



HQ™ Quick Guide

My Office

My Office is designed to gather together in one convenient place all the elements of the HQ™ system that apply directly and specifically to you, and with which you will be working on a regular basis. Click on the My Office link on the main navigation bar and the My Office page appears. Click on titles within the record navigation menu to the left or on any of the section title on the screen for access to the pages summarized on the My Office screen.

Relationships

Your relationships are shown as a list of individuals on the My Office screen. These are people over whom you have responsibility or who have responsibility over you.

Viewing Relationships

- Click the Relationships title in the record navigation menu (on the left) **or**
- Click the Relationships section header **or**
- Click the underlined numbers to the right of the section header **or**
- Click the underlined name of the individual in the section or on the relationship tree

Inbox

Inbox allows easy access to standard e-mail and to your secure IntraMail accounts – those accounts that operate internally within your organization and send to/receive from other members of your organization. It functions similarly to standard e-mail sent through Outlook™, Eudora™ or other e-mail services, but is secured with encryption and does not pass from our server to any external (unsecured) servers.

Viewing E-mail

- Click the Inbox title in the record navigation menu (on the left) **or**
- Click the Inbox section header **or**
- Click the underlined numbers to the right of the section header

Composing Secure IntraMail

- Click the Compose Secure IntraMail button



- Enter recipients secure e-mail address (also CC and BCC, if desired)
- Type in a subject
- Click the Regarding link and select an individual
- If attachments are needed, click the attachment link and browse to select file
- Type body of message
- Click Send, Save As Draft or Cancel

Tasks

Any tasks that you have been assigned, either to yourself as a reminder or by others in the organization, will appear listed on the My Office screen and also the Tasks screen, where the full list is stored.

Viewing Tasks

- Click the Task title in the record navigation menu (at the left) **or**
- Click the Task section header **or**
- Click the underlined numbers to the right of the section header **or**
- Click the underlined name of the specific Task

Schedule

The Schedule section gives a snapshot view of those events slated for the current day. By clicking on the Schedule title, the entire day is presented in planner format.

Viewing Today's Schedule

- Click the Schedule title in the record navigation menu (to the left) **or**
- Click the Schedule section header **or**
- Click the underlined numbers to the right of the section header **or**
- Click the underlined title of the event

Editing Events

- Select an event
- Click the edit icon and make desired changes or the delete icon to remove
- When done, click the Save button

Setting Calendar Preferences

- Click the Calendar Preferences button
- Select your time zone from the drop-down
- Set the Opening View from the drop-down (resets only Office Manager, **not** My Office)
- Select start and end time for Typical Work Day from drop-downs
- Select preferred intervals from drop-down
- Click the Save button

Adding a New Event

- Click the New Event button
- Enter a title and location
- Select a type from the drop-down
- Enter any event details
- Enter the start date/time, end date/time and time zone
- If event is repeating, select the appropriate listing from the drop-down
- If event recurrence ends, enter and end date
- Add attendees, if desired



- Click the Save button

Adding Attendees

- Click New Event button and create an event or select an existing event using the edit icon
- Click the Attendees tab
- Click the New Attendee button
- Select a category of individuals from the Source drop-down
- Click on the desired name
- Select a status from the Status drop-down
- Click the Save button when done adding all attendees

Issues

Any issues that you have been assigned, either to yourself as a reminder or by other in the organization, will appear listed on the My Office screen and also the Issues screen, where the full list is stored.

Viewing Issues

- Click the Issues title in the record navigation menu (to the left) **or**
- Click the Issues section header **or**
- Click the underlined numbers to the right of the section header **or**
- Click the underlined name of the specific issue

My Profile

Available in the navigation menu to the left and on the dashboard is the My Profile link. This is a valuable resource for keeping your online profile and personal information up-to-date.

Editing or Adding My Profile Information

- Click the My Profile link
- To edit your name, address, e-mail address or contact information, click Personal Information
- To edit your password, password hint or subscription preferences, click Online Profile
- To edit your contact information, click Personal Contact
- Make changes or additions, as needed
- Click the Save button

Recent Records

Below the My Office links is a section 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 as you work with the records. To access one of these records, click on the link.

Total Operations Management



The Total Operations Management serves as a place to set up and control some of the most basic operational functions for the entire organization, including the creation and maintenance of Departments, Processes, Active Tasks and Groups

Creating a Department

- Click the New Department button
- Enter a department name
- Enter a description
- Add department members
- Click the Save button when done

Adding Members to a Department

- Click the edit icon opposite the name of the desired group
- Click the Add Member button
- Select a category of individuals from the Source drop-down
- Click an underlined name from the resulting relationships tree
- Repeat for any additional members
- Click Save when done

Processes

Every organization has processes they follow in order to conduct business or to operate in the day-to-day world. The HQ™ Processes function creates an avenue for management to purchase custom programming structures that formalize and solidify those processes. This ensures that goals are met, solutions to problems are implemented and those assigned to the tasks are not only reminded of the job at hand but accountable for its completion.

Active Tasks

Active Tasks allows any user within the system (provided they have the proper permissions) to create tasks and sub-tasks that will lead to smooth functioning of the organization. You may assign tasks to yourself as a reminder or to others in your organization, as needed.

Creating an Active Task

- Click New Task button
- Enter a name, sub-task of (if appropriate), due date, priority, assigned to, assigned by and any notes that are needed.
- Check any applicable non-compliance notifications
- Click the Save button

Updating an Active Task

- On the Active Tasks screen, click the edit icon opposite the task
- Make any needed changes to Task Info
- If no other changes needed, click the Save and Close button
- To change a task status, click the Task Status tab
- Click Update Task Status button and select a new status from the status drop-down
- If no other changes needed, click the Save and Close button
- To add an attachment to the task, click the Attachment tab
- Click the Add Attachments button (you may then click the Add Multiple Files button)
- Browse for the correct file, click on it when located
- Type in a new description, if desired
- Enable version control, if desired (only available if this option has been purchased)
- Click the Upload button



- If no other changes needed, click the Save and Close button
- To change permissions level for this task, click on the permissions tab
- Edit permissions as desired using the radio buttons and/or Add User or Add Group buttons
- If all updating is complete, click the Save and Close button

Groups

Clients may be organized into groups to facilitate management, staff communication and data storage. Groups also permit you to add Group Notes – a single note that is appended to the record of each member of the group.

Creating a New Group

- Click the new Group button
- Enter a name for the group
- Type in a group description or identifier
- Add members to the group
- Click the Save button when done

Adding Members to a Group

- Click the edit icon opposite the name of the group
- Click the Add Member button
- Select a category of individuals from the Source drop-down
- Click an underlined name from the resulting relationships tree
- Repeat for any additional members
- Click Save when done

Staff/Inquiry/Relationship Managers

The Staff Manager serves as a single, centralized place to store and track all data associated with your full-time and part-time employees. While forms and fields for data storage may be added and customized to fit your specific needs, the staff default allows for the recording of many types of information.

The Marketing/Inquiry Manager is designed to track and store information about prospective clients, their statuses, general and specific marketing activities, staff relationships with prospective customers and to provide a launching pad for future marketing strategies and individual marketing/sales tasks.

The Relationship Manager module is designed to record and track all information on those entities with whom your organization has a business relationship. For security and to meet privacy requirements, these relationships have been divided into three categories, Responsible Parties, Care Partners and Non-Care Partners

Adding New Staff/Inquiries/Responsible Parties/Care Partners or Non-Care Partners

- Click the Add New link on the home page or the secondary navigation bar
- Enter required and optional data, clicking the Next button after each
- Click the Save button

Searching for Staff/Inquiries/Responsible Parties, Care Partners or Non-Care Partners Records

- Click the Select link on the home page or on the secondary navigation bar



- Choose a Search By criterion from the first drop-down
- Select a criterion from the second drop-down
- In Search For enter a name, partial name or number (depending upon the Search By choice)
- Click the Search button

Editing Staff/Inquiries/Responsible Parties/Care Partners or Non-Care Partners Records

- Perform a Search, as described above
- Click the Select opposite the desired record
- Locate the section that contains the information you desire to edit and click the section title or the form title on the record navigation menu
- Scroll to the correct field and type in any changes
- Click the Save button

Adding a Relationship

- Click the Relationship link in the record navigation menu
- Select either the New Primary Relationship or New Secondary Relationship button
- Click on the appropriate underlined category link
- Select a name from the category list
- When the screen repaints, select a relationship type from the drop-down
- Click the Save button

Changing Record Categories

- Click the Change Record Category link on the record navigation menu
- Click the Add Category link and select category from drop-down
- Fill out any required forms that are presented and click the Save button for each page
- Click Change Record Category link again
- Click the Remove button for any categories that need to be removed

Changing an Inquiry into a Client

- Perform a Search as described above
- Click the Select link opposite the desired record
- Click the Change Record Category link on the record navigation menu
- Click the All Category button and select the Client category
- Click the Change Record Category link again
- Click the Remove button opposite the Inquiry category

Changing Units

- Click the Change Unit link on the record navigation menu
- Click on the new unit name in the Move To box
- Click the Save button

Removing User Accounts

- Click on Remove User Account link in the record navigation menu
- Click the Delete button
- If you are sure you want to proceed, click the OK button

Deleting Records

- Click on the Delete Record link on the record navigation menu
- Take note of the red warning message **“Caution: Deleting this record is permanent.”**
- If you are sure you want to proceed, click the OK button

Quality Control Manager



Under the Quality Control Manager, problem areas can be identified, qualified and quantified, then assigned to the appropriate individual. Each assignee receives instant notification of the issue assignment and all the associated documentation. Documenting client or organizational issues provides the basis for creating tasks, promoting accountability and facilitating solutions. Further, an up-to-date, accurate history of past problems creates a foundation for solving today's problems and preventing their reoccurrence tomorrow.

Adding a New Issue

- Click the New Issue button
- Fill in a name, description, an assignee, a who about person, a type, a status and a priority
- Click the Save button

Search for an Issue

- Choose one or more search criteria from the drop-downs or type in an issue name
- Click the Search button
- Those issues that most closely match your search criteria will appear in the lower section of the screen, replacing the full issues list

Making an Issue Assignment

- Enter a new issue or select an existing issue using the edit icon
- On the New Issue (or Edit Issue) screen, click the [Select Assigned To](#) link
- On the resulting pop-up window, click the [Select](#) link
- Click the Save button
- The selected individual will appear in the Assigned To field and the issue, including details, will appear on the individual's My Office list.

Service Manager

The HQ™ Service Manager identifies client needs, helps establish a program to fulfill their needs, tracks client progress and maintains service histories and reports. One of the core features is ability to construct individualized Service Plans for each client using the fully customizable Service Libraries. Additionally, psychologists, psychiatrists and therapists will recognize and immediately be familiar with the layout, terms and definitions used in the standard industry treatment planner, which can be added to any organization's HQ™ and dovetail seamlessly into record summaries and individual service plans.

Searching for Client Service Records

- Click Select Client link under Service Manager on home page or on secondary navigation bar
- Choose a Search By criterion from the first drop-down
- Select a criterion from the second drop-down
- In Search For, enter a name, partial name or number (depending on Search By choice)
- Click the Search button

Editing Client Service Records

- Perform a Search, as described above
- Click the Select link opposite the desired record
- Locate the section that contains the information you desire to edit and click the section title or the form title on the record navigation menu
- Scroll to the correct field and type in any changes
- Click the Save button



- Select any other sections and fields to edit, saving each time

Creating a Service Plan Library

- Click New Service Plan Type button
- Enter plan **structural** names in six (6) fields on the resulting screen
- Click [View](#) link under Plan Library
- Add all the problems to the library using the [New Problem](#) link
- Add all the definitions to the library using the [New Behavioral Definition](#) link
- Add all the goals to the library using the [New Long-Term Goals](#) link
- Add all the objectives to the library using the [New Short-Term Objectives](#) link
- Add all the interventions to the library using the [New Therapeutic Interventions](#) link
- Return to the objectives and edit each to add the therapeutic interventions
- Click the Diagnosis Library link and add all applicable Axes I to IV diagnoses
- Click the Modalities Library link and add all applicable Modalities and their codes
- Click the Assessments Library link and add all applicable Assessments
- Return to the assessments categories and edit each by adding a New Instrument
- Click the Service Item Library link and add all applicable Service Items
- Click the Discharge Library link and add all applicable Discharge Criteria
- Click the Save button when done

Adding a Service Plan to a Client

- Click Service Plan link on record navigation menu or Service Plan on the section title
- Select a plan using the edit icon
- Click on the [Behavioral Definitions](#) link and select or create definitions
- Click on the [Long-Term Goals](#) link and select or create goals
- Click on the [Short-Term Objectives](#) link and select or create objectives
- Edit each Short-Term Objective and add the interventions
- Click the Diagnosis link
- Click the New Axis I button and select or create Axis I diagnoses
- Click the New Axis II button and select or create Axis II diagnoses
- Click the New Axis III button and select or create Axis III diagnoses
- Click the New Axis IV button and select or create Axis IV diagnoses
- Under Axis V, review the prior level, enter a current level and select a stress severity level
- Click the Save button when done
- Click the Assessment button
- Click the New History Note button and add any notes desired
- Click Save when note is complete
- Add any Strengths and Weaknesses notes
- Click the New Assessment button
- Select at least Categories, Assessment Instruments, Source and Treatment Phase
- Click Save when done
- Click the Save button when the Assessments page is completed
- Click the Techniques button
- Click the New Modality button select a modality and enter the CPT code
- Select a frequency and a provider
- Click the Save button, then the New Level of Care button
- Select a level of care and any appropriate modifiers
- Click the Save button, then the New Approach button
- Select an approach, then click the Save button
- When done with the Techniques screen, click the Save button
- Click the Prognosis button
- Select at least a Prognosis Rating and enter an Objectives Achieved percentage
- Click then Save button when done



- Click the Discharge button
- Select Competencies, Care, Recommendations and Plans
- Enter a data and any summary notes desired
- Click the Save button when completed

Completing and Signing a Service Plan

- Click the edit icon under Review/Sign
- Click the [Printer Friendly Version](#) link
- Read and sign the printed version, file as directed by your organization
- Click the [Add a Signature on File](#) link
- Enter your name, the date and the number of the client's file

Office Manager

Using the Office Manager, calendar items and file information are both easily available to users from a single, consolidated point. Further, the Office Manager keeps these elements organized and up-to-date, secure and accessible, comprehensive and specific, by using flexible, customizable folders and layouts.

Adding New Events

- Click the New Event button
- Enter a title and location. Select a type from the drop-down, Enter any event details, start date/time, end date/time and time zone or repeating data.
- Click the Save button
- To add attendees, see below

Adding Attendees

- Click New Event button and create an event or select an existing event using the edit icon
- Click the Attendees tab
- Click the New Attendee button
- Select a category of individuals from the Source drop-down
- Click on the desired name
- Select a status from the Status drop-down
- Click the Save button when done adding all attendees

Adding New Files

- Click the Add File button
- Click the Browse button
- Navigate to the file you wish to add, click on its name
- Type a new description, if desired
- Select a destination from the drop-down
- Enable Version Control, if desired (only available if this product purchased)
- Click the Upload button

Reordering Files or Folders

- Click the Reorder File or Reorder Folder button
- Highlight the selected file or folder
- Click the movement function keys as needed

- Click the Save button

Enabling and Using Document Versioning (Only available if your organization has purchased this option)

- From the Shared Files screen, click the Add File button or select an existing file from the list using the version or edit icon
- Check the Enable Version Control box
- Click Upload if this is a new file or click Save if this is an existing file
- Click on the underlined name of the desired file
- Save to your computer
- Make any edits necessary, then save the document on your computer
- Navigate to the Shared Files screen
- Click the edit icon for the document you are working with
- Click the Browse button
- Select the edited file, then click Upload

Security Manager

The Security Manager area contains functions that are not visible to every user, but play a crucial role in customizing and securing your HQ™ application. Through Styles, you may set titles, logos and icons. Through HQ Administrators, you may share this critical access or reassign it entirely by entrusting administrator privileges to others within your organization. Through Media Library, you may select images, audio and video clips to store on your library for use throughout HQ™.

Adding Titles and Logos

- Click Styles on the drop-down
- Click the Custom radio button
- Paste the chosen logo into the editor box **or**
- Click the picture icon to select graphic from the Media Library
- Type any title text
- Using the editor box header, make font and text changes as needed
- Alternately, you may add a graphic with the Logo field
- Click the Save button

Adding/Deleting HQ Administrators

- Click HQ Administrators on drop-down
- Click the Add User button
- Click Select next to the name you wish to add
- Add as many administrators as desired
- Click the delete icon opposite any name(s) you wish to remove
- Click the Save button

Uploading Images to the Media Library

- Click Media Library on the drop-down
- Click the Add Files button
- If you have more than one image to add, click the Add Multiple Files button
- Click the Browse button and navigate to the file you wish to upload
- If the file is under 20MB, click on the file name
- Click the Upload button and be patient if it is a large file

Administrative Options

There are several important options and valuable operations that are available to HQ™ administrators. If you have the correct permissions and licenses, these options and operations are accessible through an Edit Page button that will appear at the upper right of various screens throughout the system.

Editing a Page - General Information

- Click the Edit Page button
- Make any needed changes to the page title
- If you wish to hide the page, check the “Do not show in site navigation” box
- Change page location, if desired
- Type in any text you wish to have appear at the top of the page
- Click the Save button when done

Editing a Page - Styles

- Click the Edit Page button
- Select the Styles tab
- Select the default setting (Inherited) or customize the page (Custom)
- Type in any text you wish to have appear at the top of the page
- If a logo is desired and you have not entered it in the editor box, select one from the Media Library
- Click the Save button when done

Editing a Page - Permissions

- Click the Edit Page button
- Select the Permissions tab
- Select any of the permissions levels for the groups/individuals listed
- Click the Save button when done

Adding Permissions Groups

- Click the Add Group button
- Select a group from the security groups listed
- Select any of the permissions levels for the newly added group
- Click Save when done

Adding Permissions Users

- Click the Add User button
- Select an individual from the All Users screen
- Select any of the permissions levels for the newly added user
- Click Save when done

Editing a Page – Shared Files Views

- Click the Edit Page button
- Select List or Icon from the View Type drop-down
- Check or uncheck Show Posted By
- Click Save when done