

User Guide 2010

S2Splus Service Record System

Administrators and Coordinators
Friday 30 April 2010

User Guide 2010

Acknowledgement

Infoxchange Australia acknowledges the contribution of Micah Projects to the development of the Service Record System (SRS).

User Guide 2010

Table of Contents

1.0	Introduction.....	5
2.0	Administrator Access Level.....	7
2.1	Home Section.....	7
2.2	Reports Section.....	7
2.3	Admin Section.....	8
2.3.1	Financial Transactions.....	8
2.3.2	Manage Users.....	9
3.0	Coordinator Access Level.....	17
3.1	Home Section.....	17
3.2	Persons Section.....	18
3.3	Groups Section.....	18
3.4	Days Section.....	19
3.5	Reports Section.....	19
3.6	Admin Section.....	20
3.6.1	Merge Tab.....	20
3.6.2	Audit.....	25

Section 1

Introduction

User Guide 2010

1.0 Introduction

Service Record System (SRS) is an online client management system designed specifically for the community services sector. SRS enables organisations to record all information regarding individuals and families receiving support. It also generates reports to assist with managing service delivery or to provide information to stakeholders, such as the Australian Institute of Health and Welfare (AIHW).

The system is shared across teams within an organisation and can be accessed from any computer with an internet connection. Depending on your level of access the screens within this User Guide may look a little different. Employees will have more or less menus available to them depending on what is required to undertake their position.

Normally one person within an organisation will be provided access to the Service Record System (SRS) and will add users and assign roles. The Normal User and Reception Worker access levels are covered in a separate User Guide. The Administrator and Coordinator access levels are covered in this User Guide.

Section 2

Administrator Access Level

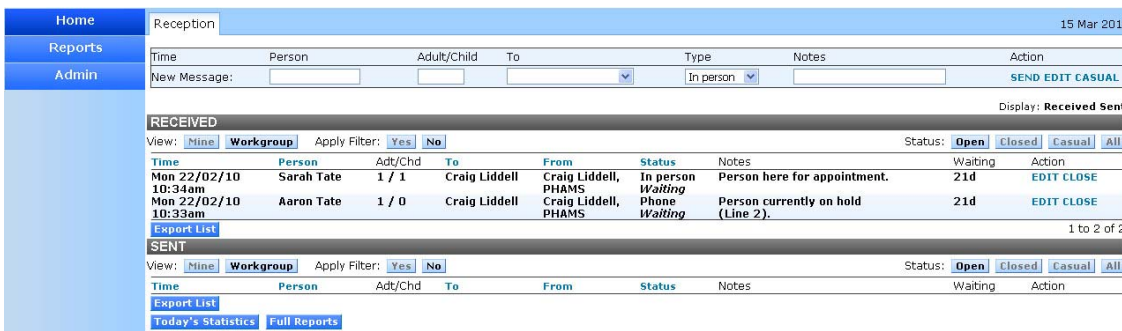
User Guide 2010

2.0 Administrator Access Level

Administrator access level enables you to access the following Sections: Home, Reports, and Admin.

2.1 Home Section

Only the Reception Tab is available in the Home Section.



The screenshot shows the 'Reception' tab selected in the Home section. The interface includes a navigation menu on the left with 'Home', 'Reports', and 'Admin' options. The main content area displays a 'RECEIVED' section with a table of messages. The table has columns for Time, Person, Adt/Chd, To, From, Status, Notes, Waiting, and Action. Two messages are listed:

Time	Person	Adt/Chd	To	From	Status	Notes	Waiting	Action
Mon 22/02/10 10:34am	Sarah Tate	1 / 1	Craig Liddell	Craig Liddell, PHAMS	In person	Person here for appointment.	21d	EDIT CLOSE
Mon 22/02/10 10:33am	Aaron Tate	1 / 0	Craig Liddell	Craig Liddell, PHAMS	Phone	Person currently on hold (Line 2).		EDIT CLOSE

Below the 'RECEIVED' section is a 'SENT' section with a similar table structure. The interface also includes various filters and buttons like 'Export List', 'Today's Statistics', and 'Full Reports'.

As detailed in the Normal User Guide, the Reception Tab enables you to send and receive messages to your Workgroup and Cluster. It also enables you to record Casual Contacts.

2.2 Reports Section

Administrator Access Level enables you to access the Reports Section.



The screenshot shows the 'Reports' section of the S2Splus system. The top navigation bar includes 'Home', 'Reports', and 'Admin'. The 'Reports' section is active, showing a 'Service Record System DEMO' header. The interface includes a navigation menu on the left and a main content area with various filters and options:

- Workgroup:** Mirabel Foundation
- Report type:** Please select...
- Include in report:** Persons with allocated key worker from this workgroup
- Report period:** Select range from list or enter start and end dates:
 - Start date: 15/03/2010
 - End date: 15/03/2010
- GENERATE REPORT** button

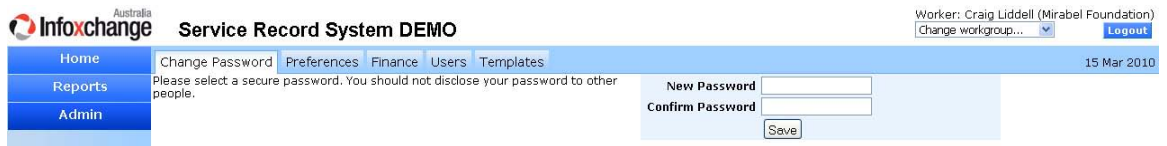
The top right corner shows the user's name: 'Worker: Craig Liddell (Mirabel Foundation)' and a 'Logout' button.

Instructions for generating Reports are detailed in the Normal User Guide.

User Guide 2010

2.3 Admin Section

Administrator Access Level allows you additional privileges beyond Normal User and Reception Worker access levels. You are able to generate Finance reports and manage Users.



Infoxchange Australia Service Record System DEMO Worker: Craig Liddell (Mirabel Foundation) 15 Mar 2010

Change Password | Preferences | Finance | Users | Templates

Please select a secure password. You should not disclose your password to other people.

New Password:
 Confirm Password:

2.3.1 Financial Transactions

To generate a list of financial transactions:

1. Select a date range by either using the blue pull down menu at the top of the screen or by using the calendar icon.

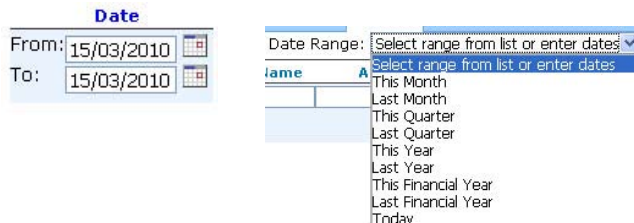


Infoxchange Australia Service Record System DEMO Worker: Craig Liddell (Mirabel Foundation) 15 Mar 2010

Change Password | Preferences | Finance | Users | Templates

Workgroup: Mirabel Foundation | Date Range: Select range from list or enter dates

Date	First Name	Last Name	Account	Payment Type	Worker	Amount	Action
From: 15/03/2010						Total: \$0.00	Apply Filter
To: 15/03/2010							Clear Filter
TOTAL:						\$0.00	



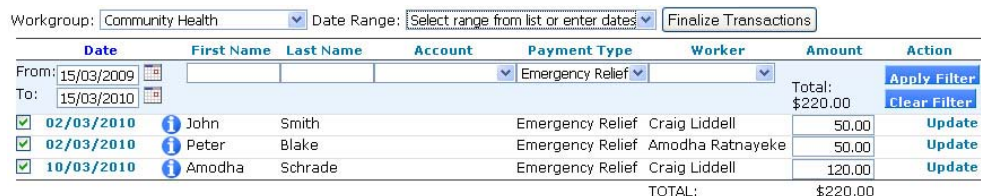
Date

From: 15/03/2010
To: 15/03/2010

Date Range: Select range from list or enter dates

- Select range from list or enter dates
- This Month
- Last Month
- This Quarter
- Last Quarter
- This Year
- Last Year
- This Financial Year
- Last Financial Year
- Today

2. You can filter by Date, First Name, Last Name, Account, Payment Type, or Worker. Once one of the options has been selected, Click 'Apply Filter'.



Workgroup: Community Health | Date Range: Select range from list or enter dates | Finalize Transactions

Date	First Name	Last Name	Account	Payment Type	Worker	Amount	Action
From: 15/03/2009				Emergency Relief		Total: \$220.00	Apply Filter
To: 15/03/2010							Clear Filter
<input checked="" type="checkbox"/>	02/03/2010	John	Smith	Emergency Relief	Craig Liddell	50.00	Update
<input checked="" type="checkbox"/>	02/03/2010	Peter	Blake	Emergency Relief	Amodha Ratnayeke	50.00	Update
<input checked="" type="checkbox"/>	10/03/2010	Amodha	Schrade	Emergency Relief	Craig Liddell	120.00	Update
TOTAL:						\$220.00	

User Guide 2010

Please note that:

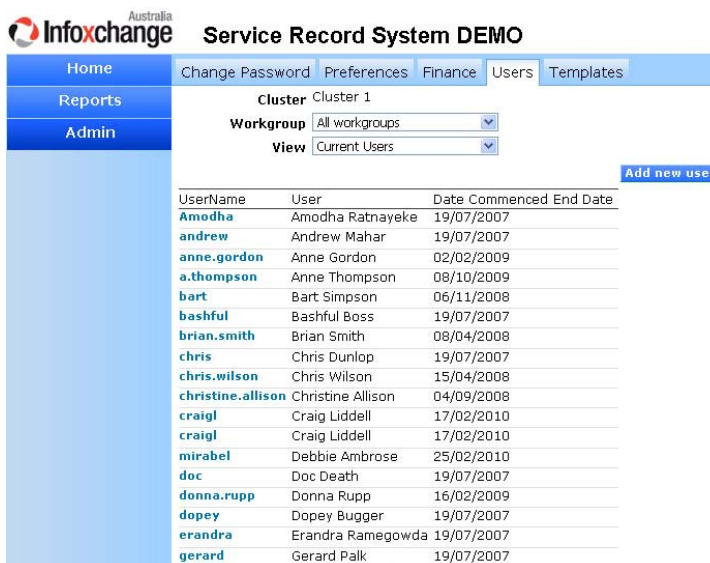
- » Clicking on the Date will take you to the detailed transaction record.
- » You can update the transaction amount by entering the updated figure in the Amount field and clicking Update.

Amount	Action
Total:	Apply Filter
\$230.00	Clear Filter
60.00	Update
50.00	Update
120.00	Update
\$230.00	

- » Clicking on 'Finalize Transactions' locks the transactions that have been selected by using the tick box on the left hand side. You are unable to edit finalised transactions.
- » Organisations often finalise transactions following reconciliation of SRS records and internal financial systems.

2.3.2 Manage Users

Administrator access level also allows you to manage Users.



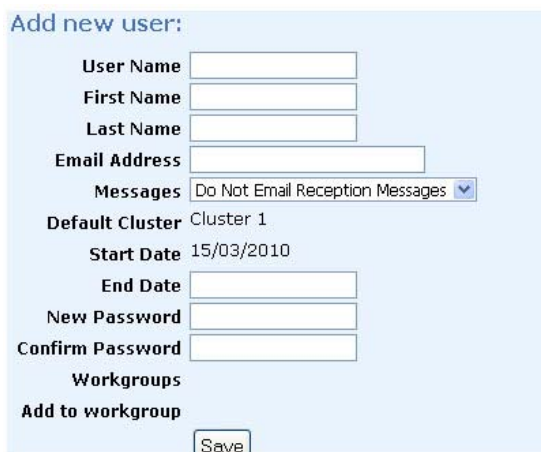
The screenshot shows the 'Users' management page in the Infoxchange Australia Service Record System DEMO. The page has a navigation menu on the left with 'Home', 'Reports', and 'Admin' (selected). The main content area includes tabs for 'Change Password', 'Preferences', 'Finance', 'Users', and 'Templates'. Under the 'Users' tab, there are dropdown menus for 'Cluster' (Cluster 1), 'Workgroup' (All workgroups), and 'View' (Current Users). An 'Add new user' button is located on the right. Below these controls is a table listing users with columns for Username, User, Date Commenced, and End Date.

UserName	User	Date Commenced	End Date
Amodha	Amodha Ratnayake	19/07/2007	
andrew	Andrew Mahar	19/07/2007	
anne.gordon	Anne Gordon	02/02/2009	
a.thompson	Anne Thompson	08/10/2009	
bart	Bart Simpson	06/11/2008	
bashful	Bashful Boss	19/07/2007	
brian.smith	Brian Smith	08/04/2008	
chris	Chris Dunlop	19/07/2007	
chris.wilson	Chris Wilson	15/04/2008	
christine.allison	Christine Allison	04/09/2008	
craigl	Craig Liddell	17/02/2010	
craigl	Craig Liddell	17/02/2010	
mirabel	Debbie Ambrose	25/02/2010	
doc	Doc Death	19/07/2007	
donna.rupp	Donna Rupp	16/02/2009	
dopey	Dopey Buggler	19/07/2007	
erandra	Erandra Ramegowda	19/07/2007	
gerard	Gerard Palk	19/07/2007	

User Guide 2010

To add a new User:

1. Click 'Add new user' and the following dialog box will appear.



Add new user:

User Name

First Name

Last Name

Email Address

Messages

Default Cluster Cluster 1

Start Date 15/03/2010

End Date

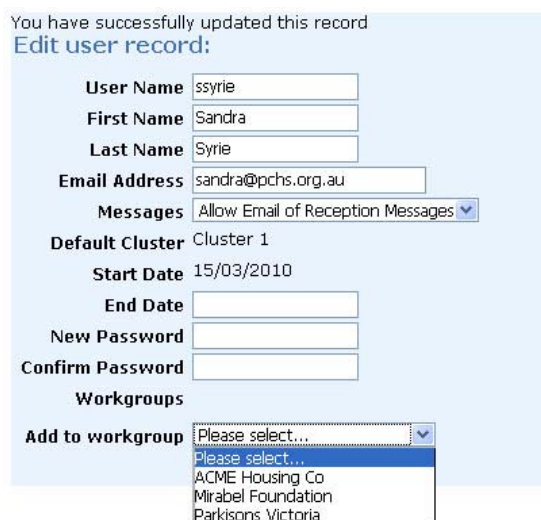
New Password

Confirm Password

Workgroups

Add to workgroup

2. Enter the User Name, First Name, Last Name, and Email Address.
3. Select whether the User will be able to receive reception messages via email by using the blue pull down menu.
4. Enter an End Date should you wish to limit the access period. For example, when the User has a time limited contract with your organisation.
5. Enter the password in the New Password and Confirm Password fields.
6. Click Save. The following dialog box will appear.



You have successfully updated this record

Edit user record:

User Name

First Name

Last Name

Email Address

Messages

Default Cluster Cluster 1

Start Date 15/03/2010

End Date

New Password

Confirm Password

Workgroups

Add to workgroup

Please select...
ACME Housing Co
Mirabel Foundation
Parkisons Victoria

User Guide 2010

7. Add the User to Workgroups by using the blue pull down menu.
8. Click Save.
9. Service Record System (SRS) will prompt you to nominate an access level. There are four options: Administrator, Coordinator, Normal User, and Reception Worker.



10. Click Save.

Please note that:

- » When you have selected the tick box to the right of the access level, a staff member will be provided with all rights associated with the access level as detailed overleaf.
- » Should the tick box be unchecked, a staff member will be provided with all rights associated with the access level, but will not appear as a Worker within Workgroups or in any pull down menus where you can select a Worker.
- » For example, a 'non-operational' staff member at a head office may require access to all data for the purposes of monitoring and reporting. However, he or she is not a Worker for the purposes of case and client management.
- » A staff member who has Coordinator access level can also delete certain items, such as Notes or Plans.
- » To remove a user from a Workgroup, click [Remove from group](#).

User Guide 2010

Normal User and Reception Worker Access Levels

Sections Available	Tabs Available	Normal User	Reception Worker
Home	My List My Team's List My Actions My Team's Actions Referrals Reception	All	Reception
Persons	Search Details Notes Alerts Consent Referrals Plans Payments Tasks Outcomes Documents Membership	All	None
Groups	Groups Waiting Lists Fulfilment Activity Management	All	None

User Guide 2010

Normal User and Reception Worker Access Levels: Continued

Sections Available	Tabs Available	Normal User	Reception Worker
Days	Notes Payments Tasks Accommodation	Notes Payments Tasks	None
Reports	Reports Lists Financial Referrals Groups Reception Results	All	None
Admin	Change Password Preferences Finance Merge Users Templates	Change Password Preferences	Change Password Preferences

User Guide 2010

Administrator and Coordinator Access Levels

Sections Available	Tabs Available	Administrator	Coordinator
Home	My List My Team's List My Actions My Team's Actions Referrals Reception	Reception	All
Persons	Search Details Notes Alerts Consent Referrals Plans Payments Tasks Outcomes Documents Membership	None	All
Groups	Groups Waiting Lists Fulfilment Activity Management	None	All

User Guide 2010

Administrator and Coordinator Access Levels: Continued

Sections Available	Tabs Available	Administrator	Coordinator
Days	Notes Payments Tasks Accommodation	None	All
Reports	Reports Lists Financial Referrals Groups Reception Results	All	All
Admin	Change Password Preferences Finance Merge Users Templates	Change Password Preferences Finance Users Templates	All

Section 3

Coordinator Access Level

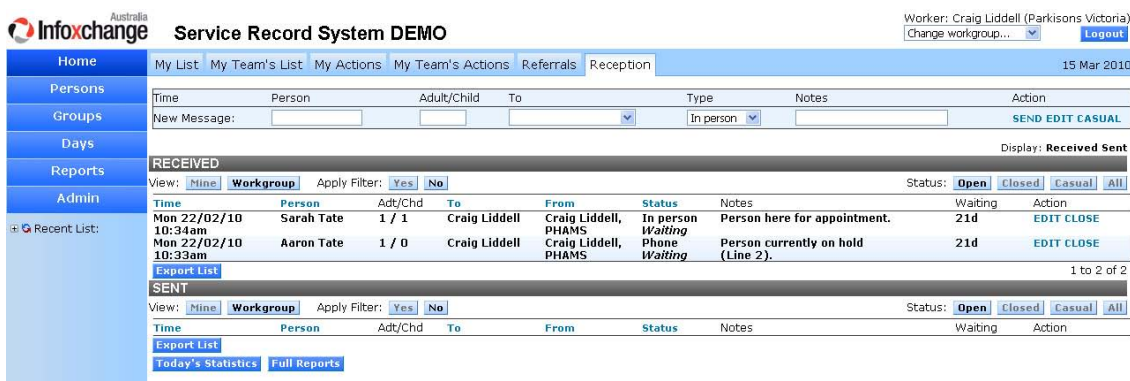
User Guide 2010

3.0 Coordinator Access Level

Coordinator Access allows you to access six Sections: Home, Persons, Groups, Days, Reports, and Admin.

3.1 Home Section

The following tabs are available in the Home Section: My List, My Team's List, My Actions, My Team's Actions, Referrals, and Reception.



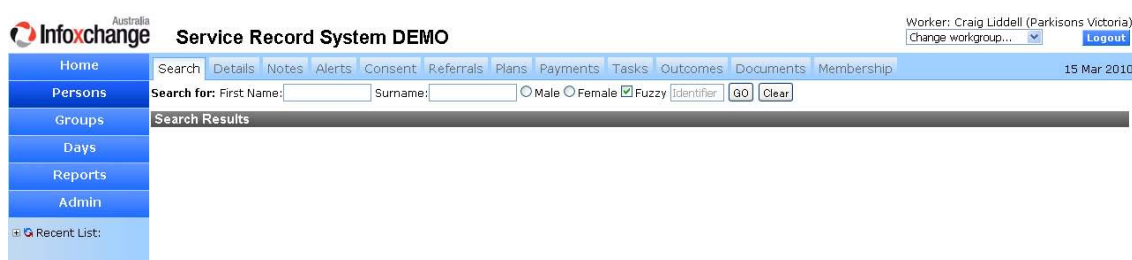
The screenshot shows the 'Service Record System DEMO' interface. At the top right, it indicates the user is 'Craig Liddell (Parkinsons Victoria)' and provides a 'Logout' link. The main navigation bar includes tabs for 'Home', 'Persons', 'Groups', 'Days', 'Reports', and 'Admin'. The 'Home' tab is active, showing sub-tabs for 'My List', 'My Team's List', 'My Actions', 'My Team's Actions', 'Referrals', and 'Reception'. Below the navigation, there is a 'New Message' form with fields for 'Person', 'Adult/Child', 'To', 'Type', and 'Notes', and a 'SEND EDIT CASUAL' button. The main content area is divided into 'RECEIVED' and 'SENT' sections. The 'RECEIVED' section shows a table of messages with columns for Time, Person, Adt/Chd, To, From, Status, Notes, and Action. Two messages are listed: one from Sarah Tate to Craig Liddell (In person) and one from Aaron Tate to Craig Liddell (Phone). The 'SENT' section is currently empty. A 'Recent List' sidebar is visible on the left.

As detailed in the Normal User Guide, the Home Section provides an overview of your actions and those of your team that have been allocated in the Service Record System (SRS). These actions include any tasks recorded in the 'Task' section of an individual's SRS record, any documents that are due to be reviewed, any plans for a review, and any plan actions due. It also includes Alerts and Consent, for example, when such functionality is customised for your Workgroup or organisation.

User Guide 2010

3.2 Persons Section

The Persons Section is used to record information about individuals and families receiving planned support and ongoing casual or crisis assistance. There are a number of tab options under the Persons section.



Functions available in each of the tabs in the Persons Section are detailed in the Normal User Guide.

3.3 Groups Section

In the Groups Section, you can manage and create Groups. There are four key sections: Groups, Waiting Lists, Fulfilment, and Management. Fulfilments include labels and mailing lists, as a couple of examples.



Functions available in each of the tabs in the Groups Section are detailed in the Normal User Guide.

User Guide 2010

3.4 Days Section

The Days Section is used to record information about individuals and families receiving accommodation assistance.



Functions available in each of the tabs in the Days Section are detailed in the Normal User Guide.

3.5 Reports Section

The Reports Section allows you to generate a wide range of reports to assist with organisational management and reporting to stakeholders. There are seven distinct sections: Reports, Lists, Financial, Referrals, Groups, Reception, and Results.

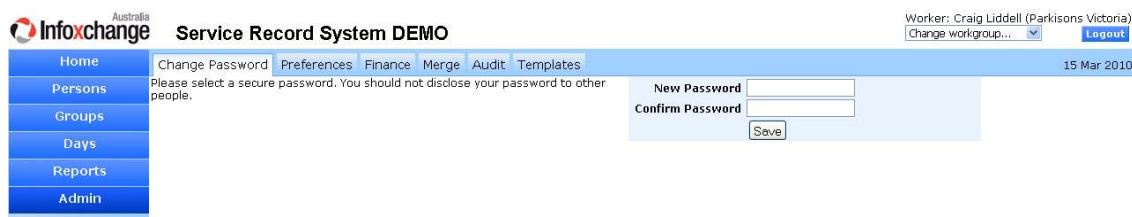


Functions available in each of the tabs in the Persons Section are detailed in the Normal User Guide.

User Guide 2010

3.6 Admin Section

The Admin Section allows you to generate a wide range of reports to assist with organisational management and reporting to stakeholders. There are six distinct sections: Change Password, Preferences, Finance, Merge, Audit, and Template.



Infoxchange Australia Service Record System DEMO Worker: Craig Liddell (Parkisons Victoria)
Change workgroup... Logout

15 Mar 2010

Home | Change Password | Preferences | Finance | Merge | Audit | Templates

Persons: Please select a secure password. You should not disclose your password to other people.

Groups

Days

Reports

Admin

New Password

Confirm Password

Save

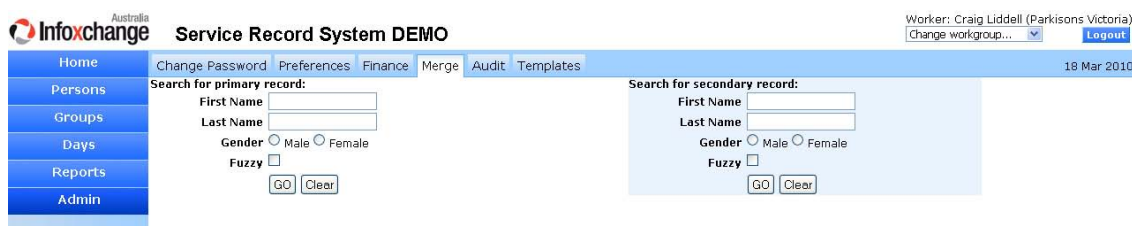
Coordinator Access has two tabs that are not available to any other user: Merge and Audit.

3.6.1 Merge Tab

The Merge Tab enables you to merge duplicate records for the same person. For example, two Workers may have individually entered client details and one record is incorrect. The Merge Tab enables you to combine both the primary and secondary records.

To merge two records:

1. Click the Merge Tab and the following dialog box will appear.



Infoxchange Australia Service Record System DEMO Worker: Craig Liddell (Parkisons Victoria)
Change workgroup... Logout

18 Mar 2010

Home | Change Password | Preferences | Finance | Merge | Audit | Templates

Persons

Groups

Days

Reports

Admin

Search for primary record:

First Name

Last Name

Gender Male Female

Fuzzy

GO Clear

Search for secondary record:

First Name

Last Name

Gender Male Female

Fuzzy

GO Clear

Search for primary record:

First Name

Last Name

Gender Male Female

Fuzzy

GO Clear

Results

First Name	Last Name	Gender	DOB	Alias?	Match	Actions
Marina	Salde	female	02/05/1976		0	Open Select
Marina	Latien	female	02/05/1976		0	Open Select
Marina	Salde	female	02/05/1976	Alias	0	Open Select
Marina	Latien	female	02/05/1976	Alias	0	Open Select

User Guide 2010

3. Open enables you to view the Person record. Click Select once you confirm it is the primary record. The following dialog box will appear.

Primary Record (details kept)			
ID	172	New Search	Go to Client
Name	Marina <i>Tania</i> Salde		
Gender	female		
Date of Birth	02/05/1976		
Indigenous Status	Not Indigenous		
Country of birth	Venezuela		
Language at Home	Spanish		
Comments	Fluent in both Spanish and English.		
Date of Death			
Last update	Craig Liddell, Parkisons Victoria 16/03/2010 09:34:26 EST		
Addresses	Suburb	Type	End Date Primary
4/10 Talbert Drive MALVERN 3144 Home <input checked="" type="checkbox"/>			
Documents (notes, alerts, etc) associated with this record			
No associated documents.			
Alias / Duplicates			
No associated alias or duplicates.			

4. In 'Search for secondary record:', enter the First Name and / or Last Name. Click 'Fuzzy' to enable Service Record System (SRS) to match partial or incorrect spelling. The following dialog box appears.

Search for secondary record:						
First Name	<input type="text" value="Marina"/>					
Last Name	<input type="text"/>					
Gender	<input type="radio"/> Male <input checked="" type="radio"/> Female					
Fuzzy	<input checked="" type="checkbox"/>					
<input type="button" value="GO"/> <input type="button" value="Clear"/>						
Results						
First Name	Last Name	Gender	DOB	Alias?	Match	Actions
Marina	Salde	female	02/05/1976	0	0	Open Select
Marina	Latien	female	02/05/1976	0	0	Open Select
Marina	Salde	female	02/05/1976	Alias	0	Open Select
Marina	Latien	female	02/05/1976	Alias	0	Open Select

User Guide 2010

5. Open enables you to view the Person record.

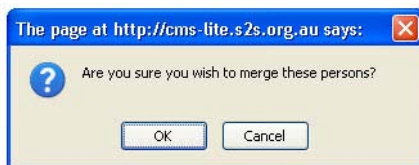
Secondary (Merge) Record					
ID	173				
	New Search Go to Client				
Name	Marina <i>Tania</i> Latien				
Gender	female				
Date of Birth	02/05/1976				
Indigenous Status	Not Indigenous				
Country of birth	Venezuela				
Language at Home	Spanish				
Comments	Fluent in both Spanish and English.				
Date of Death					
Last update	Craig Liddell, Parkisons Victoria 16/03/2010 09:38:00 EST				
Addresses	Suburb	Type	End Date	Primary	
4/10 Talbert Drive MALVERN 3144 Home <input checked="" type="checkbox"/>					
Documents (notes, alerts, etc) associated with this record					
No associated documents.					
Alias / Duplicates					
ID	First Name	Surname	Alias/Duplicate	Last Update	
174	Marina	Salde	Alias	Craig Liddell, Parkisons Victoria	16/03/2010 09:55:11 EST
Merge Notes					
No conflicting profiles					
A person can have only one primary address. The primary status will be removed from the primary address associated with the merge record.					
Make Alias Merge					

User Guide 2010

- Carefully consider both records to ensure they relate to the same client before clicking Merge.

Change Password				Preferences				Finance				Merge				Audit				Templates				29 Apr 2010			
Name		172		Marina <i>Tania</i> Salde				173		Marina <i>Tania</i> Latien				Name		173		Marina <i>Tania</i> Latien									
Gender		female						female				Gender		female													
Date of Birth		02/05/1976						02/05/1976				Date of Birth		02/05/1976													
Indigenous Status		Not Indigenous						Not Indigenous				Indigenous Status		Not Indigenous													
Country of birth		Venezuela						Venezuela				Country of birth		Venezuela													
Language at Home		Spanish						Spanish				Language at Home		Spanish													
Comments		Fluent in both Spanish and English.						Fluent in both Spanish and English.				Comments		Fluent in both Spanish and English.													
Date of Death												Date of Death															
Last update		Craig Liddell, Parkisons Victoria		16/03/2010 09:34:26 EST				Craig Liddell, Parkisons Victoria		16/03/2010 10:08:47 EST				Last update		Craig Liddell, Parkisons Victoria		16/03/2010 10:08:47 EST									
Addresses		Suburb		Type		End Date		Primary				Addresses		Suburb		Type		End Date		Primary							
4/10 Talbert Drive MALVERN 3144		Home		<input checked="" type="checkbox"/>						4/10 Talbert Drive MALVERN 3144		Home		<input type="checkbox"/>													
Documents (notes, alerts, etc) associated with this record																											
No associated documents.																											
Alias / Duplicates																											
ID	First Name	Surname	Alias/Duplicate	Last Update																							
175	Marina	Latien	Duplicate	Craig Liddell, Parkisons Victoria	16/03/2010 10:14:42 EST																						
174	Marina	Salde	Alias	Craig Liddell, Parkisons Victoria	16/03/2010 10:08:47 EST																						
Merge Notes																											
No conflicting profiles																											
<input type="button" value="Make Alias"/> <input type="button" value="Merge"/>																											

- You have the option of either creating the Secondary Record as an Alias of the Primary Record or merging the two records. Click Merge and the following dialog box will appear.



- Click OK or Cancel.

User Guide 2010

The following screen will appear.

Primary Record (details kept)					Person Merge	
ID	172	New Search	Go to Client		New Search	Go to Merged Record
Name	Marina <i>Tania</i> Salde					
Gender	female					
Date of Birth	02/05/1976					
Indigenous Status	Not Indigenous					
Country of birth	Venezuela					
Language at Home	Spanish					
Comments	Fluent in both Spanish and English.					
Date of Death						
Last update	Craig Liddell, Parkisons Victoria 16/03/2010 09:34:26 EST					
Addresses	Suburb	Type	End Date	Primary		
	4/10 Talbert Drive	MALVERN 3144 Home		<input checked="" type="checkbox"/>		
	4/10 Talbert Drive	MALVERN 3144 Home		<input type="checkbox"/>		
Documents (notes, alerts, etc) associated with this record						
No associated documents.						
Alias / Duplicates						
ID	First Name	Surname	Alias/Duplicate	Last Update		
175	Marina	Latien	Alias	Craig Liddell, Parkisons Victoria 16/03/2010 09:56:27 EST	Drop alias	
173	Marina	Latien	Duplicate	Craig Liddell, Parkisons Victoria 16/03/2010 10:08:47 EST	Undo Merge 3 Drop alias	
174	Marina	Salde	Alias	Craig Liddell, Parkisons Victoria 16/03/2010 10:08:47 EST	Undo Merge 3 Drop alias	

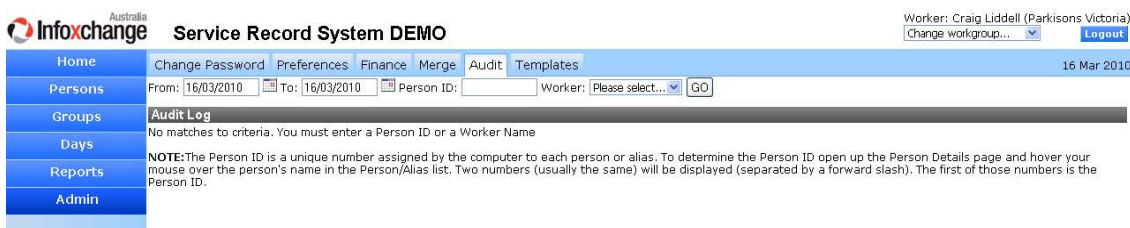
Please note:

- » On the top right hand corner of the screen Service Record System (SRS) has noted that the 'Merge completed successfully'.
- » You will be unable to merge two records that contain Profiles with overlapping dates. In this instance, you can either delete one Profile prior to the merge or alter the dates of the Profile.
- » You also have the option to 'Drop alias', which enables you to delete an alias that has been incorrectly entered or is no longer valid, as a couple of examples.
- » When you merge two records, the demographic information contained in the second record will essentially be deleted. However, you do have the option of identifying the second record as an Alias to the primary record by clicking 'Make Alias' at the bottom of the Secondary Record.
- » You also have the option to 'Undo Merge'. Even when you go to another Section of SRS, you can return to the Merge Tab, search for a Person record that has previously been merged, and undo.

User Guide 2010

3.6.2 Audit

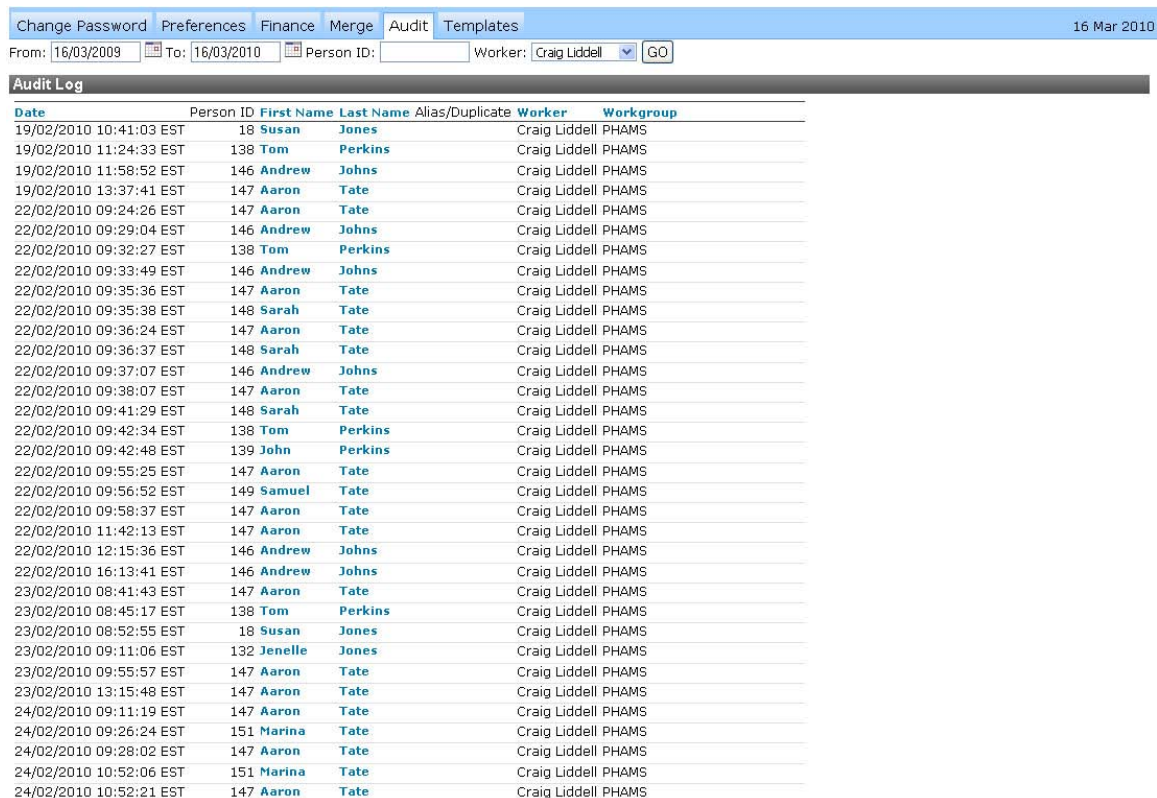
The Audit Tab enables you to review the activities of individual Workers or clients over a period of time.



The screenshot shows the Infoxchange Australia Service Record System DEMO interface. The top navigation bar includes Home, Change Password, Preferences, Finance, Merge, Audit (selected), and Templates. The date is 16 Mar 2010. Below the navigation bar, there are search filters for From (16/03/2010), To (16/03/2010), Person ID, and Worker (Please select...). A GO button is present. The main content area shows an Audit Log with a message: "No matches to criteria. You must enter a Person ID or a Worker Name". A note below explains that the Person ID is a unique number assigned to each person or alias.

To undertake an Audit:

1. Select the date range by using the calendar icons.
2. Select the Worker by using the blue pull down menu.
3. Click GO. The following screen will appear.



The screenshot shows the Infoxchange Australia Service Record System DEMO interface with the Audit tab selected. The search filters are From: 16/03/2009, To: 16/03/2010, Person ID, and Worker: Craig Liddell. A GO button is present. The main content area shows an Audit Log table with the following data:

Date	Person ID	First Name	Last Name	Alias/Duplicate	Worker	Workgroup
19/02/2010 10:41:03 EST	18	Susan	Jones		Craig Liddell	PHAMS
19/02/2010 11:24:33 EST	138	Tom	Perkins		Craig Liddell	PHAMS
19/02/2010 11:58:52 EST	146	Andrew	Johns		Craig Liddell	PHAMS
19/02/2010 13:37:41 EST	147	Aaron	Tate		Craig Liddell	PHAMS
22/02/2010 09:24:26 EST	147	Aaron	Tate		Craig Liddell	PHAMS
22/02/2010 09:29:04 EST	146	Andrew	Johns		Craig Liddell	PHAMS
22/02/2010 09:32:27 EST	138	Tom	Perkins		Craig Liddell	PHAMS
22/02/2010 09:33:49 EST	146	Andrew	Johns		Craig Liddell	PHAMS
22/02/2010 09:35:36 EST	147	Aaron	Tate		Craig Liddell	PHAMS
22/02/2010 09:35:38 EST	148	Sarah	Tate		Craig Liddell	PHAMS
22/02/2010 09:36:24 EST	147	Aaron	Tate		Craig Liddell	PHAMS
22/02/2010 09:36:37 EST	148	Sarah	Tate		Craig Liddell	PHAMS
22/02/2010 09:37:07 EST	146	Andrew	Johns		Craig Liddell	PHAMS
22/02/2010 09:38:07 EST	147	Aaron	Tate		Craig Liddell	PHAMS
22/02/2010 09:41:29 EST	148	Sarah	Tate		Craig Liddell	PHAMS
22/02/2010 09:42:34 EST	138	Tom	Perkins		Craig Liddell	PHAMS
22/02/2010 09:42:48 EST	139	John	Perkins		Craig Liddell	PHAMS
22/02/2010 09:55:25 EST	147	Aaron	Tate		Craig Liddell	PHAMS
22/02/2010 09:56:52 EST	149	Samuel	Tate		Craig Liddell	PHAMS
22/02/2010 09:58:37 EST	147	Aaron	Tate		Craig Liddell	PHAMS
22/02/2010 11:42:13 EST	147	Aaron	Tate		Craig Liddell	PHAMS
22/02/2010 12:15:36 EST	146	Andrew	Johns		Craig Liddell	PHAMS
22/02/2010 16:13:41 EST	146	Andrew	Johns		Craig Liddell	PHAMS
23/02/2010 08:41:43 EST	147	Aaron	Tate		Craig Liddell	PHAMS
23/02/2010 08:45:17 EST	138	Tom	Perkins		Craig Liddell	PHAMS
23/02/2010 08:52:55 EST	18	Susan	Jones		Craig Liddell	PHAMS
23/02/2010 09:11:06 EST	132	Jenelle	Jones		Craig Liddell	PHAMS
23/02/2010 09:55:57 EST	147	Aaron	Tate		Craig Liddell	PHAMS
23/02/2010 13:15:48 EST	147	Aaron	Tate		Craig Liddell	PHAMS
24/02/2010 09:11:19 EST	147	Aaron	Tate		Craig Liddell	PHAMS
24/02/2010 09:26:24 EST	151	Marina	Tate		Craig Liddell	PHAMS
24/02/2010 09:28:02 EST	147	Aaron	Tate		Craig Liddell	PHAMS
24/02/2010 10:52:06 EST	151	Marina	Tate		Craig Liddell	PHAMS
24/02/2010 10:52:21 EST	147	Aaron	Tate		Craig Liddell	PHAMS

User Guide 2010

- » Clicking on either the First Name or Last Name of a Person will take you to his or her record.
- » You can filter the list by clicking on the headings at the top of the screen. Options include: Date, First Name, Last Name, Worker, or Workgroup.
- » Should you wish to audit an individual client, you can locate the 'Person ID' in the Person record by hovering the mouse over the name in the Person Section and Details Tab. The first number that appears is be the Primary Name Person ID and the second number is the Alias Person ID, where an alias exists.

Home	Search	Details	Notes	Alerts	Consent	Referrals	Plans
Persons	Person / Alias:						Create new alias
Groups	Marina Salde	←	Primary Name				
Days	Relationships:						Create new relationship
Reports	No relationship exists						
Admin	Profiles:						Create new profile
	No profiles exist						