



Using the Record Summary

The Record Summary

Record summaries are the basic unit of data storage in HQ™, Team™ and Relate™. Summaries designed for HQ™ contain somewhat different forms (Certifications, Employment Information, Assessments, Medical Information, Performance Review, Prognosis, etc.) than summaries in Team™ or Relate™, however, the principles underlying the creation and use of summaries remains the same for all BlueStep™ products.

Four areas will always appear on summary screens (assuming you have been granted correct permissions), the header (including titles, navigation, etc.), the recent records listing, the record navigation menu and the main summary section.

Header

The header remains the same no matter what screens in HQ™ you are viewing, with the exception of adaptations made in the navigation bars to facilitate using the pages and sub-pages. While on the Record Summary, the navigation is set to the options for the Staff Manager, the Client Manager or the Relationship Manager, depending upon the type of record selected.

Record Summary Section

Each of the forms associated with the type of record you are viewing will have selected summary fields displayed in the two columns in this section. To view full information on each form, click the form name in the record navigation menu or the section title in the summary area. In most cases, depending upon your permissions, you will be able to edit this information.

Recent Records

Below the record navigation menu is a list that can contain up to eight (8) shortcut links to the recent records with which you have worked. These are automatically saved in the list as you visit each one, with the most recently visited appearing at the top.

Record Navigation Menu

The record navigation menu changes according to the type of record being viewed. Staff records, for instance, use a variety of forms to gather and store staff-specific information. These vary from the forms used to collect client information, worker information, etc. Each form appropriate for the



type of record being viewed is listed separately, by title, on the menu. These are clickable links to pages displaying all fields contained in the original form. As above, depending upon your permissions, you may be able to edit the fields contained in each form. The lower half of the menu allows you to perform certain functions with the entire record.

Relationships

The Relationships link is used to establish a relationship between the record you are viewing and any other staff member, inquiry, client, responsible party, care partner or non-care partner within the HQ™ system. This allows you to know who is responsible for any issues, who is affected by changes or who to contact, etc. concerning the individual shown on the record.

A **Primary Relationship** is defined as an individual or organization over whom the person named on this record has responsibility. A **Secondary Relationship** is defined as an individual or organization that has responsibility over the person named on this record.

To create a new relationship, click on either the New Primary Relationship or New Secondary Relationship button. On the resulting screen, click on one of the underlined category links in Related Person. This will produce a pop-up displaying all the possible record choices for that category. Select a record.

The screen will repaint and replace the underlined categories with the name of the selected individual. Click on the Relationship Type drop-down and select one of the possible titles. Click the Save button. The new relationship will be added to the Relationships page for this record and will also be displayed on any relationship trees that include this record and/or the related person.

Change Record Categories

If a record in the HQ™ system needs to be moved from one category to another, the Change Record Category link will allow the move without duplication of effort or loss of information. For instance, if you have a User who becomes a Client, you will not need to reenter the record data, you can simply change it to be included in the Client category.

To do this, click the Change Record Category link. The resulting screen will show all categories that the present record is in and the data collection forms within those categories. Click the Add Category link to see a drop-down of all available categories to which you may add this record.

Click on the appropriate category name. If there are fields of required information for the selected category (which have not been filled out for this individual) the forms containing those fields will be presented for you to complete. (If there are additional forms, but none of the fields are required to meet the category provisions, the record summary will appear.) Click the Save button when done with any additional forms and you will be returned to the record summary.

If you click the Change Record Category link again, you will see that the new category has been added to the screen. If there is reason to delete the previous category, such as a Client is no longer an Inquiry, click the Remove button associated with the unneeded category. The record summary will reappear and the named individual will have been deleted from the unwanted category. You may always check an individual's category by clicking this link and viewing the listed category.

Change Unit

Change Unit allows you to move a record from one unit to another (this may be an office, department, chapter, branch, subsidiary, etc., depending upon how your organization is structured) without reentering the data or loss of information.

To do this, click the Change Unit link. The resulting screen displays the record name, the current unit and presents a drop-down listing all available units in your organization. Click on the new unit name, then the Save button. You may always check an individual's unit by clicking this link and viewing the listed unit.

Remove User Account

You may delete the user account of any record, thus denying login without deleting other stored information on the individual named in the record. This is useful whenever you must retain data on an individual or organization, but they no longer should have access to your system, such as in the case of a former employee.

To do this, click on the Remove User Account link. The resulting screen displays the account name. If it is correct, click the Delete button. A pop-up verifier will appear prompting you to reconsider this decision, as it will block access to the system. If you are sure you want to proceed, click the OK button.

In certain instances, you may receive the red text message "**This user account cannot be removed, because it is in use in other parts of the system.**" If that message appears, a list of User Groups appears below the text. Click on each of the underlined group names one at a time. Each link will take you to a User Group, where you can delete the individual's membership in the group, using the delete icon. When all memberships have been deleted, you may return to this record summary and proceed with removing the user account, as described above.

Delete Record

It may become necessary to entirely remove a record and all of its associated information from the system, such as when duplicate records appear. To do this, click on the Delete Record link.

On the resulting screen, please take note of the red warning message "**Caution: Deleting this record is permanent.**" If you proceed and delete this record it will be permanently and irrevocably gone from the system. There is no way to undo the delete. If you find you do need the record after having deleted it, the only option is to recreate the record from the beginning again. If you are certain you want to proceed with deletion, click the OK button on the pop-up verifier.

In some cases, you may receive the red text message "**This record cannot be deleted, because it is in use in other parts of the system.**" If that message appears, a list of User Groups appears below the text. Click on each of the underlined group names, one at a time. Each link will take you to a User Group, where you can delete the individual's membership in the group, using the delete icon. When all memberships have been deleted, you may return to this record summary and proceed with removing the record, as described above.