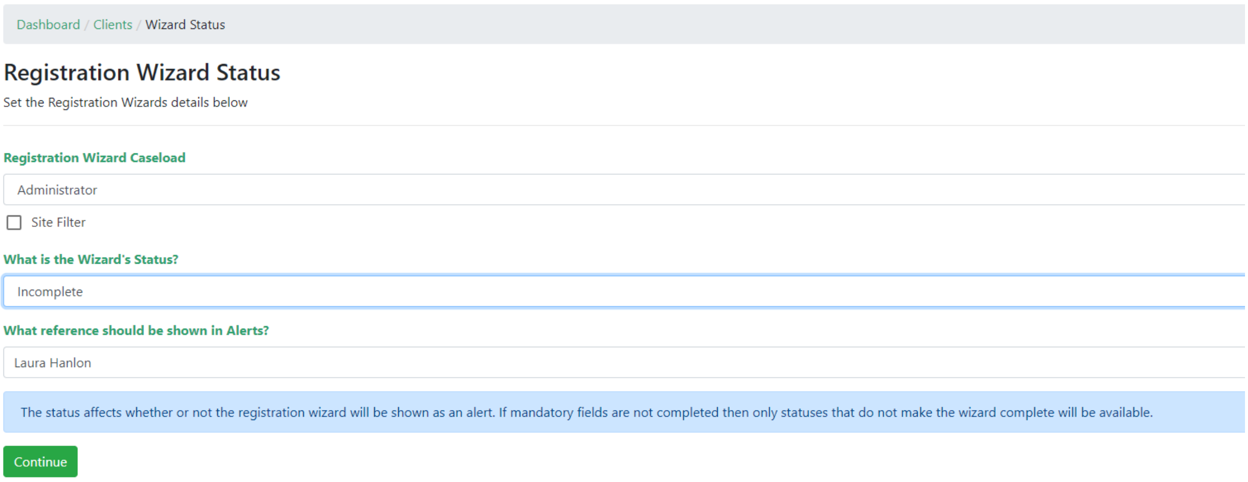
1.5 Save Wizard Only and Save Partial Registration

Both save wizard only and save partial registration work exactly the same. The only difference between them is the save wizard only will not create a client record, whereas the save partial will.

Save wizard only is useful in a scenario where you are given minimal information about the client for the form or prefer to only keep completed client records within the find client section.

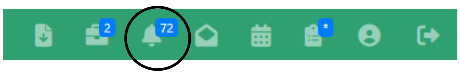
Save partial registration is useful if the client has given most of the mandatory options and is likely to return shortly with the remaining information. It can also be useful if you need to continue to add to the client record while waiting for the client to return with the remaining information.

If you choose 'Save Wizard Only' or 'Save Partial Registration, you will be taken to the same page that was mentioned in section 1.4.



Firstly, add in the caseload of the person who completed form in the 'registration wizard caseload' section.
Under the 'wizard status' field, ensure this is set to incomplete as the form requires further information.
You can also edit the 'reference' that will appear in the alerts, otherwise it will default from the forename and surname that was added on the form.

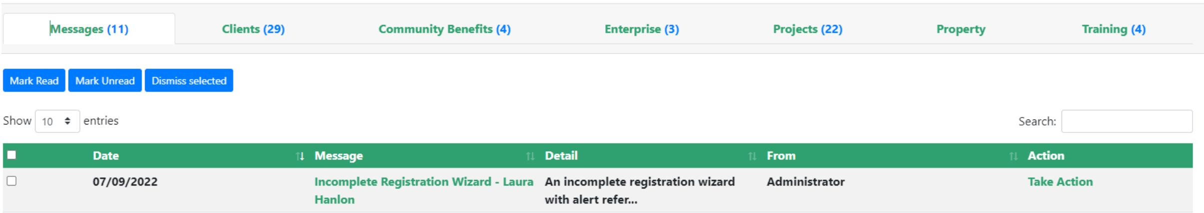
For both the partial and save wizard only saves, if the form is not complete and requires the user to return with more information, always ensure the status is set to 'incomplete'.
Press the 'continue' button when finished and the registration form will save.



If you did the save partial registration, you will now find the client record within the 'find client' section of the system and an alert has been created. If you chose save wizard only, no record will be created but an alert will.
Once the client has returned with the information to continue filling out the form, you will now need to go into the alerts. This can be found in the top right-hand corner of the system under the bell icon.

On the alerts page, if you are an admin you may need to select the caseload from the drop down who completed the form. If on normal basic user permissions, your name will already default.

Under the messages section, you will see a list of alerts. You can either scroll down through the pages or use the search bar to the right-hand side to find the alert. You will need to search for the name of the client/reference you entered when saving.



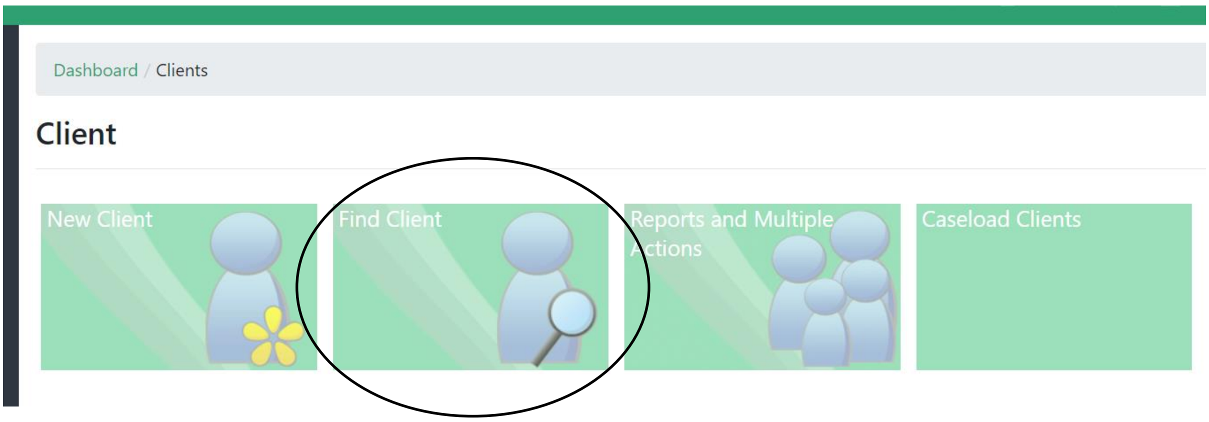
Press the ‘take action’ button and this will bring you back into the registration form to continue filling in the information.

If the client has still not given enough information, repeat the process again by selecting the ‘save wizard only’ or ‘save partial registration’ and ensuring the status is set to incomplete. If you are now happy you have all the information, use the ‘save/update client and wizard and set the status as complete. This will fully register the client.

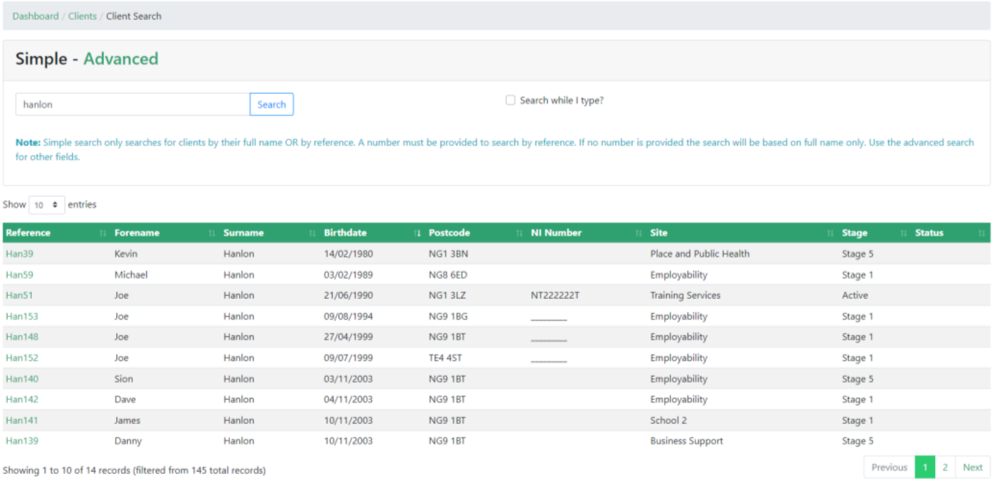
Chapter 2: Finding a Client

2.1 Client Search

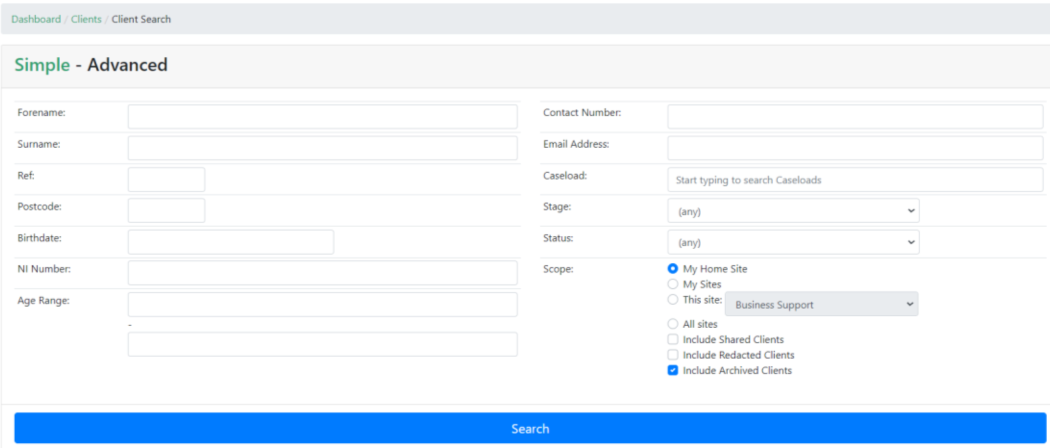
On the Client Menu screen click on ‘Find Client’



To use the simple search, begin typing the name in of the client and the following will appear.



For an advanced search, press the 'advanced' button.



This will allow you to search for clients based on various other areas. The advanced search allows you to also search for postcode, national insurance number, by age range, scope/site, caseload, stage and status just by filling in the fields and pressing the search button.

The scope section of the advanced the advanced allows the user to search on different sites of the system. 'My Home Site' searches through clients that belong to your home site, 'Just my site(s)' searches through all the sites the user has access to, 'this site' will search through the site that is selected in the drop down and 'all sites' will search through all sites on the system.

The number of results viewable on each page of the search results is changeable by using the show entries drop down. Users can select from the options 10, 25, 50 and 100.

Once you have found the client you wish to view you can access their record by clicking on their client ref. This will take you straight to the client record on the client summary page.

2.2 Accessing client records/ Denied to Client/Referral Requests

When searching for a client using the 'Search' facility, typing in a client name will display all clients matching the search term. The results that come back may differ depending on the users' permissions. If the user can access all clients, then it will show as below. Selecting the reference will take you into the client record.

Dashboard / Clients / Client Search

Simple - Advanced

Enter a search term and press 'Search' | Search | Search while I type?

Note: Simple search only searches for clients by their full name OR by reference. A number must be provided to search by reference. If no number is provided the search will be based on full name only. Use the advanced search for other fields.

Show 10 entries

Reference	Forename	Surname	Birthdate	Postcode	NI Number	Site	Stage	Status
Rei135	Duncan	Reid	30/03/1940	PA1 1TU		Employability	Stage 1	
Rob13	Harry	Robinson	11/04/1940	NG2 9BG	GW48832W	Place and Public Health	Stage 1	
Joh20	Margaret	Johnson	09/07/1940	DE6 5DE	RH58385H	Place and Public Health	Active	
Fen119	Clarissa	Fentiman	22/10/1946	FY2 7PG	XX546732X	Mental Health Trailblazer	Stage 1	
Ber23	Sylvia	Berisford	08/06/1950	g1 1bl	YH87787	Place and Public Health	Stage 5	
Osc15	Phoebe	Oscroft	05/07/1950	NG2 6GD	UG79978Y	School 1	Active	

If you are using an account that restricts you from certain clients (often basic users) you will see the following:

Simple - Advanced

Enter a search term and press 'Search' | Search | Search while I type?

Note: Simple search only searches for clients by their full name OR by reference. A number must be provided to search by reference. If no number is provided the search will be based on full name only. Use the advanced search for other fields.

Show 10 entries

Reference	Forename	Surname	Birthdate	Postcode	NI Number	Site	Stage	Status
Rei135	Duncan	Reid	30/03/1940	PA1 1TU		Employability	Stage 1	
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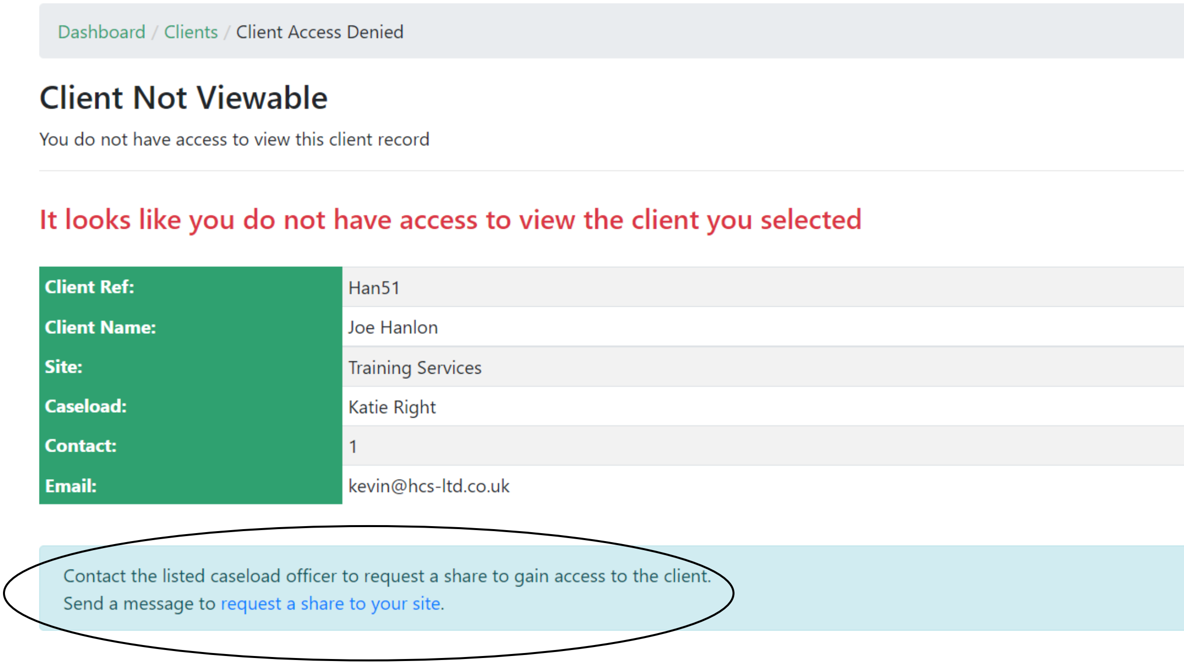
Joh20	Margaret	Johnson				Place and Public Health	Active	
Fen119	Clarissa	Fentiman				Mental Health Trailblazer	Stage 1	
Ber23	Sylvia	Berisford				Place and Public Health	Stage 5	
Osc15	Phoebe	Oscroft				School 1	Active	
Woo12	Dominic	Wood				Place and Public Health	Stage 5	
ggg50	Greg	Halford	08/10/1950	NG8 1HU		Place and Public Health	Stage 1	
Sim24	Cliff	Simpson				Place and Public Health	Active	

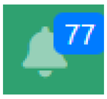
The fields in orange with the red warning sign meaning you do not have the permissions to access this account. This is because the client is on a different site to the account you are using. When one of these clients is selected (by the reference), if it is not accessible by your profile, the following screen will be displayed, detailing the caseload, request to share or refer the client.



Selecting this option will send a message over to the caseload of the client who can then approve or reject the request to give the user access to this individual client.

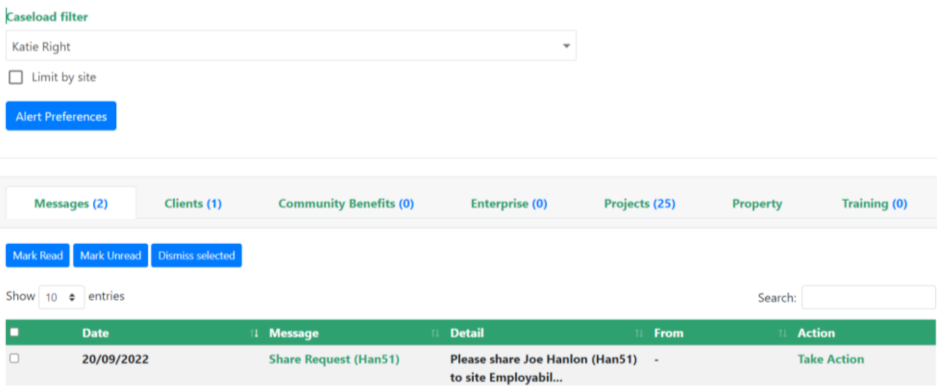
Once selected, the following screen is shown, with default text to be sent to the caseload worker. This can be added to notify them of the reason for the share request.

Once sent the caseload will be notified and can share the client over to your site via the alerts.

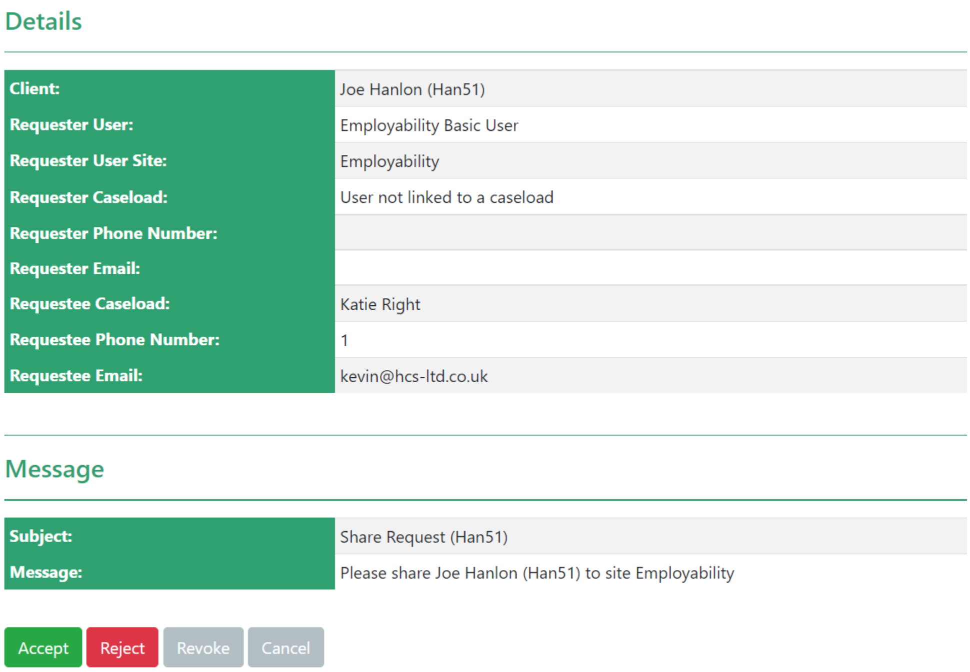


Once the caseload worker who the request has been sent to next logs into the system, a notification will be showing on the alerts icon (the top right-hand corner).

Once clicked, this will open the user's Alert screen, where the share request will be shown at the top of the page under the messages tab.

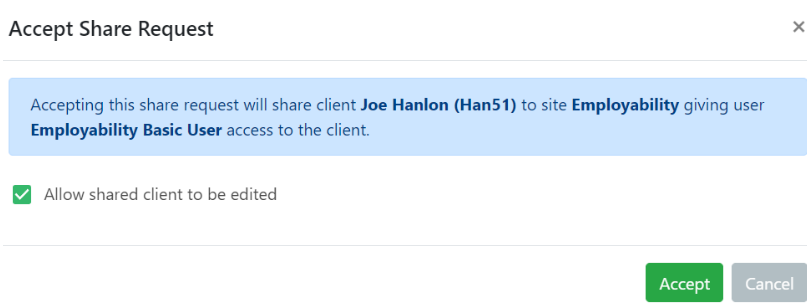


Select the 'take action' button. You will then be directed to confirm or reject the share request. If you reject the share request the client will not be shared across to the requestees site.



If you press the accept button the following message will appear:

If the 'allow shared client to be edited' is ticked, this means the site that the client is being shared to will now be able also edit the client record. If you untick this option, it will become a read only client record.



Once accepted, the user who requested access to this client record will now be able to access it.

Chapter 3: Client record

To access a client record, select the reference from the find client page.

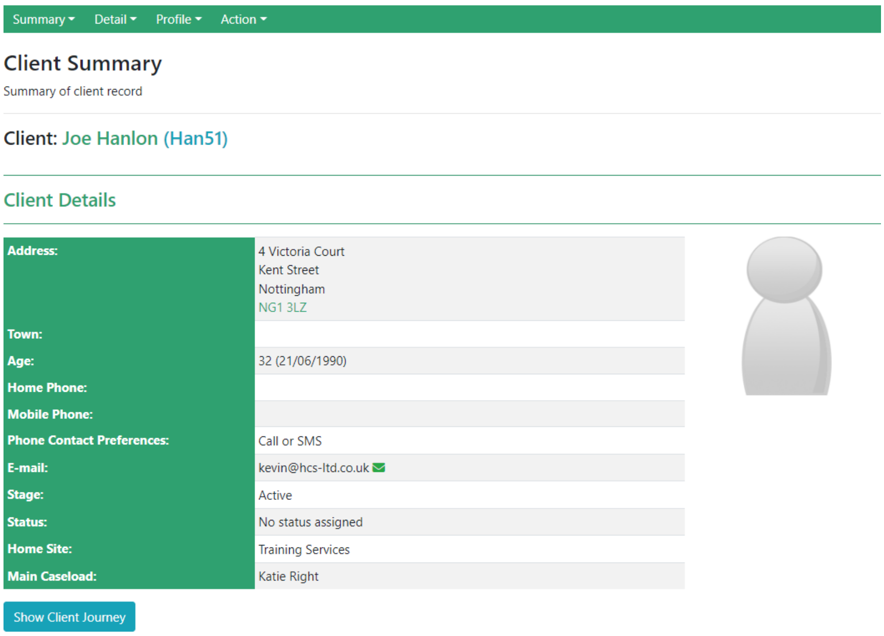
The menu at the top of the screen allows you to select different options for that client:

- **Summary** – displays basic contact information of the client
- **Detail** – allows the editing of contact information
- **Profile** – allows recording for profiling the client including profile items, employment, and education history, as well as recording soft outcomes
- **Action** – allows you to record and assign activities, upload documents, assign programmes/appoints/meetings/referrals/share request etc

The client reference given to the client at registration (the first three letters of their surname, followed by a number generated by the system) is shown at the top of the client page and is a unique code for the client.

3.1 Summary Screen

Once you have selected the required client the summary screen will be displayed with their basic contact information.



Some key features:

1. If the email icon is green this means they are contactable. Selecting the icon will take you into your email. If the icon is red this means they do not want to be contacted. It will also inform the user what the clients contact preferences are.

2. It is advised to always have a main caseload attached to a client.

3. The postcode if the address exists is a link and will open in google maps.

4. Client journey is a good tool for tracking the progress of a client from the beginning of their journey on Hanlon to present day.

5. If you have uploaded a picture of the client, it will appear on the right-hand side.

3.2 Client activities and outcomes

This sub-tab displays ‘Activities’ and ‘Outcomes’. Activities are key areas to keep up to date, track and for reporting purposes.

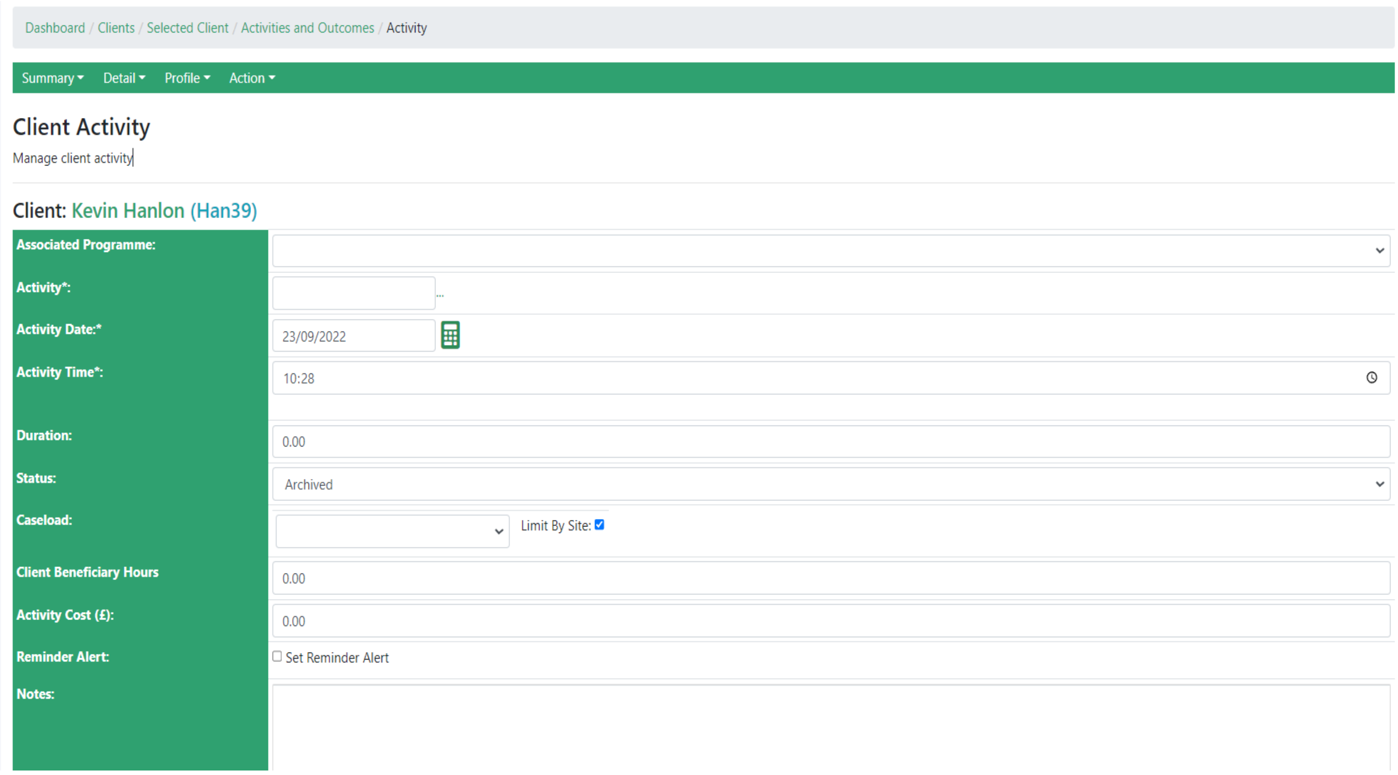
Activities can be triggered automatically from various areas of the system, such as:

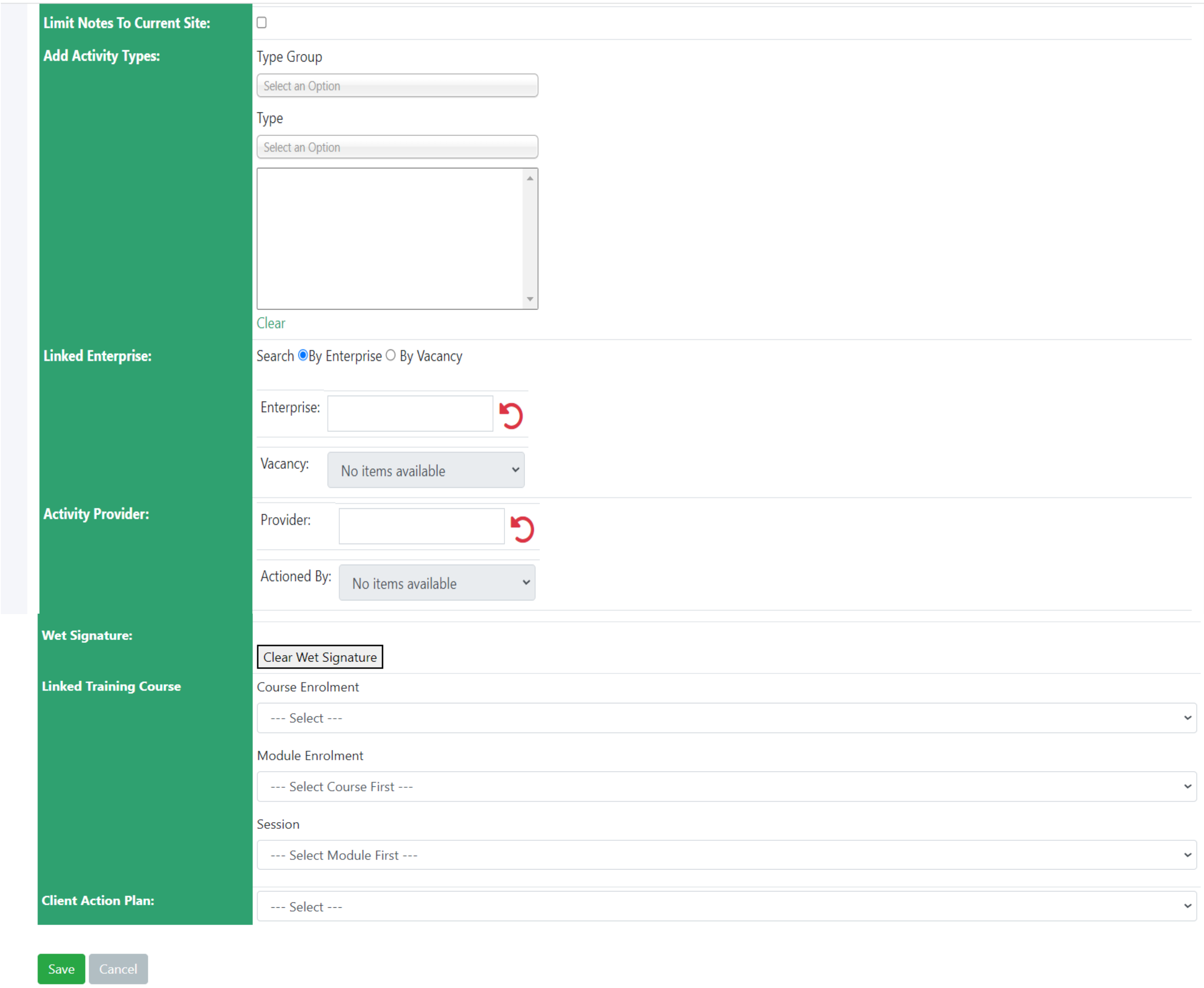
1. When completing a training course
2. Adding a client to a programme
3. Registering a client on the registration form.
4. Appointment booking, cancellations, completed etc.
5. Added to events.

They can be configured through their designated modules or by the admin set up. Activities can also automatically trigger various client stages, statuses and outcomes as well.

3.4 Adding an activity

To add an new activity, select the blue ‘add’ button. The following form will appear:





All fields with an * next to the field name are treated as mandatory. Details are shown below for how to complete each field:

3.4.1 Associated Programme

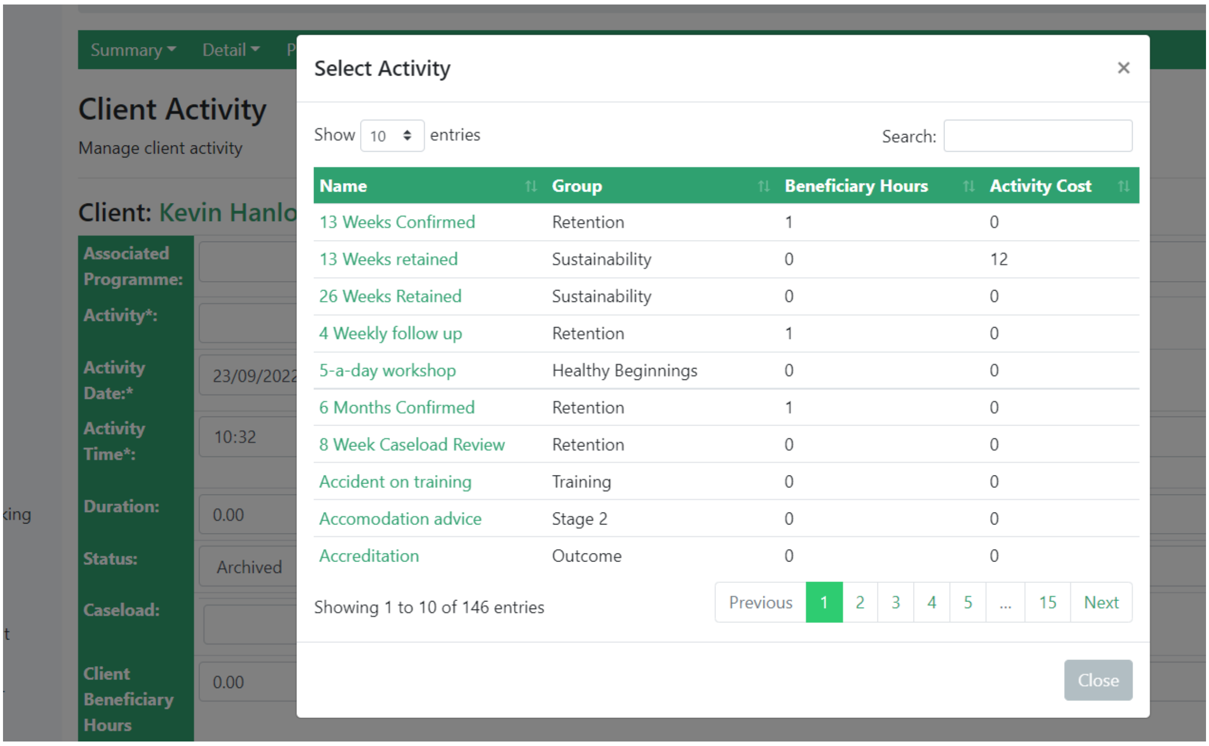
The first field 'Associated Programme' allows the user the select the programme the activity is associated by picking the programme from the drop down box. The list of programmes is populated by the programmes the client belongs to, therefore there will be no available associated programmes if the client doesn't belong to any programmes. If you have forgotten to add the programme to the client record, you can do this either from the registration form if the question is available or by going into the programme tab and adding the client from there. Further information on how to add a client to a programme can be found in **chapter 4.**

3.4.2 Activity Name

The field 'Activity' is used to specify what activity is taking place. The process of filling out the form is the same regardless of what Activity you are adding, the only thing that changes is the Activity name. However you should take into consideration the circumstances of the activity. For example, how you fill in the form may differ if you were recording a phone call compared to a job start.

Activity name is a mandatory field and you can add the activity by typing into the box. A filtered drop down list of available activities will appear. Or you can select the small three dots next to the field, this will give you a pop up that allows you to search through all available activities.

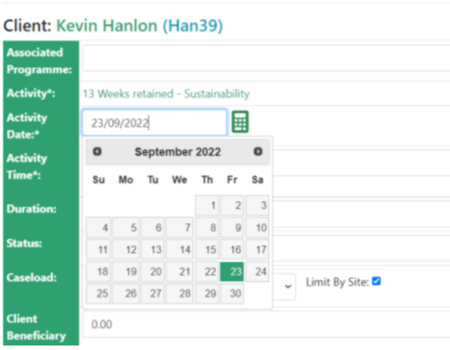
Please note, the activity list can filter depending on the permissions/site of the user and if a programme has been selected. Individual programmes can have their own filtered list of activities and only show when the programme is selected. The activity list can also be filtered by the site the user is on. Admins will be able to see all activities in the list.



Select the name to add the activity to the form. If you have added it by mistake, click on the activity name in green and this will delete the activity from the field.

3.4.3 Activity Date

Now the Activity is specified you need to input the date on which the Activity occurred. The date can either be entered or selected using the calender extender. The calculator icon next to the field is also useful for follow up activities as it allows you to easily calculate the date in x amount of time. The activity date can be future or past dated as well. Activity date is a mandatory field.



3.4.4 Activity Time

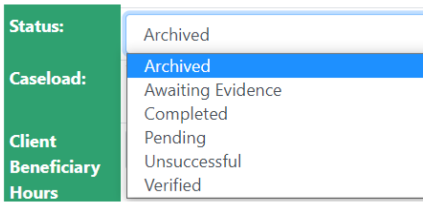
This is also a mandatory field. This sets the time the activity has taken place. If the activity doesn't have a specific time associated, then record the time as the time you have added the activity.

3.4.5 Duration

Duration is how long the activity took the client. For example, how long was the meeting or phone call.

3.4.6 Status

This field records the status of the activity that has been added. This is not a mandatory field but is very important in the tracking of activities. The system will have standard statuses in as shown below but it is possible for more to be added if required.



The most used statuses and their meanings are:

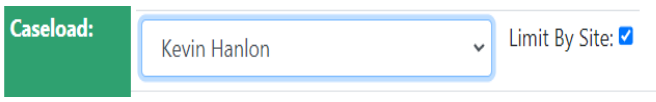
- **Incomplete/Pending –** The Activity has not yet happened and may be in the future.
- **Successful –** The Activity has already occurred and it was completed successfully.
- **Unsuccessful –** The Activity has already occurred but it was not completed successfully.
- **Archived –** Used for archiving old statuses.
- **Verified and not verified –** Can be used to point out which activities still need verifying.

As activities are viewed from various other modules in the system, the statuses are very important to keep track of clients and their actions.

The statuses can also be tracked in the alerts. The alerts has a section for upcoming and incomplete activities to help you track activities across your clients.

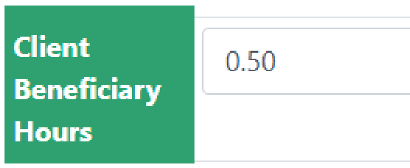
3.4.7 Caseload

Select from the drop down which caseload advisor is responsible for this individual activity. It does not need to be the main caseload of the client. Having the 'limit by site' option ticked will only show clients within your site group. Unticking this will show every caseload in the system.



3.4.8 Client Beneficiary hours

This field is to record how long the client took to complete the activity.



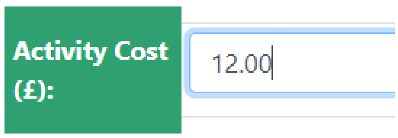
Hours should be input in the following format :

1.00 = 1 hour

0.75 = 45 minutes (three quarters of an hour)

0.50 = 30 mins (half hour)

0.25 = 15 minutes (quarter of an hour)



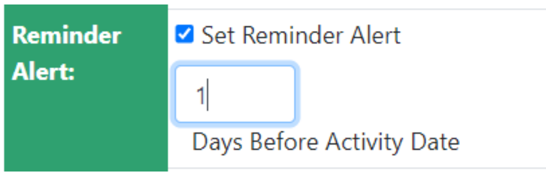
3.4.9 Activity Cost

This field is to record how much the activity cost. This can be used for areas such as expenses.

Cost should be input without £ signs and, with the number of pounds preceeding the decimal and the number of pence following it i.e. £100 would be 100.00.

3.4.10 Reminder Alert

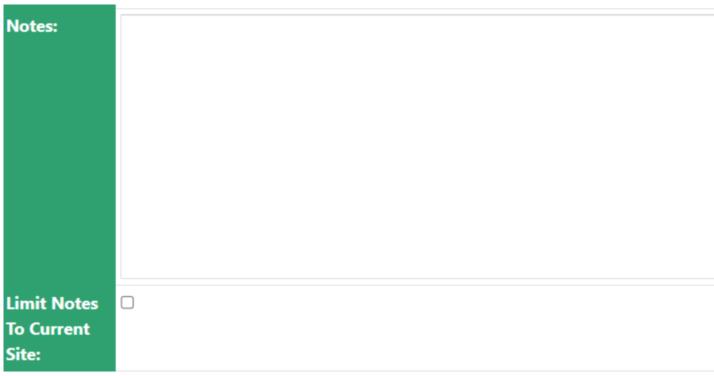
The reminder alert tick box allows you to set a reminder before the activity takes place.



When you tick the tick box you will be presented with another box in which you can decide how many days before the activity you wish to be reminded. The reminder will show in the users alerts.

3.4.11 Notes

Notes can be added to any Activity giving more detail about what occurred during this particular session / action.



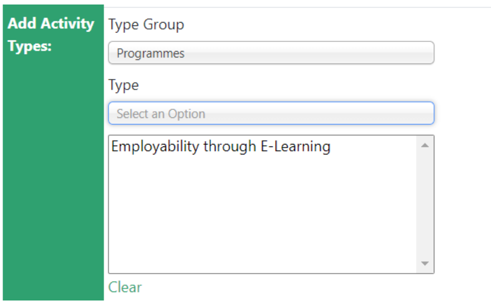
At times some information you wish to record may be confidential or private. On sharing a client record with a partner organisation you will immediately be giving access to all Activities and Notes you have created, unless they have been made private. It is important to understand this and take care when entering notes or sharing records.

To make Notes Private. Tick the 'Limit Notes to Current Site' check box.

If the 'Limit Notes to Current Site' check box is ticked, partner organisations with access to the record will be able to see the Activity has taken place but will not be able to read the Notes.

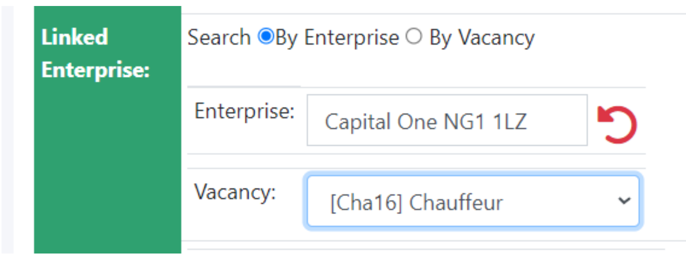
3.4.12 Add activity types

Pre-set tags for further information about an activity can be attached in this section. Once the types have been entered into the system, you are able to assign this type to an activity. This can be used to label or give further information about an activity. Select the group from the top drop down and then options will show below under the 'type' drop down.



3.4.13 Linked Enterprise and Vacancy

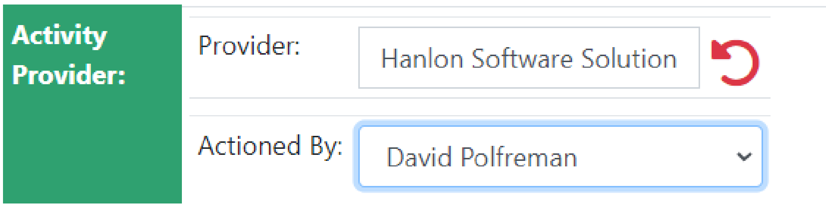
If the activity being added relates to an existing enterprise or vacancy in the system, you can link this up by using the following fields. You can either add both the enterprise and vacancy in, or just by enterprise or by just vacancy by switching the option to 'by vacancy'. If you begin typing into the fields the enterprise and vacancy will appear in a drop down list.



If the enterprise or vacancy doesn't already exist in the system you can skip this section or go into both of the modules to add them and then return to the form.

3.4.14 Activity Provider

The Activity Provider field asks who is providing the Activity? This is normally the caseload. Again, the Activity Provider field is type ahead. Begin typing to find your organisation. If the provider does not appear in the list, they will need to be set up within the enterprise module and through admin side.

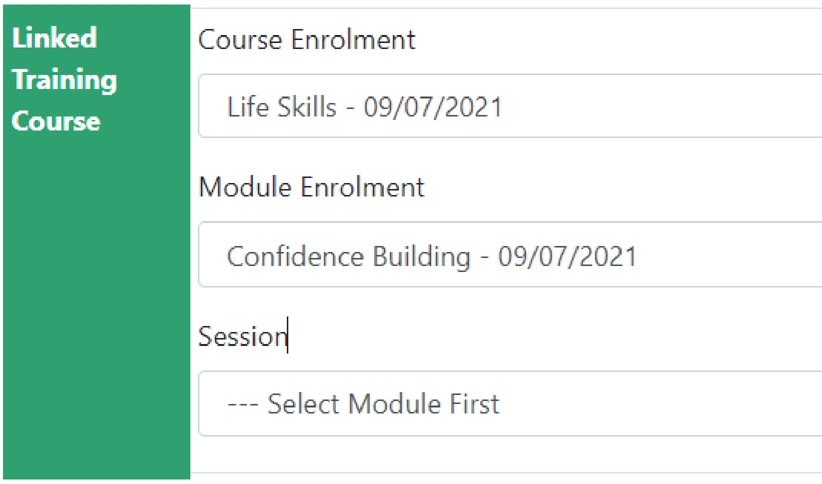


Once the Provider field has been populated, the caseload officers for that site are listed. If the caseload is not appearing, this will need to be set up on the admin side. Ensure both fields are filled in to save the activity.

3.4.15 Wet Signature

This gives the option of a digital signature attached to the activity. To add a signature, click onto the box and drag your cursor. There is a clear button below if a mistake was made.

3.4.16 Training



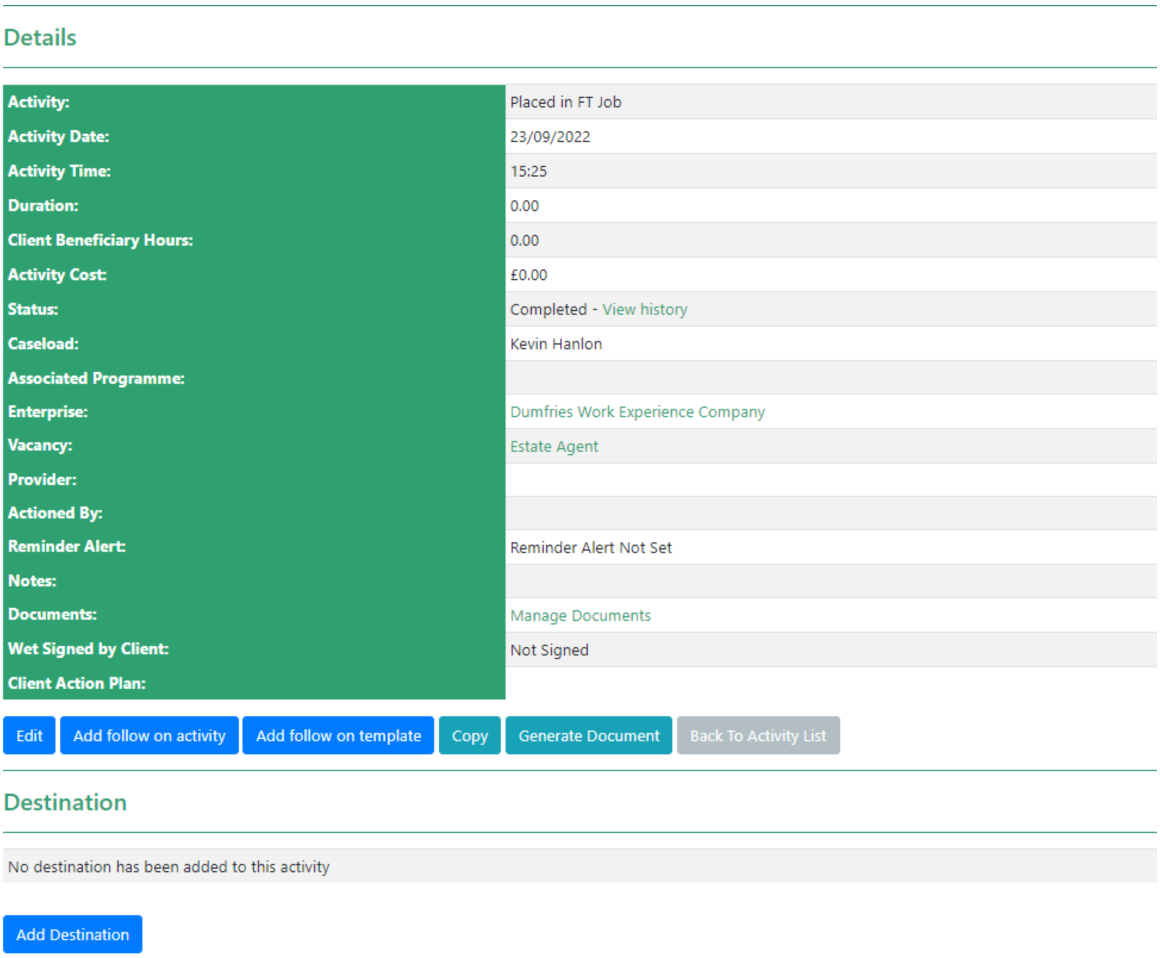
If the client is attached to a training course, you can connect the activity up to the training course, module and session that the client is on. This connection will also be shown with the training course module. The drop downs will only appear, if the client is on a training course, module and session. If they are blank, you will need to enrol a client onto a training course via the training course module. When attaching an activity to a training course, all three fields do not need to be filled in. It is acceptable to just attach to one of the fields.

3.4.17 Action Plan

This is a useful section to attach an activity to an client action plan. The drop down will only show previously created action plans. If the field is blank, a new action plan will need to be created. Once the activity and action plan have been connected, all activities that are attached to the action plan will show within the action plan sub tab.

3.5 Saved activities

Once the activity has been saved you will see the following form. You can also get to this page by going onto the activities tab and selecting the name on a saved activity.


Details

Activity:	Placed in FT Job
Activity Date:	23/09/2022
Activity Time:	15:25
Duration:	0.00
Client Beneficiary Hours:	0.00
Activity Cost:	£0.00
Status:	Completed - View history
Caseload:	Kevin Hanlon
Associated Programme:	
Enterprise:	Dumfries Work Experience Company
Vacancy:	Estate Agent
Provider:	
Actioned By:	
Reminder Alert:	Reminder Alert Not Set
Notes:	
Documents:	Manage Documents
Wet Signed by Client:	Not Signed
Client Action Plan:	

Edit | Add follow on activity | Add follow on template | Copy | Generate Document | Back To Activity List

Destination

No destination has been added to this activity

Add Destination

If any enterprise or vacancies were attached to the form, a quick link has been added to them.

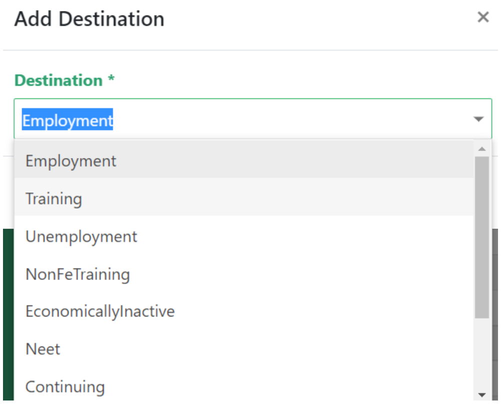
You can also view the history of who has changed the status of the activity.

Finally, if you select the ‘manage document’ link, this will allow you to upload documents to this individual activity. It is then useful to use the activity status to perhaps say whether it is ‘verified’ or ‘not verified’. To edit any of the existing details, select the blue ‘edit’ button.

3.6 Destinations

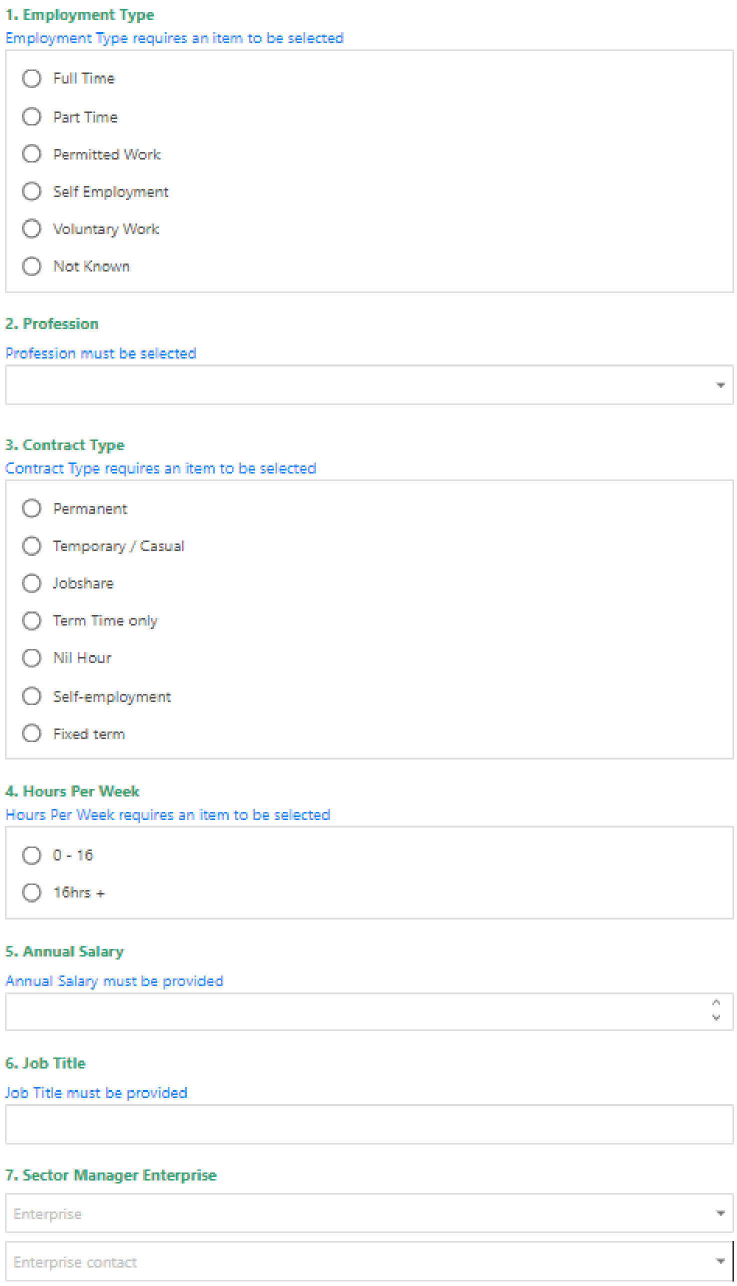
Destination information can be filled in for when a client has achieved an outcome such gained employment, sustained employment or undergone training. Certain activities can require a destination to be inputted whereas for others it is just optional. You will be prompted to add a destination when the activity requires one.

To enter a destination, select the blue 'add destination' button from the example in section 3.5. Alternatively, from the activities and outcomes, select the activity name and an edit destination button will appear like the image above.



Each system can have their own destination forms for various reasons. The questions and content can also differ per system. Select from the drop down which is most appropriate for this activity.

Below is an example of a typical employment destination form. The majority of the fields will be option items, drop downs and text boxes.

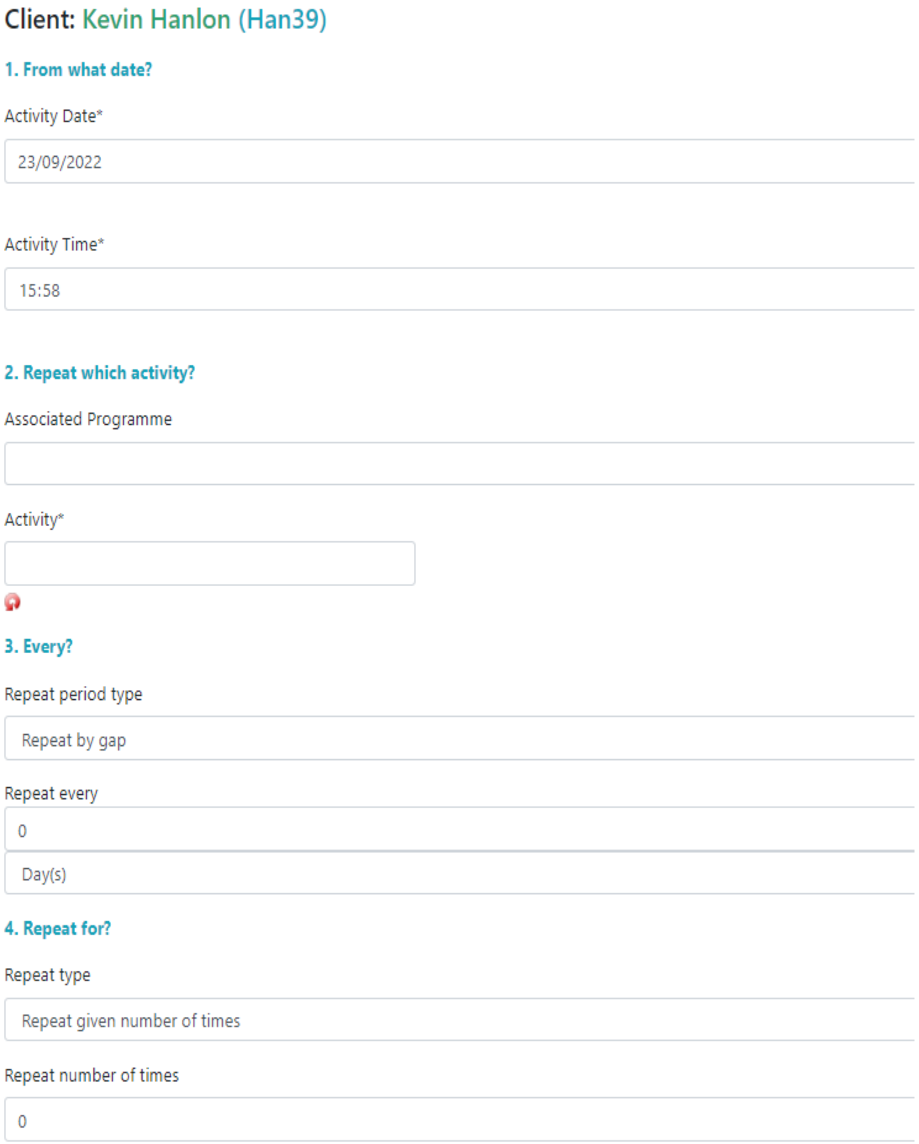


For the sector manager enterprise, this drop down is linked to the enterprise module. Similar as the field on the activity form. If the enterprise and enterprise contact that is required, do not exist in the system they can either be added by going into the enterprise module or a link can be added which will allow the user to add the form straight from this page.

3.6 Schedule

If you are going to regularly provide an Activity to a client, you can schedule that Activity to take place at a specified period. For example, if you had a phone call with a client every Friday, you can use this option to pre schedule them in for you.

To set up a schedule, go onto the activities and outcome page and select the blue button 'add schedule. This will bring you to an exact copy of the add activity form that is displayed in section 3.4, but with a few more fields at the top of the form. The new fields to take note are below:


Client: Kevin Hanlon (Han39)

1. From what date?

Activity Date*

23/09/2022

Activity Time*

15:58

2. Repeat which activity?

Associated Programme

Activity*

3. Every?

Repeat period type

Repeat by gap

Repeat every

0

Day(s)

4. Repeat for?

Repeat type

Repeat given number of times

Repeat number of times

0

Schedule Details:

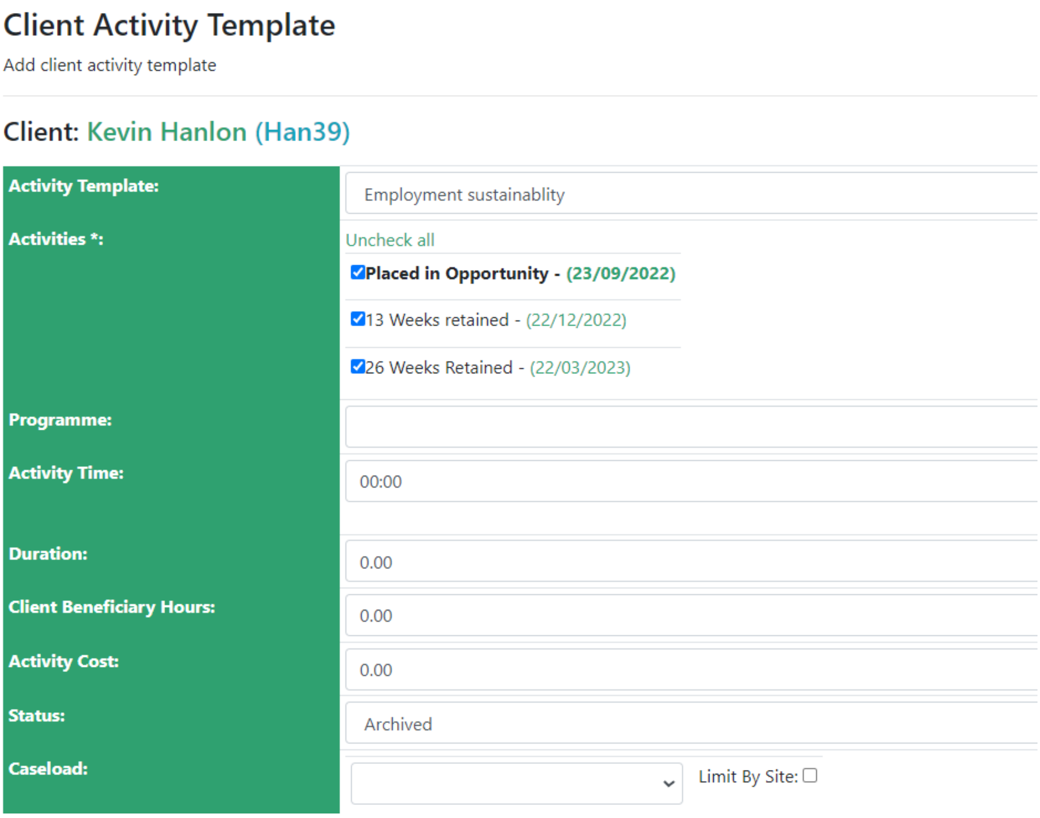
1. Choose the date and time you want the Schedule to start from
2. Choose the Activity you want to Schedule (you can only use one). If you select a programme, only the activities assigned to the programme will be available.
3. Choose either 'Repeat by gap' or 'Repeat by day' then the gap period in Day(s), Week(s), Month(s), Quarter(s), or Year(s)
4. Choose the number of times you want to repeat the Activity for
5. Set the normal Activity Defaults that you normally select within Activity Detail. It is advised if the activities are in the future, to set the status as 'pending' or 'incomplete.

Once saved, the activities will be pre-populated for this period. Remember to keep updating them!

3.5 Templates

When recording sustainment or activities that need to be triggered at certain periods of time, templates can be used to help manage this. Templates are set up so when a certain activity is added to a client record, several other activities will then be automatically added via a certain time frame. This is most used for sustainment. The template itself needs to be added into the system by the administrator but once added it can then be used against a client record.

To add a new template, go onto the activities and outcome page and press the blue button 'add template'. The following form will then appear:



Client Activity Template

Add client activity template

Client: Kevin Hanlon (Han39)

Activity Template:	Employment sustainablity
Activities *:	Uncheck all ☑ **Placed in Opportunity - (23/09/2022)** ☑ 13 Weeks retained - (22/12/2022) ☑ 26 Weeks Retained - (22/03/2023)
Programme:	
Activity Time:	00:00
Duration:	0.00
Client Beneficiary Hours:	0.00
Activity Cost:	0.00
Status:	Archived
Caseload:	Limit By Site: ☐

The form that appears, again like section 3.4 is the same normal activity form but with a few different options at the top of the form.

- **Activity Template** – this drop down will contain the templates that have already been set up by the administrator.
- **Activities** - Once the option has been selected; the activities that have been structured to follow will then appear as options. They will also show the dates that the activities will be triggered on. You can unselect one of the activities if you feel it is not appropriate.

After these fields, continue to fill out the rest of the form as normal. It is recommended again to set the status as pending/incomplete as it will be in the future. It may also be worth adding 'set reminder alert' so the caseload is alerted that there are upcoming activities. Then save!

3.6 Outcomes

Outcomes are significant achievements a client has made on their pathway through the programme/project they are involved with. Certain activities will be linked to certain outcomes, and these are set up by the administrators of the system. When a successful activity which is linked to an outcome is added to a client, the outcome is automatically added. This can be seen from the activities and outcome page.

Outcomes

Date	Name
23/09/2022	Placed in Job
11/03/2016	Placed in Job
22/05/2009	Registered

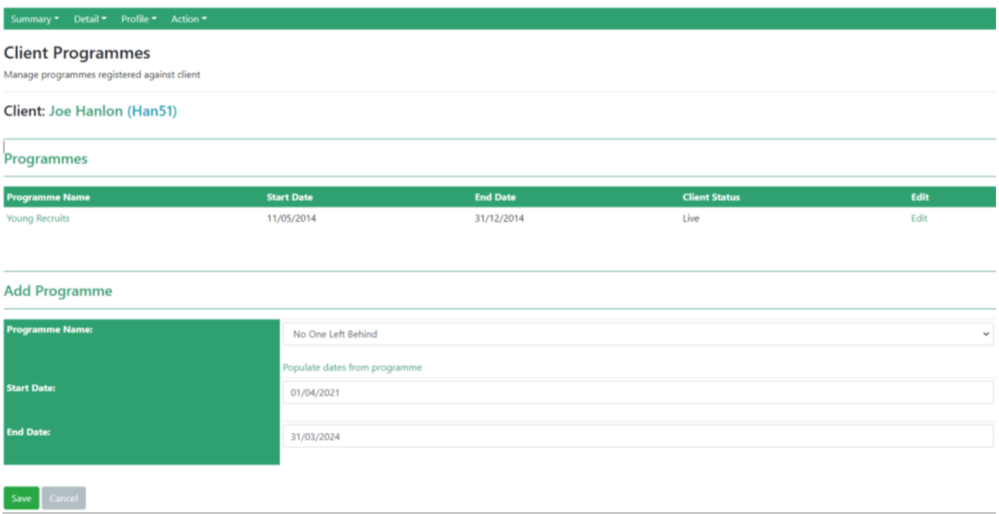
XLS

Chapter 4: Programmes

4.1 Add/edit programmes

This sub-tab displays the programmes the client has been assigned**.** If the client has already been assigned to a programme from the registration form, this will also be displayed here.

The associated programme field on client activities will not populate unless the client has been added to a program which can be done from this page. To add a client to a programme, press the blue 'add' button. The following will display:



- To add a Programme choose from the drop down list. If the programme doesn't exist you will need to go into the programmes module to create a new one.
- Enter a start and end date for the client on the programme. These dates have to fall within the start and end date of the programme. You can choose to use the start and end date of the programme by using the 'Populate dates from programme' button.
- You can add more than one Programme to a client

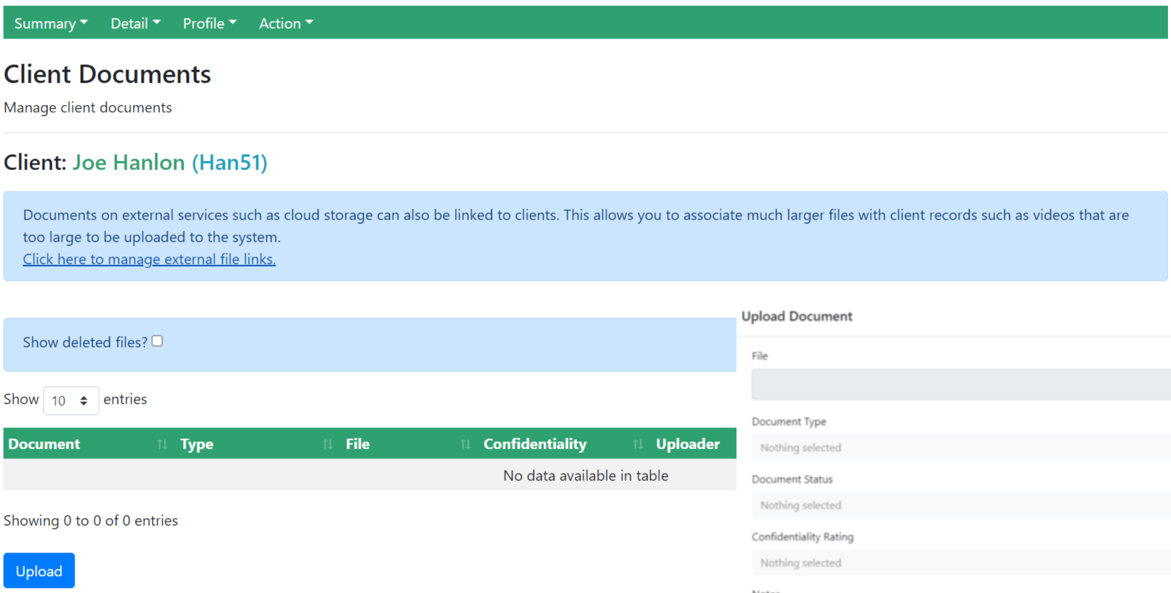
As well as being able to add programmes to clients through the programmes tab, you can also edit the client's start and end dates for existing programmes they are attached to. To do this click the edit button next to the programme record you wish to edit. This will bring up the same form as above.

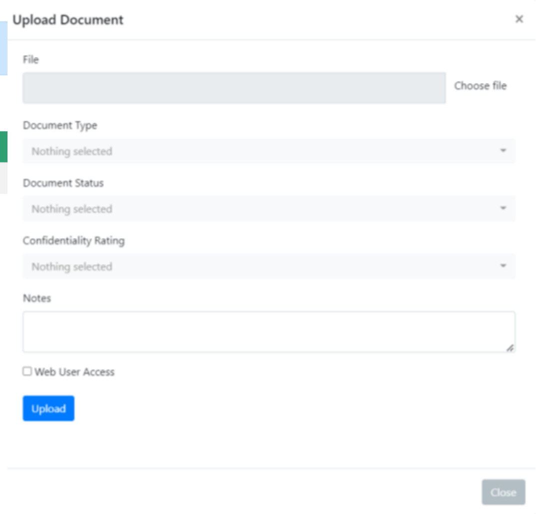
Chapter 5: Documents

5.1 Upload documents

To upload documents to a client record, select the 'action' option on the green navigation bar and then 'documents. This sub-tab allows users to upload clients' documents to the client record and download them.

The documents external tab is a backup option if the document being uploaded will not fit within the normal document section.





To upload a new document, select the blue 'upload' button. The following will then appear:

Select the 'choose file' option on the right-hand side. A window will appear allowing you to browse to the file you wish to upload. Once found, select the file, and click 'open' to attach it.

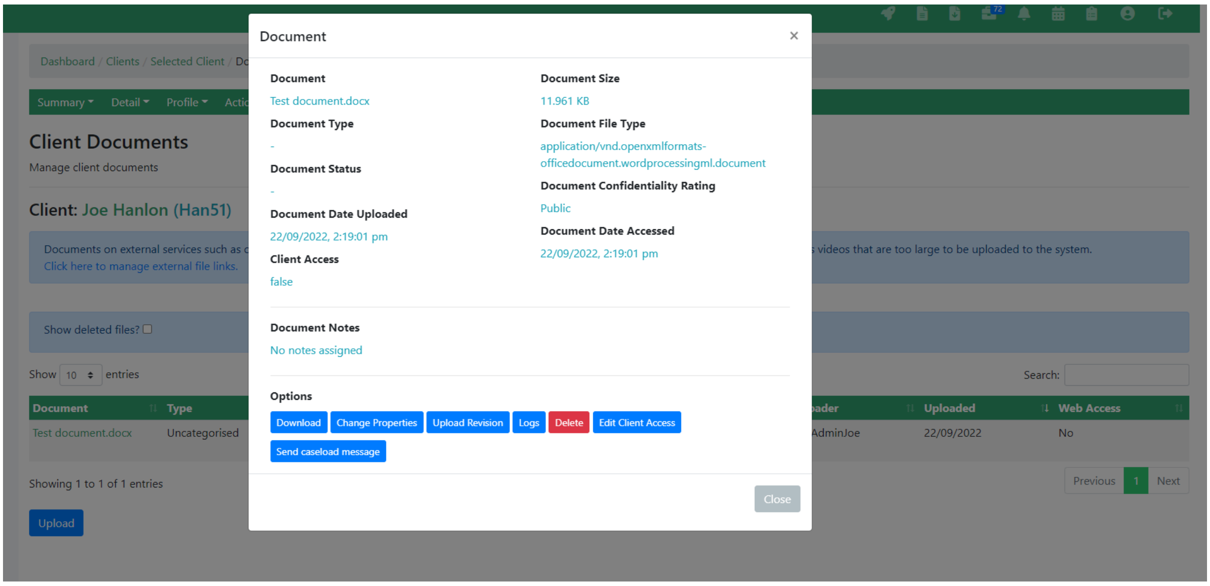
The options afterwards are not mandatory but can be useful:

- Document type allows you to set what type of document it is, i.e CV, Passport, proof of address etc. These can be selected from the drop down.
- Document status can be used to set the status of the document such as verified or not verified.
- Confidentiality rating allows you to set which sites should only be viewing this document.
- The notes section allows for further notes to be added about the document.
- Web user access allows client portal users to view certain documents on their portal account if ticked.

Once you are ready, press the upload to upload the document. A confirmation message will appear afterwards once it is successfully uploaded.

5.2 Download documents

To download a previously uploaded document, select the name of the document and a window will appear:



You then have the following options:

1. Download will download the document to your computer for you to review. If you make changes on this file, you must re-upload.
2. Change properties allows you to update the type, status and confidentiality.

3. Upload revision is to be used to re-upload the document with new changes
4. Logs shows who has accessed the document
5. Delete the document
6. Edit client access is updating whether the portal client user can see this document.
7. Send caseload message will send a message to a caseload within the system. Typically used for them to review the document etc.