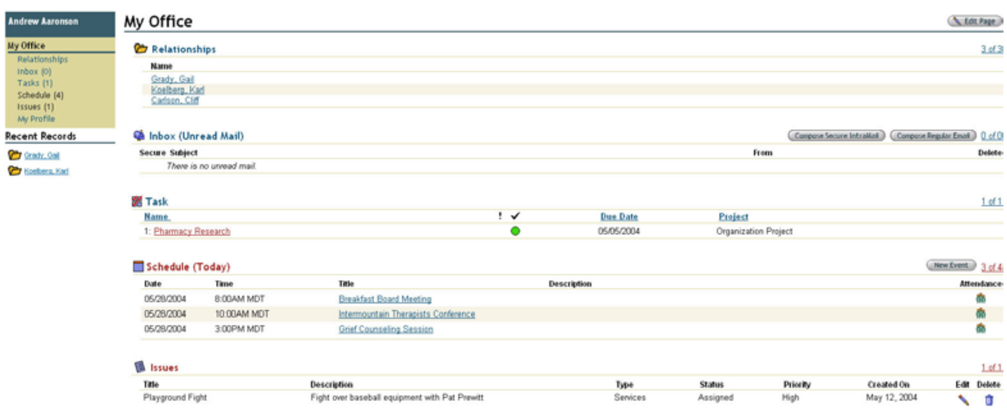
HQ™ Basics

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 titles within the record navigation menu to the left or on any of the section titles 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.

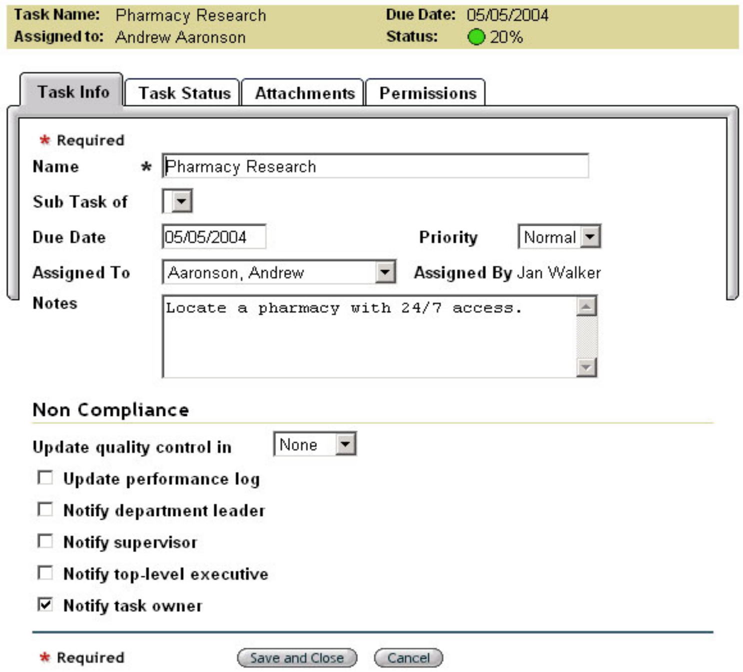
The list displays the top three (3) names from your entire relationship tree. Clicking on their individual names brings up the Record Summary page for that person (if you have been granted permissions for this access). Clicking on the relationship title or the numbers to the right of the section displays the hierarchical tree of relationships in which you have a place. Clicking on the individual names will retrieve the Record Summary for that person.

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. Just as with other e-mail clients, IntraMail can have multiple accounts and folders and be customized to suit your working preferences. The Inbox link also lets you compose, send, receive and store standard e-mails to and from external, non-secure sources to recipients either inside or outside of your organization.

Tasks

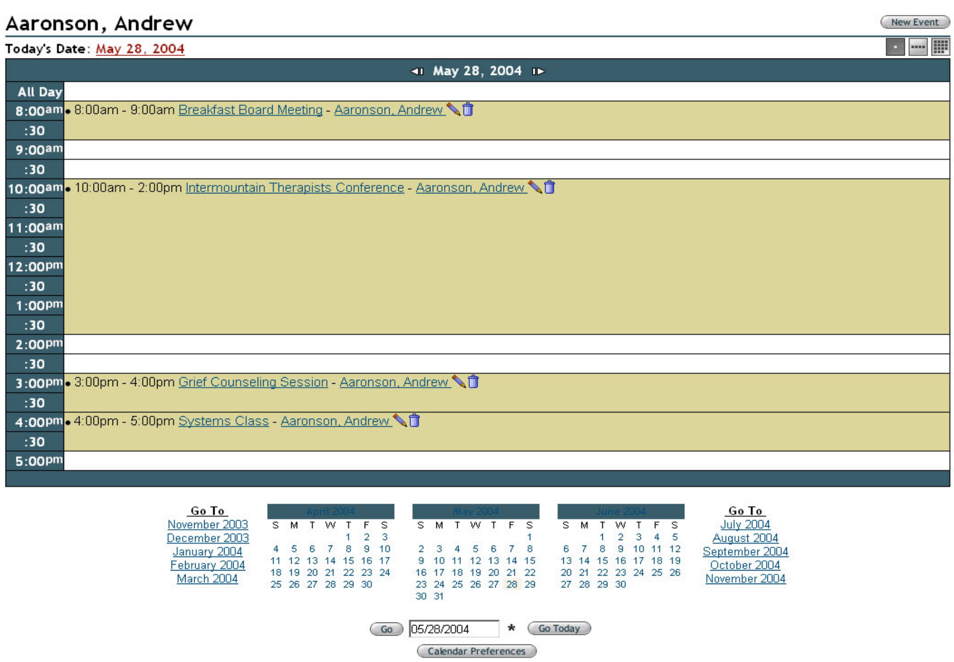
Any tasks that you have been assigned, either to yourself as a reminder or by others in the organization, will appear listed on My Office screen and also the Tasks screen, where the full list is stored. For more information on each of the tasks, click the underlined task name. Doing so will take you to a pop-up of the original screen on which the task was created, as seen below.



You may make changes to this screen and the associated screens from this pop-up. However, if you need to initiate a new task, that is done under the Total Operations Manager.

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.



Calendar Navigation
To view the details on any calendar item, click on its underlined name. A summary giving the Event Time, Location, Event Type, and full Event Details will be presented. Selecting the edit icon returns the original data entry page, where you may make any changes needed. Clicking the delete icon removes this event from the calendar. A list of attendees for each event is also displayed in this view. To see the full list of attendees, including their Attendee Statuses for this event, click on an underlined attendee name.

The date displayed in the dark bar at the top of the schedule identifies the date to which the schedule applies (it defaults to the present day). On either side of the date are arrows allowing quick navigation to previous and future days. The Today's Date link returns you to the present day, if you are currently displaying a past or future schedule.

Using Calendar Preferences
The Calendar Preferences button Calendar Preferences opens a screen with options to set display variables for your My Office schedule and the calendar view in Office Manager.

Time Zone
For events to record accurately for your location, it is important to set the Time Zone field. When set properly, events that are scheduled in other time zones, will auto-correct for time differences when seen on your schedule.

Calendar Opening View
The Calendar view seen in Office Manager is set in this field. Please note that it does **not** reset the schedule view as seen on the My Office Schedule (Today) or the screen that is accessed from the Schedule link. Month, Week and Day Views are available.

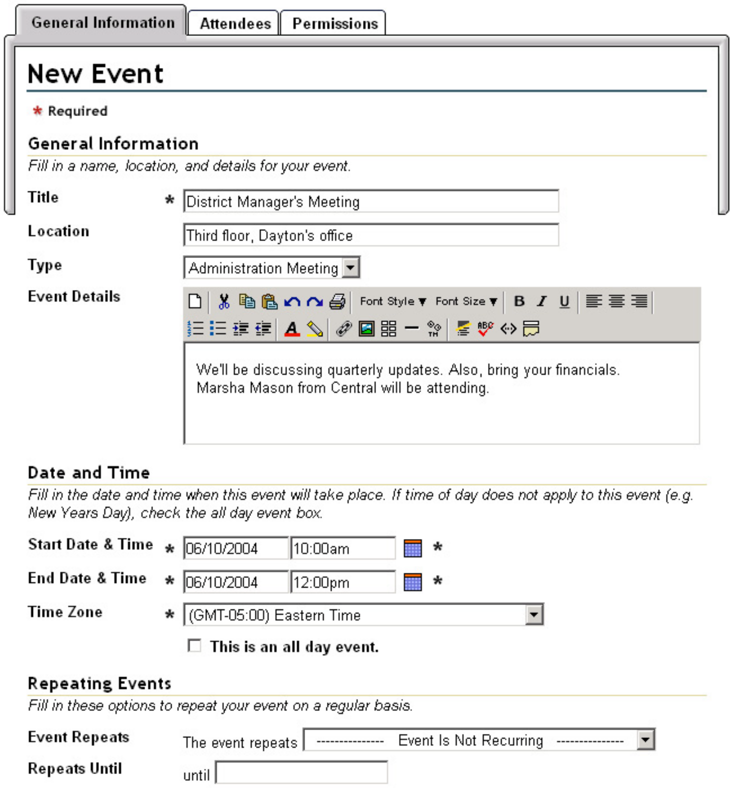
Typical Work Day
This field lets you customize the span of hours that will be shown on the daily schedule. The span selected for the sample schedule page seen above is 8 AM to 5 PM.

Interval on Day View
You may set the time intervals displayed during the day with this field. The schedule may be divided into 10, 15, 20 or 30 minute periods or into one-hour intervals. The interval selected for the sample schedule page seen above is 30 minutes.

Adding New Events
To add a new event to the calendar, click the New Event button. Under General Information, choose a title for your event, type in its location and select a type from the list previously created. The editor box is a place where you can enter all details pertinent to the event.

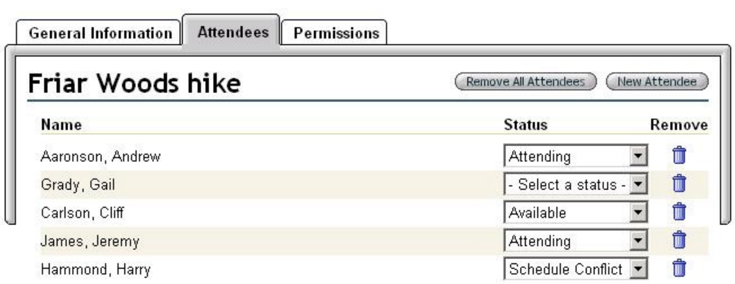
Under Date and Time, enter the start and end dates and the time for each, then check to be sure the time zone field is correct for your time zone, so that events will record accurately on organization-wide calendars. There is also a box to indicate that an event lasts for a full day.

Under Repeating Events, you can identify those meetings, classes and appointments that reoccur and place them on the schedule with a single new event submission. If there is an end to the event recurrence, enter the ending date in the field provided below the Event Repeats box, labeled Repeats Until.



Attendees

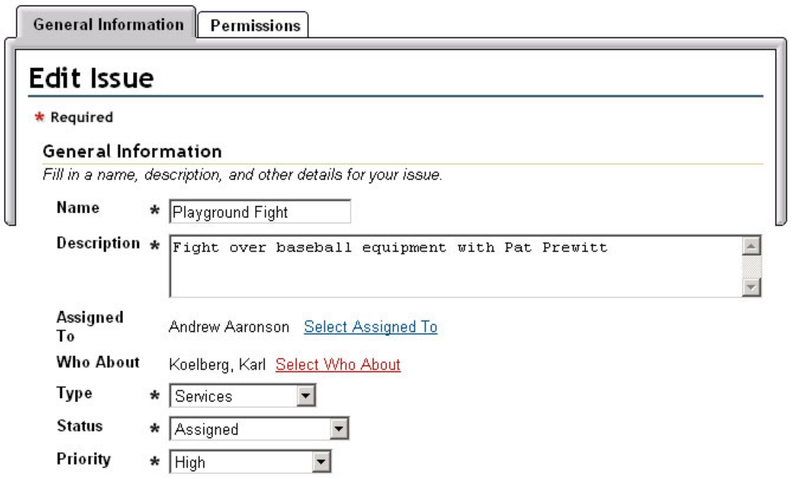
If there are no attendees selected for an event, the calendar function places the event on the Office Manager calendar, but does not distribute it to any user's My Office schedules. To add this event to the individual calendars seen through My Office, click the Attendees tab. If you have already saved the event, access it again through the edit icon, then go to Attendees.



Using the New Attendee button, you may add as many or as few attendees to the event as you wish from a My Relationships screen and the categories available in the Source field.

Issues

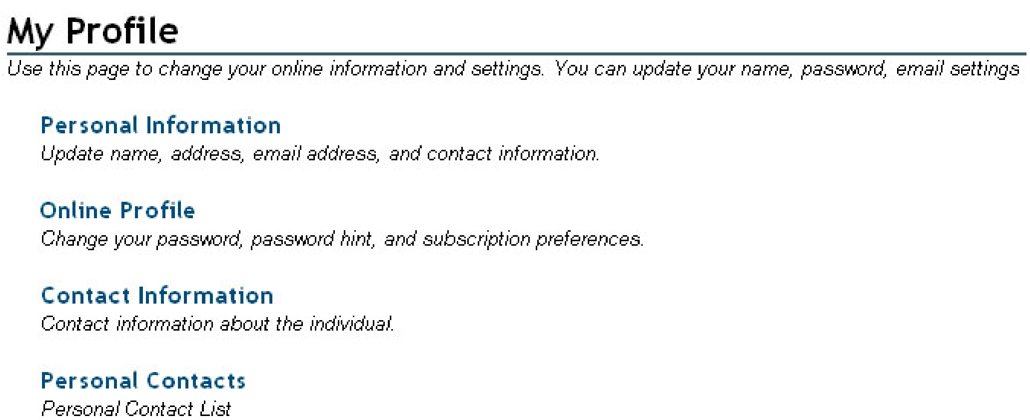
Any issues that you have been assigned, either to yourself as a reminder or by others in the organization, will appear listed on My Office screen and also the Issues screen, where the full list is stored. For more information on each of the issues, click the underlined issue name. Doing so will take you to a pop-up of the original screen on which the issue was created, as seen below.



You may make changes to this screen and the associated screen from this pop-up. However, if you need to initiate a new issue, that is done under the Quality Control Manager.

My Profile

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



The four links displayed let you change your name, address, e-mail address, password, password hint, e-mail subscription preferences, home and work contact information and any persons you have listed as contacts.

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 currently visited appearing at the top as you work with the records.

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. These areas integrate and work together, providing a smooth and functional basis for foundational operations.

Departments

Creating a Department
To create a new department for your organization, click the New Department button. On the resulting screen, establish a name for the department, describe its function or position, add as many members of the department as needed and appoint a department head. Each department you create will be listed on the Departments screen, example below. From this screen, you can access the department for any edits by using the edit icon . Additionally, a roster of all members of the department is available from the users icon .

Departments New Department | Edit Page

This is a list of all departments for your unit.

Name	Description	Department Head	Users	Edit	Delete
Groundskeeping	Employees in regular groundskeeping, not outsource	Andrew Aaronson			
Food Service	Kitchen and Dining Room	Betty Bronson			
Therapy	In-house therapist group	Andrew Aaronson			
Recreational	Recreational guidance counselors	Andrew Aaronson			
Nursing	In-house nursing supervisors	Emma Eakins			

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 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.

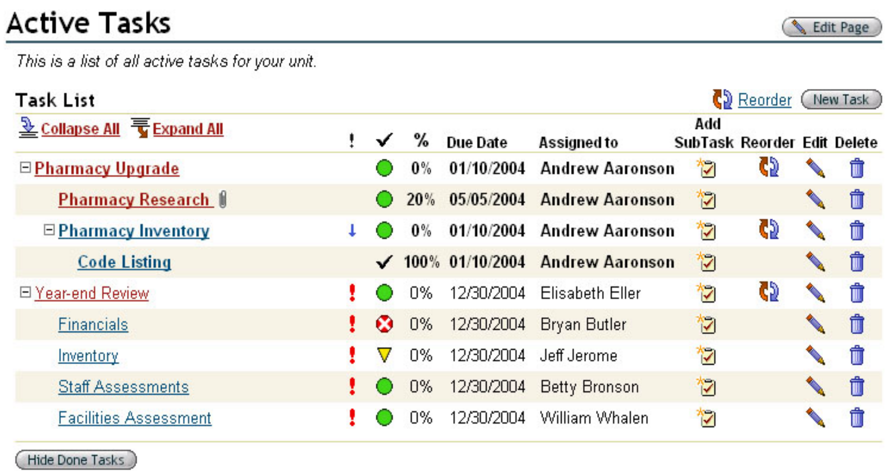
Custom Coded Processes
Processes operate from triggers that are individually programmed (as separately-purchased custom code) specifically to meet your needs. They can be designed to coordinate, organization-wide, an enormous variety of tasks and functions that are requisite in areas such as program admission and discharge, resource allocation, business and financial procedures, facilities maintenance, inventory monitoring, safety practices, certification reviews, marketing strategies, regulatory compliance, etc.

Processes are associated with specific departments and can be assigned to the department head or to a category of individuals in your organization. Prioritizing and setting goals or limits are important features of Processes. Perhaps most important is the ability to send notification when processes are not followed.

Active Tasks

Active Tasks is an extremely useful feature that 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. Active Tasks are not a 'triggered' function (and, therefore, not custom code), but organize and assign functions in areas such as program admission and discharge, resource allocation, business and financial procedures, facilities maintenance, inventory monitoring, safety practices, certification reviews, marketing strategies, regulatory compliance, etc.

All the current Active Tasks for your organization are displayed on the Active Tasks page, see below, with the items that are assigned to the logged-in user appearing in bold type. Tasks are listed by name and may be followed by the attachment icon , which opens any existing attachments.



Active Tasks

Edit Page

This is a list of all active tasks for your unit.

Task List

Reorder New Task

Collapse All Expand All

	!	✓	%	Due Date	Assigned to	Add SubTask	Reorder	Edit	Delete
Pharmacy Upgrade			0%	01/10/2004	Andrew Aaronson				
Pharmacy Research			20%	05/05/2004	Andrew Aaronson				
Pharmacy Inventory	↓		0%	01/10/2004	Andrew Aaronson				
Code Listing		✓	100%	01/10/2004	Andrew Aaronson				
Year-end Review	!		0%	12/30/2004	Elisabeth Eller				
Financials	!		0%	12/30/2004	Bryan Butler				
Inventory	!		0%	12/30/2004	Jeff Jerome				
Staff Assessments	!		0%	12/30/2004	Betty Bronson				
Facilities Assessment	!		0%	12/30/2004	William Whalen				

Hide Done Tasks

Creating a New Task

To create a new task, start by clicking the New Task button at the upper right. A pop-up window appears with a series of fields for defining and assigning the task. Establish a name for the task and whether or not it is a sub-task of an existing task. Enter the due date and the priority. The Assigned To field opens to a drop-down, which allows you to select anyone whose record is contained in your organization to be the assignee. The logged in user's name automatically appears as the person Assigned By. If there are notes for the task, they can be entered in the Note field.

The Non-Compliance section lets you select options for reporting a failure to meet the due date. This may be anything from a reminder to the task owner to a negative report on the owner's performance log to a personal notification sent to the top-level executive in your organization. More than one option may be selected, if desired.

The Task Status tab allows you to set current status or to update a status if the task is underway. The Attachments tab gives you the option of uploading and attaching a pertinent file to the task. You may also click the Permissions tab and allow or restrict access to the task as necessary.

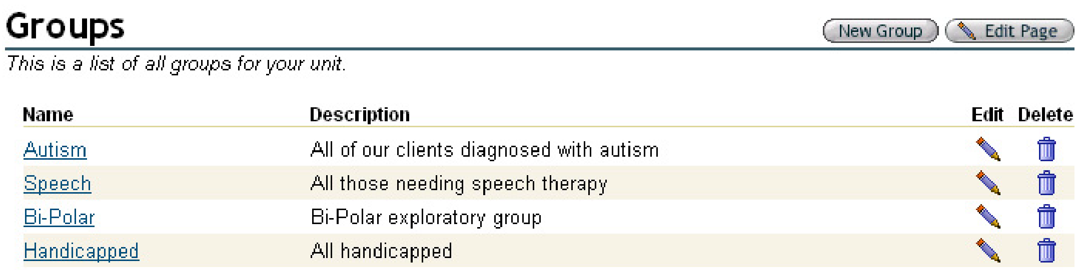
Groups

The Groups function allows you to quickly and easily create groups that fit your exact requirements and then assign as many or as few members as needed. Additionally, you may add Group Notes using the Service Manager module.

Create a New Group

To create a new group, click the New Group button . On the resulting screen, establish a name for the group, describe its function or purpose and add as many members of the group as appropriate.

Each group you create will be listed on the Group screen and a roster of all members of the group is available by clicking the underlined name of the group.



Name	Description	Edit	Delete
Autism	All of our clients diagnosed with autism		
Speech	All those needing speech therapy		
Bi-Polar	Bi-Polar exploratory group		
Handicapped	All handicapped		

Adding a Group Member

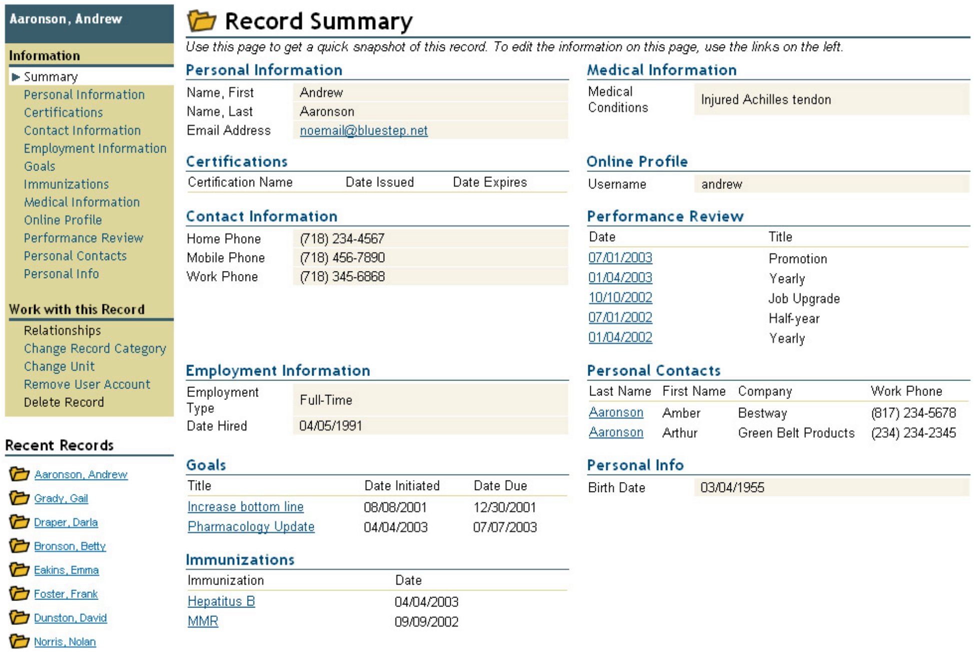
You may add members to a group as it is being created or after it is added to the Groups screen. To add members to an existing group, click the edit icon . Whether you are editing or creating the group, click the Add Member button .

A relationship pop-up will appear, where you may select the category of individuals you would like to add to the group using the Source drop-down. Click on the name of a category. The relationship tree for the chosen category will display on the page and you may click on any underlined individual shown to add them as a group member. Do this as many times as needed to fill the group with members. When finished, remember to click the Save button.

Staff Manager, Marketing/Inquiry Manager, Client Manager, Relationship Manager Records

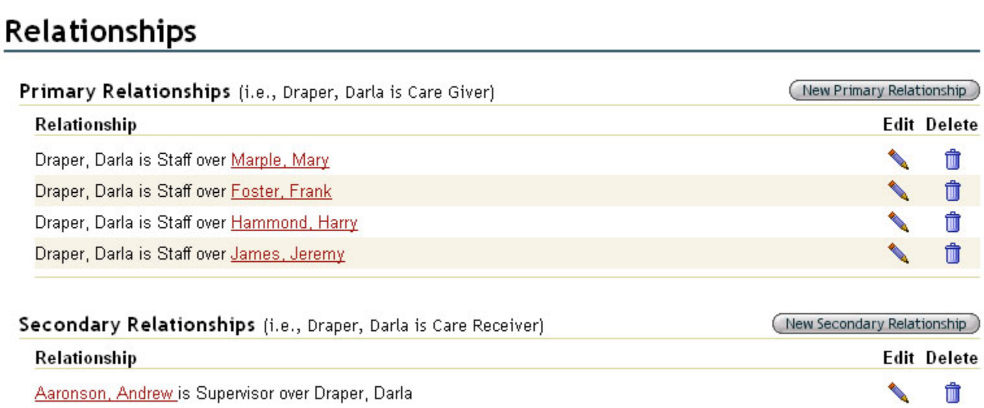
Adding Records

The Add New link (i.e. Add New Staff, Add New Client, etc.) takes you to a series of screens in which information is entered, saved and stored in staff, inquiry, client, responsible party, care partner or non-care partner records, depending upon the area in which you are working.



Creating Relationships

The Relationships link in the record navigation menu is used to establish a relationship between the record you are viewing and any other staff member, 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.

Changing 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 reentering the data or loss of information.

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

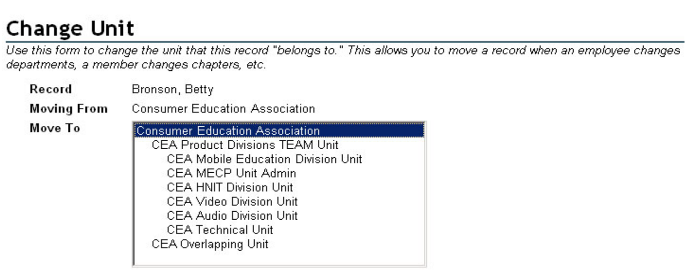
Click on the appropriate category name. If there are fields of required information for the selected category, the forms containing those fields will be presented for you to complete. Click the Save button Save when done and you will be returned to the record summary.

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.

Changing Units

If a record in the HQ™ system needs to be moved from one unit to another, the Change Unit link will allow the move without reentering the data or loss of information.

To do this, click the Change Unit link on the record navigation menu. The resulting screen, example below, 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.

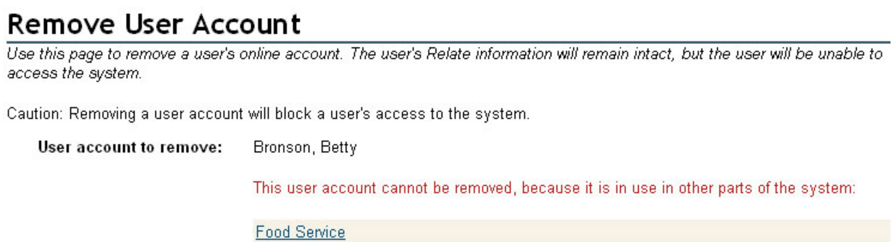


Removing User Accounts

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 the 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 in the record navigation menu. 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.

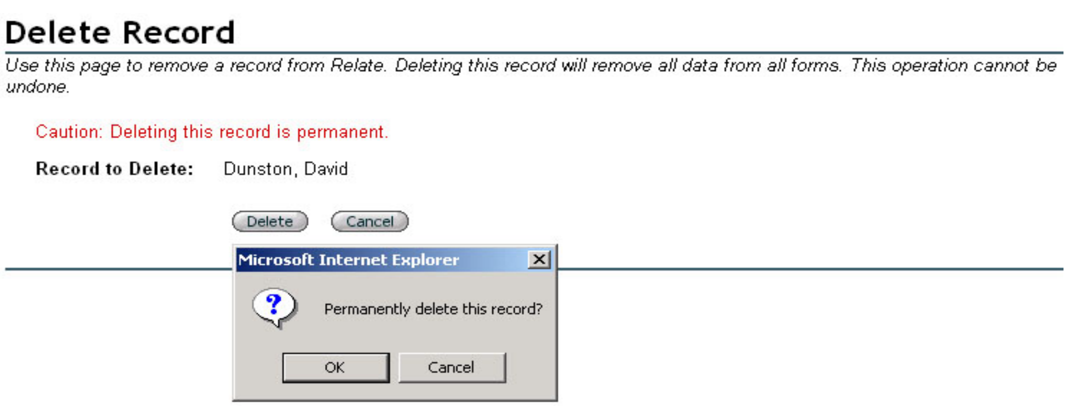
In certain instances, you may receive the red text message "This user account cannot be removed, because it is in use in other parts of the system." If that message appears, a list of User Groups appears below the text. Click on each of the underlined group names, such as Food Service in the example below. 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.



Deleting Records

It may become necessary to entirely remove a record from the system, such as when duplicate records appear. To do this, click on the Delete Record link on the record navigation menu.

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, 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. As described above, click on each of the underlined group names and delete the individual's membership in the group. When that is done, you may return to this screen and proceed with deletion.

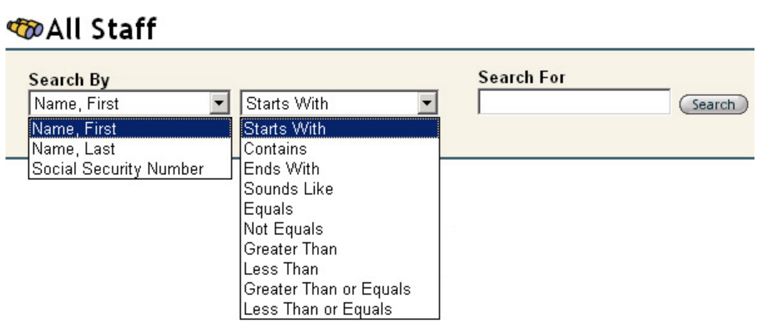
Select Records

The Select link (i.e. Select Staff, Select Client, etc.) under the manager icon gives you access to a screen, which lists every member of your organization who has been designated as one of the categories you are working with (staff, inquiry, client, responsible party, care partner, non-care partner). The page gives you a snapshot of the records of each individual, with a Select link to open each record summary.

Select	Name, Full	Email Address	Date Hired	Social Security Number
Select	Aaronson, Andrew	noemail@bluestep.net	04/05/1991	345-67-8909
Select	Bronson, Betty	noemail@bluestep.net	05/05/1999	456-78-9098
Select	Carlson, Cliff	noemail@bluestep.net	12/12/2002	345-67-8909
Select	Dunston, David	noemail@bluestep.net	10/10/1990	345-34-3456
Select	Eakins, Emma	noemail@bluestep.net	08/09/2000	234-56-7890

Using a Search

If you have a long list of individuals, the Search function will be a useful timesaver in locating the record needed.



The Search By field contains a drop-down list of the fields on which you may conduct the search. In the example above, you would click on the down arrow, then on First Name, Last Name or Social Security number. The next field contains a much longer list of possible search operators. Select one of these options, then proceed to the Search For field.

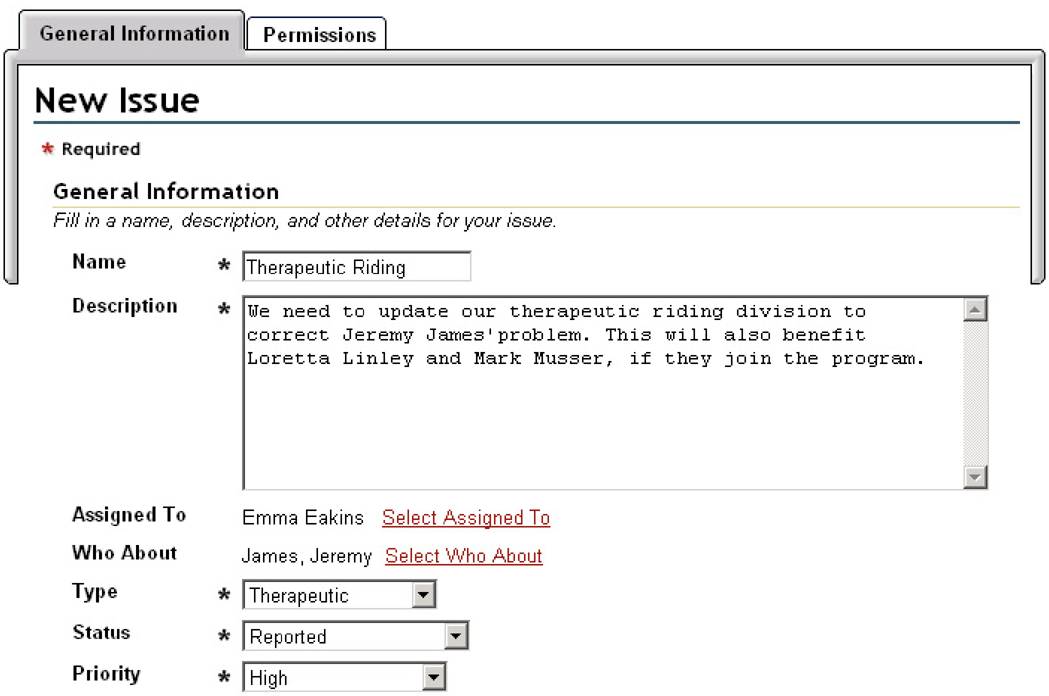
Type an identifier (the name, partial name or number, in this case) for which you are searching and click the Search button 

. The page will repaint with the records that most closely match your search criteria.

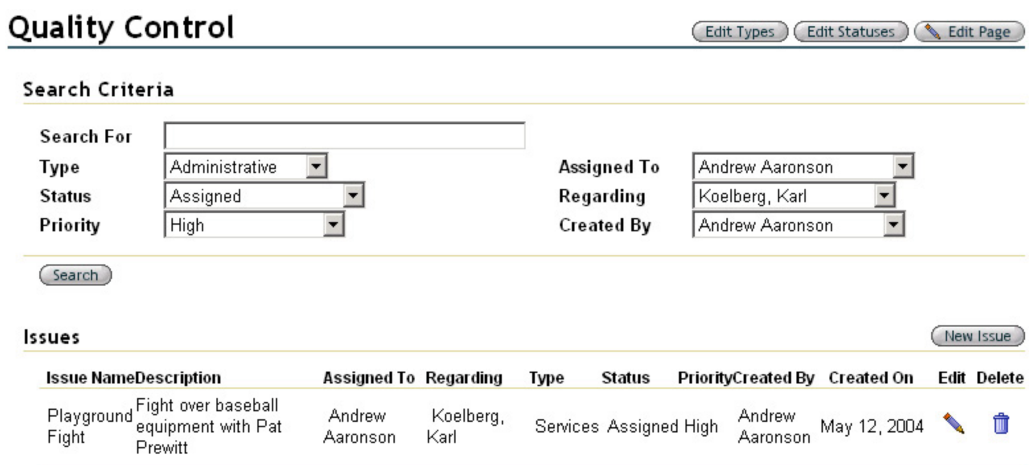
My Staff/Inquiries/Clients/Relationships
The My Staff/Inquiries/Clients/Relationships link allows you access to a relationship tree, similar to that which is displayed in My Relationships under My Office. It contains the names of individuals in the system over whom you have responsibility or who have responsibility over you. You may access the record summary for any of the people listed by clicking on their underlined name. Those whose names are not underlined are a part of your relationship tree, but are not within the category in which you are currently working.

Quality Control Manager

Adding a New Issue
Issues is the area where you will enter any data that is necessary to define and record the issue at hand. Click the New Issue button to access the entry screen. You will be asked to name and describe the issue, as well as make an assignment, which will appear in the assignee's Issues section of My Office. Click the Select Assigned To link for a list of those staff members to which you can assign this issue. If appropriate, you may also click the Select Who About link for a list of clients to reference on this issue.

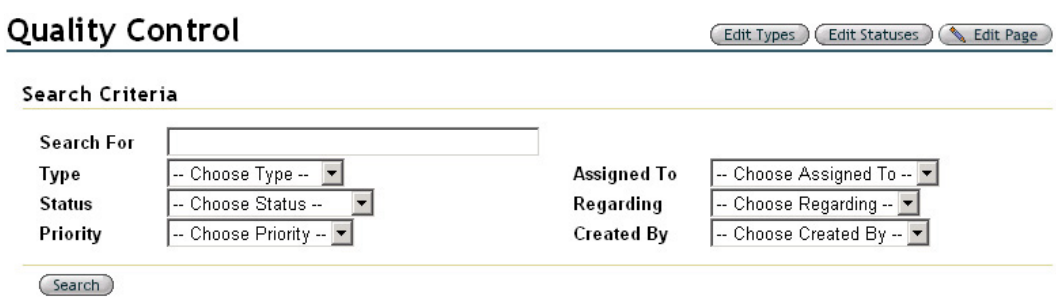


The Type and Status drop-downs will show all the line items that have been previously entered on these lists. The Priority drop-down is populated with High, Medium, Low and Done selections. As with all data entry screens, remember to click the Save button Save when you have completed recording the issue. The Issue will appear in the full list of issues when you return to the Quality Control screen.



Conducting a Search
The Search section allows you to find any issue that has been entered into the system through the above screen. There are a variety of ways in which to search for the needed issues using the issue name field or the Type, Status, Priority, Assigned To, Regarding or Created By drop-downs. The defaults for each of these fields are blank when you open the Quality Control screen. You do not need to fill in all of them, but at least one and only those that apply to the item you are trying to locate or those that seem most characteristic of the issue for which you are looking.

Click the Search button and the screen will repaint with the results displayed under the Issues title, replacing the full list of issues.



Service Manager

The Service Manager module is presently restricted for use by Organization Administrators only. A major revision of this portion of HQ is underway and will be released for general use by appropriate staff members when programming and testing is complete.

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 behavioral health treatment libraries from industry standard treatment planners, which can be purchased for any organization and dovetail seamlessly into record summaries and individual service plans.

Working with Clients
Entering clients into the HQ™ system is done through the Client Manager, then accessed for treatment and service plan purposes through the Service Manager. For this reason, client records seen in the Client Manager and the Service Manager contain different elements, appear different on the screen and provide access to different types of information, most notably Approved Services, Assessments, Service Log, Sessions, Service Plans, Prognosis, Discharge and Client Notes. It is always possible to have a Relate™ licensee at your organization make changes to these or to contract with BlueStep™ to add more forms, gathering additional information, or to include more fields on existing forms, if needed.

The Client Manager summary contains data from forms such as, Personal Information, Arrests and Convictions, Contact Information, Education, Medical Information, Substance Abuse and others. See the **Client Manager** section for details.

Select Client

Once clients have been entered into your system, you will need to retrieve their records to add information and review data. The Select Client link opens the All Clients screen showing every individual who has been designated "Client" (a member of the Client record category). The page gives you a brief listing of the records of each individual, with a Select link to access a record summary. (See **Using the Record Summary** discussed in **Staff Manager**.)

The display columns seen on this page were selected at the time HQ™ was configured for your organization. They may be changed by someone in your organization with a Relate™ license or by BlueStep™, upon request.

Using a Search
If you have a long list of clients, the Search function is a quick way to locate the record needed. The Search By field contains a drop-down list of the fields on which you may conduct the search. In the example below, click on the down arrow, then on either first name, last name or Social Security number.

The next field (Starts With is the first selection) contains a much longer list of possible search operators. Select one of these options, then proceed to the Search For field. Type an identifier (the name, partial name or number, in this case) for which you are searching and click the Search button Search. The page will repaint with the records that most closely match your search criteria. Click the Select link and proceed to work with the record as described in **Using the Record Summary** in **Staff Manager**.

The fields available for search under Search By were selected at the time HQ™ was configured for your organization. As above, they may be changed by an individual with a Relate™ license or by BlueStep™, upon request.

My Clients

The My Clients link allows you access to a relationship tree, similar to that which is displayed in My Relationships under My Office. It contains the names of clients in the system over whom you have responsibility or those who have responsibility over you. You may access the record summary for any of the people listed by clicking on their underlined name. See **Using the Record Summary** in **Staff Manager**.

The relationships displayed in My Clients are for informational viewing, reference and record summary retrieval. Making changes, additions or deletions to the people shown on your client tree is handled through the Relationships link on your own record navigation menu or the menus of those individuals concerned.

Service Libraries

Service Libraries

Use these libraries to configure the services that your organization provides.

Service Plans Library
Add and edit service plans such as treatment plans, education plans, or specialized service plans

Modality Library
Add and edit the available modalities for your organization

Assessment Library
Add and edit assessments

Service Items Library
Add and edit the service items your organization provides

Discharge Criteria Library
Add and edit discharge criteria used by your organization

Doctors, psychologists, psychiatrists, behavioral therapists, physical therapists, educators, counselors, social workers, nurses or clinicians of any type will be able to interact with libraries within the Service Library to create, customize and access a plan to help any client in your organization.

- **Service Plans Library** outlines all the definitions, diagnoses, goals, objectives and interventions used by professionals at your organization to treat a client's problem, i.e. a Treatment Plan (for anger management, for depression, etc.), an Education Plan (for learning disability, for physical impairment, etc.), a Physical Therapy Plan (for autism, for injury rehabilitation, etc.). This library defines *what* treatments your organization can implement for a client.

- **Modalities Library** contains the types of treatment regimen to be used by professionals at your organization to treat the client's problem, i.e., Conjoint Cognitive Psychotherapy, Hippotherapy, Individual Behavior Therapy, etc. This library defines *how* your organization can implement treatments for a client.

- **Assessments Library** defines the categories and instruments used by professionals at your organization to assess the client's problem and its progress, i.e. Intake Assessment, Weekly Assessment, Group Assessment, etc. This library defines the treatment *status* of a client at your organization.

- **Service Items Library** lists those services, of any description and by any means, that are accessible to clients by way of your organization, i.e. Therapy Session, In-House Meals, Educational Testing, etc. This library *quantifies* all services available to a client through your organization.

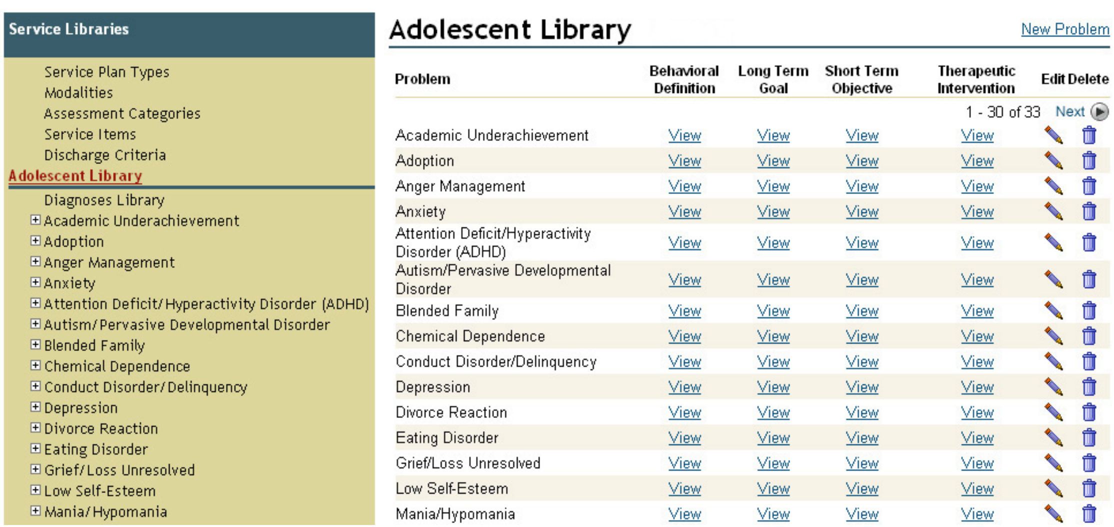
- **Discharge Criteria Library** describes the guidelines used by the professionals at your organization to determine if a client is qualified for discharge from your program, i.e. Client can self-monitor medications, Injury is healed, Client responsive to authority, etc. This library defines *when* treatment for a client can be terminated by your organization.

Service Plans Library
The operation of any imported standard libraries and those that you create and structure yourself is exactly the same. If you desire your self-created library plans to match names and terms with industry standard treatment planners, the HQ™ functions will allow you to mimic those planners exactly. If you desire to vary the naming conventions or apply standard treatment structure to plans outside of the behavioral health field, the fields and functions can be designated as desired. See **Creating a Service Plan**, below.

On the Service Libraries screen, click the Service Plans Library link. On the resulting screen, you will see all the libraries that have been pre-populated in your HQ™ and any that have been manually created. In the example below, both the Addiction and Adolescent Libraries are industry standard planners that have been uploaded to the system.

Viewing the Plan
To view the plan, click the View link under the Plan Library column. A display of the elements of the library will be shown. As you can see in the partial-page example below from the Adolescent Library (showing just 15 of the 33 plan problems), the libraries are quite extensive and contain hundreds of pages of definitions, goals, objectives and interventions, as well as diagnoses under a separate view link. Also, please note that navigation through all of the pages on this view can be simplified by using the record navigation menu, shown on the left.

As above, you may edit the title of a specific problem within the library by clicking the edit icon. To delete a problem, click on the delete icon. To create a new service plan, see **Creating a Service Plan**, below.



To view a Behavioral Definition, a Long-Term Goal, a Short-Term Objective or a Therapeutic Intervention, click on the View link opposite the problem name and under the appropriate column. To add a new problem to this list, see **Adding a New Problem**.

Displayed below is the Behavioral Definition screen for Academic Underachievement from the Adolescent Library.

Academic Underachievement Behavioral Definitions

New Behavioral Definition

Behavioral Definition	Edit	Delete
History of academic performance that is below the expected level, given the client's measured intelligence or performance on standardized achievement tests.		
Repeated failure to complete homework assignments on time.		
Poor organization or study skills.		
Frequent tendency to postpone doing homework assignments in favor of engaging in recreational and leisure activities.		
Positive family history of members having academic problems, failures, or disinterest.		
Feelings of depression, insecurity, and low self-esteem that interfere with learning and academic progress.		
Recurrent pattern of engaging in acting-out, disruptive, and negative attention-seeking behaviors when encountering frustration in learning.		
Heightened anxiety that interferes with performance during tests.		
Parents place excessive or unrealistic pressure on the client to such a degree that it negatively affects the client's academic performance.		
Decline in academic performance that occurs in response to environmental stress (e.g., parents' divorce, death of loved one, relocation, or move).		

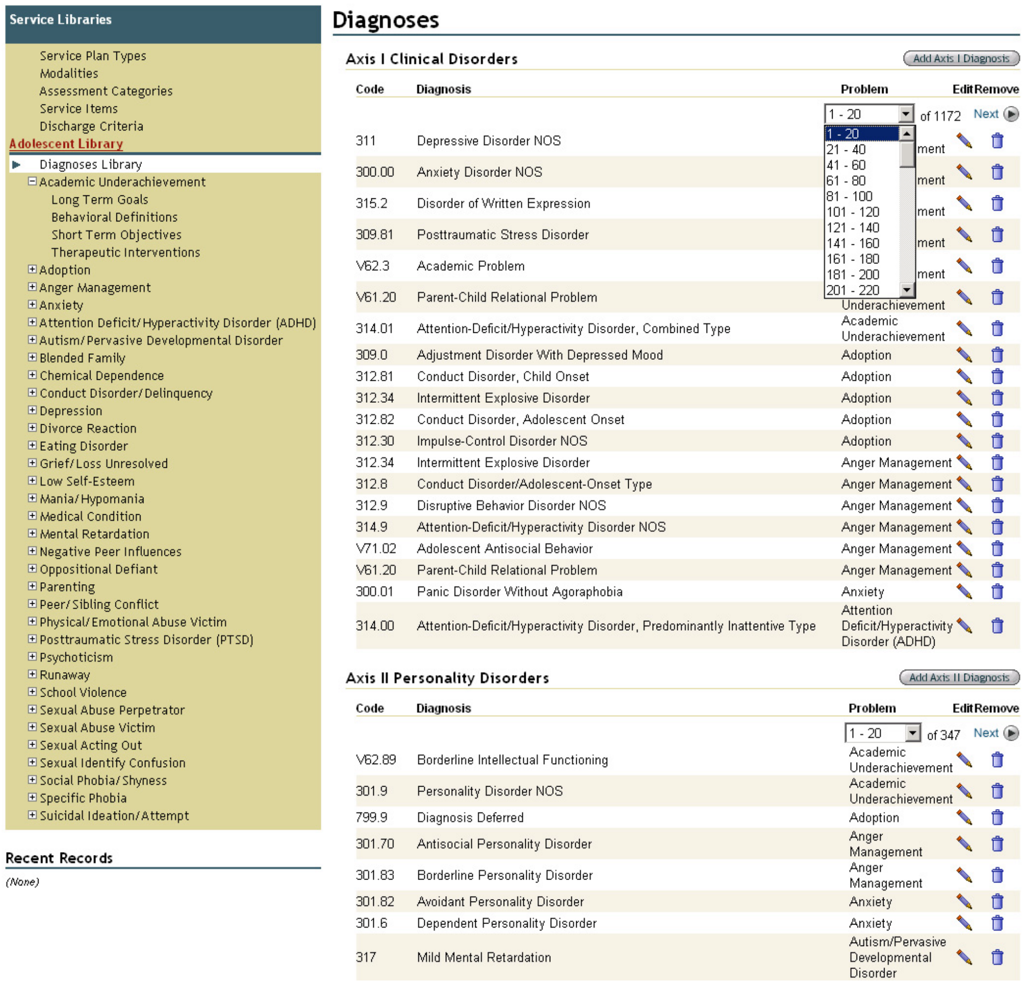
If you desire to customize a definition, goal, objective or intervention, click on the edit icon opposite the desired item. On the resulting screen, the existing definition (goal, objective or intervention) is displayed and you may edit it as desired. Remember to click the Save button when done. To add a new definition to this list, see **Adding a New Definition**, below.

Viewing the Diagnoses

Back on the Service Plans Library screen, you may also view and customize the Diagnosis Library, just as you did the Plan Library, by clicking the View link.

The resulting page displays all of the Axis I, Axis II, Axis III, Axis IV and Axis V diagnoses, including codes, that exist in the system. If you have *any* standard treatment libraries added to your system, all diagnoses will appear. If you are creating *all* of your own plan libraries, none will appear until you create them. After you enter the diagnoses, all of them will become available for use with any problem.

On the Diagnosis screen, the separate axis diagnoses are grouped by the problem to which they apply and are displayed on the screen, twenty (20) at a time. You may jump further down in the list of diagnoses, within each axis, using the numeric drop-down. See the drop-down box opened under the Problem column in Axis I displayed in the illustration below.



Creating a Service Plan

If you desire to create your own or an additional library, select the New Service Plan Type button New Service Plan Type. The screen will prompt you to name the structural elements of the plan.

Please note that you are configuring the *structure and layout* of the plan on this screen, **not** creating the plan-specific problems, definitions, goals, objectives and interventions.

If you desire this plan to conform in layout and structure to the industry standard, use terms such as those displayed below. If you are creating a plan that is outside the behavioral health field, such as a language plan, a tutoring plan or a sports-wellness plan, etc., you will have different naming conventions that you should follow in structuring your library.

New Service Plan Type

* Required

Plan Type Name	*	Behavioral Health
Issue Name	*	Problem
		☑ Definitions Enabled
Definitions Name	*	Behavioral Definition
		☑ Goals Enabled
Goals Name	*	Long-Term Goals
		☑ Objectives/Interventions Enabled
Objectives Name	*	Short-Term Objectives
Interventions Name	*	Therapeutic Interventions

Please note that the terms used in the example above, Problem, Behavioral Definition, Long-Term Goals, Short-Term Objectives and Therapeutic Interventions, conform to the standard treatment planner format. In HQ™, they correspond to the column headers on the individual library screens under the View link. See the Addiction Library (partial-page example below, showing just 10 of the 37 library problems) or the Adolescent Library screen shown above.

Addiction Library

New Problem

1 - 30 of 37 Next

Problem	Behavioral Definition	Long Term Goal	Short Term Objective	Therapeutic Intervention	Edit	Delete
Adult-Child-of-an-Alcoholic Traits	View	View	View	View		
Anger	View	View	View	View		
Antisocial Behavior	View	View	View	View		
Anxiety	View	View	View	View		
Attention-Deficit/Hyperactivity Disorder (ADHD)	View	View	View	View		
Attention-Deficit/Inattentive Disorder	View	View	View	View		
Borderline Traits	View	View	View	View		
Childhood Trauma	View	View	View	View		
Dependent Traits	View	View	View	View		
Depression	View	View	View	View		

For the purposes of our discussion, these columns and the resulting links will be referred to in this guide as if they had been titled using the standard treatment planner naming conventions.

When you are satisfied with the column names you have selected, click the Save button. The Service Plans Library screen will repaint with the new plan added to the plan list. The Plan Library must be created next. Click the View link associated with the new Plan Type.

Adding a New Problem

This creates a new entry in the ***first*** *column of the selected library screen (not the Service Plans Library screen). If you have named the first column Problem, as in the standard treatment planner, the columns and links will read 'Problem', 'New Problem', etc. If you have titled the first column another name, such as Issue, Topic or Situation, etc., the columns and links will be seen with the name you have designated, such as 'Issue', 'New Issue', etc. For the purposes of our discussion, columns and links will be referred to as if they had been titled using the standard treatment planner naming conventions.*

On the screen displayed by the View link under Plan Library, click the New Problem button. Type a problem name in the field and click the Save button. The new problem will appear on the selected library list. Designate as many problems as needed to fill the library with which you are working. When all problems are entered, click the Done button. The library screen will repaint.

Behavioral Health Library New Problem

Problem	Behavioral Definition	Long-Term Goals	Short-Term Objectives	Therapeutic Interventions	Edit	Delete
Anxiety	View	View	View	View		
Depression	View	View	View	View		
Bi-Polar	View	View	View	View		

The next step in creating this library is to enter the behavioral definitions. Click the Behavioral Definitions View link associated with a problem.

Adding a New Definition

This creates a new entry in the ***second*** *column of the selected library screen (not the Service Plans Library screen). If you have named the second column Behavioral Definition, as in the standard treatment planner, the columns and links will read 'Behavioral Definition', 'New Behavioral Definition', etc. If you have titled the first column another name, such as Description or Characteristics, etc., the columns and links will be seen with the name you have designated, such as 'Description', 'New Description', etc. For the purposes of our discussion, columns and links will be referred to as if they had been titled using the standard treatment planner naming conventions.*

Click the View link in the Behavioral Definitions column for the problem you wish to define (Depression in this example). A list of all current definitions will appear, if any have been entered. Click the link New Behavioral Definition at the upper right. Type a definition into the field on the resulting screen and click the Save button.

The list of all definitions will reappear with the new definition added.

Depression Behavioral Definitions

New Behavioral Definition

Behavioral Definition	Edit	Delete
Reduced appetite		
Increased sleep		
Feelings of hopelessness, worthlessness, or inappropriate guilt		
Poor concentration and indecision		
Lack of interest in previously enjoyed activities		
Low energy		
Isolation from family and/or peers		
Deterioration in work or academic performance		
Moody irritability		

When you have added as many definitions as needed for this problem, click the Done button Done at the bottom of the definitions screen. The screen will repaint with the library screen. Continue by adding definitions to the other problems displayed on the screen (Anxiety and Bi-Polar in the example above) by using the View links under the definition column associated with each problem.

The next step in creating this library is to define the long-term goals. Click the Long-Term Goals View link associated with a problem.

Adding a Long-Term Goal

*This creates a new entry in the **third** column of the selected library screen (not the Service Plans Library screen). If you have named the third column Long-Term Goals, as in the standard treatment planner, the columns and links will read 'Long-Term Goals', 'New Long-Term Goals', etc. If you have titled the first column another name, such as Target or Milestones, etc., the columns and links will be seen with the name you have designated, such as 'Target', 'New Target', etc. For the purposes of our discussion, columns and links will be referred to as if they had been titled using the standard treatment planner naming conventions.*

Click the View link in the Long-Term Goals column for the problem with which you are working (Anxiety in this example). A list of all current goals will appear, if any have been entered. Click the link New Long-Term Goals at the upper right. Type a goal into the field on the resulting screen and click the Save button Save. The list of all goals will reappear with the new goal added.

Anxiety Long-Term Goals

New Long-Term Goals

Long-Term Goals	Edit	Delete
Resolve the key issue that is the source of the anxiety or fear		
Reduce the overall frequency and intensity of the anxiety response so that daily functioning is not impaired		
Interact with the world without excessive fear, worry, or anxiety		
Stabilize the anxiety level while increasing the ability to function on a daily basis		

When you have added as many goals as needed for this problem, click the Done button Done. The screen will repaint with the library screen.

Continue by adding goals to the other problems displayed on the screen (Depression and Bi-Polar in the example above) by using the View links under the definition column associated with each problem.

The next step in creating this library is to define the short-term objectives. Click the Short-Term Objectives View link associated with a problem.

Adding a Short-Term Objective

This creates a new entry in the **fourth** column of the selected library screen (not the Service Plans Library screen). If you have named the fourth column Short-Term Objectives, as in the standard treatment planner, the columns and links will read 'Short-Term Objectives', 'New Short-Term Objectives', etc. If you have titled the first column another name, such as Events or Levels, etc., the columns and links will be seen with the name you have designated, such as 'Events', 'New Events', etc. For the purposes of our discussion, columns and links will be referred to as if they had been titled using the standard treatment planner naming conventions.

Click the View link in the Short-Term Objectives column for the problem with which you are working (Bi-Polar in this example). A list of all current objectives will appear, if any have been entered. Click the link New Short-Term Objective at the upper right. Type an objective into the field on the resulting screen. Click the Save button Save.

For the time being, the Add Therapeutic Interventions section of the screen will contain no data. After you have added Therapeutic Interventions to the library, interventions will become available for use with the Short-Term Objectives screen. See Adding Interventions to Objectives, below.

The list of all objectives will reappear with the new objective added.

Bi-Polar Short-Term Objectives New Short-Term Objectives

Short-Term Objectives	Edit	Delete
Identify family dynamics or stressors that contribute to the emergence of behavioral problems		
Actively participate in the group therapy process		
Increase the frequency of responsible and positive social behaviors		
Identify and verbalize the risks involved in sexually promiscuous behavior		
Comply with a physician evaluation and take medication as prescribed		

When you have added as many objectives as needed for this problem, click the Done button Done. The screen will repaint with the library screen.

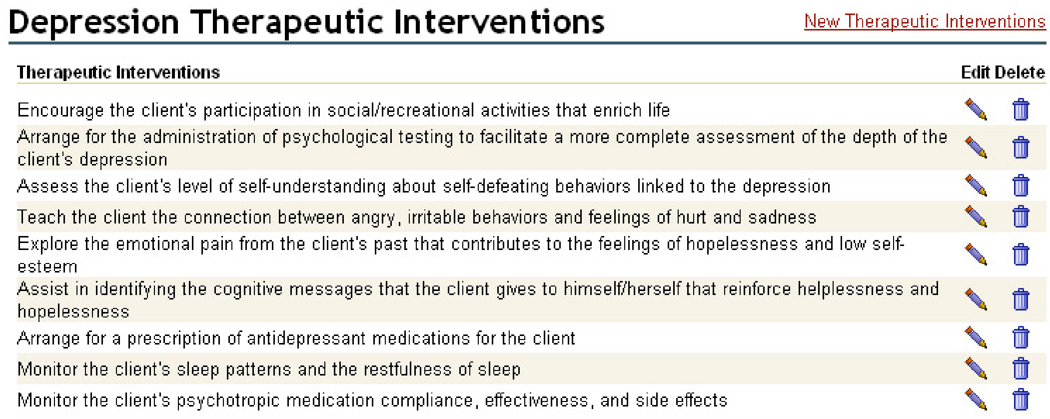
Continue by adding objectives to the other problems displayed on the screen (Depression and Anxiety in the example above) by using the View links under the definition column associated with each problem.

The next step in creating this library is to define the therapeutic interventions. Click the Therapeutic Interventions View link associated with a problem.

Adding a Therapeutic Intervention

*This creates a new entry in the **fifth** column of the selected library screen (not the Service Plans Library screen). If you have named the fifth column Therapeutic Interventions, as in the standard treatment planner, the columns and links will read 'Therapeutic Interventions', 'New Therapeutic Interventions', etc. If you have titled the first column another name, such as Assignments or Mediation, etc., the columns and links will be seen with the name you have designated, such as 'Assignments', 'New Assignments', etc. For the purposes of our discussion, columns and links will be referred to as if they had been titled using the standard treatment planner naming conventions.*

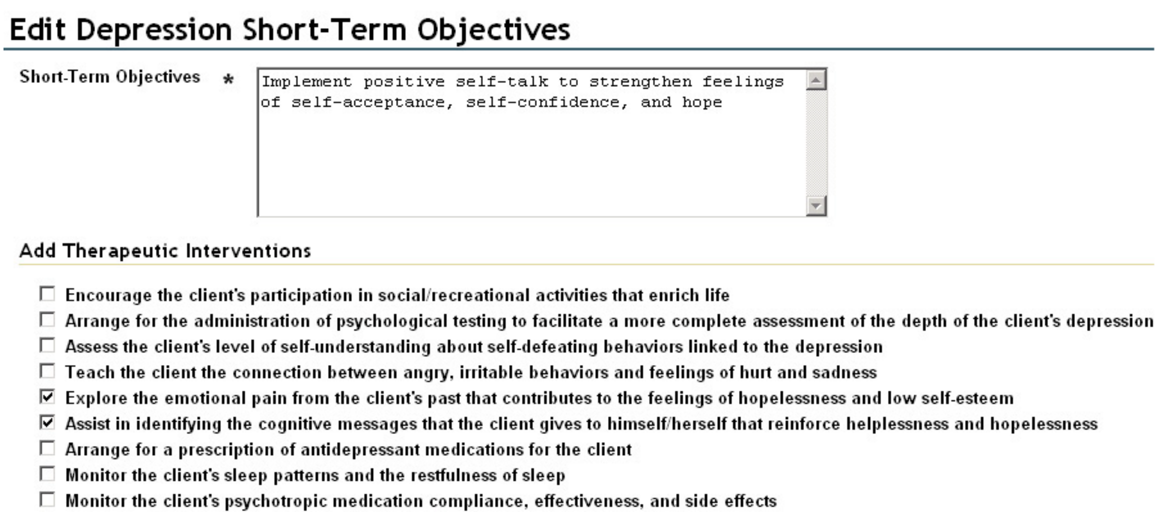
Click the View link in the Therapeutic Interventions column for the problem with which you are working (Depression in this example). A list of all current interventions will appear, if any have been entered. Click the link New Therapeutic Intervention at the upper right. Type an intervention into the field on the resulting screen and click the Save button. The list of all interventions will reappear with the new intervention added.



When you have added as many objectives as needed for this problem, click the Done button. The screen will repaint with the library screen. Continue by adding interventions to the other problems displayed on the screen (Anxiety and Bi-Polar in the example above) by using the View links under the definition column associated with each problem.

Adding Interventions to Objectives

When each problem has had therapeutic interventions added to the library, return to the Short-Term Objectives column. Click on the edit icon in the objective column associated with any problem. The Add Therapeutic Interventions section of the screen will contain all of the interventions that have been added to the library, as in the partial-view page below from the Depression Short-Term Objectives screen. Click in each appropriate checkbox to select the intervention(s) to be used for the specific problem.



When all interventions have been selected, click the Save button. The Sort-Term Objectives screen will reappear. Select the edit icons for each remaining objective on the screen one at a time until all objectives have one or more interventions selected to achieve the desired results.

Modality Library
Modalities are a vitally important component in the treatment of a client. Using the Modality Library, clinicians can offer approved treatments adapted to the needs of the client from a comprehensive source list, one customized on the basis of your organization's clinical strengths and treatment preferences. The Modality Library lets you define and structure the ways in which treatment is provided to your clients and supports the staff in building an all-inclusive plan from a cleanly-defined range of possible options.

Modality Library New Modality

Modality	CPT Code	Edit	Delete
Experiential Therapy	23456		
Electroconvulsive Therapy	56780		
Pharmacotherapy	78978		
Supportive Psychotherapy	43243		
Psychodynamic Psychotherapy	87654		
Group Therapy	98765		
Hippotherapy	56789		
Cognitive Behavioral Therapy	17478		
Family or Conjoint Therapy	90847		
Individual Therapy	90844		

Adding Modalities
To add a new modality, click the New Modality button New Modality . On the resulting screen enter the name of the modality you wish to add and its associated CPT code. Click the Save button Save when done. The Modality Library will repaint. Add as many modalities as needed to cover all possible modalities used by your organization's clinicians.

Assessment Library
The Assessment Library is a critical element in gauging the effectiveness of your program and the success and progress of your clients. The library allows you to establish and formalize assessment techniques, providing consistency and uniformity in evaluating clients and eventually leading to client discharge.

Assessment Library New Category

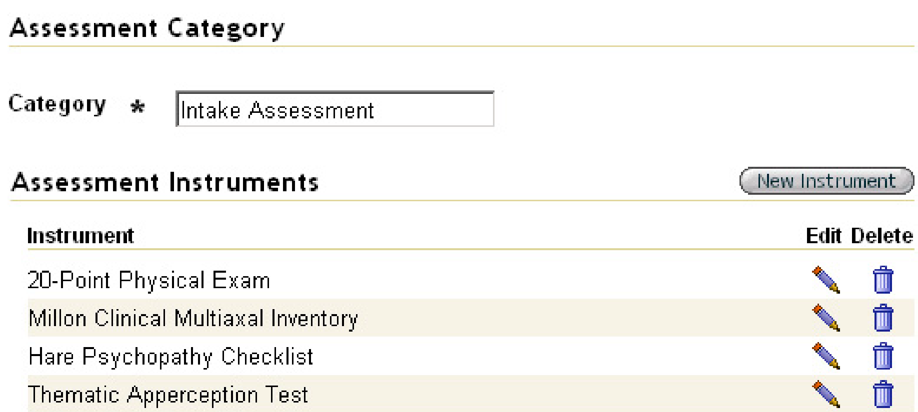
Category	Edit	Delete
Discharge Assessment		
Strength Assessment		
Educational Assessment		
Weekly Assessment		
Intake Assessment		
Preliminary Assessment		
Full Assessment		

To add a new assessment category, click on the New Category button at the upper right. On the resulting screen enter a name for the category and click the Save button. The Assessment Library screen will be displayed again with the new category added.

Adding New Assessment Instruments

Click the edit icon opposite the new category. The original category screen will appear with an added Assessments Instrument section. Click the New Instrument button and enter the name of an assessment instrument to be associated with this category and used when performing this assessment. Click the Save button.

The Assessment Category screen will repaint, displaying the added instrument. Continue to add as many instruments as needed. When you have entered all the appropriate instruments, click the Save button at the bottom of the Assessment Category screen and the Assessment Library screen will return.



Service Items Library

The Service Items Library allows you to keep a descriptive and quantified master list of all services that are provided by your organization. These can be defined in broad or narrow terms, divided into service or provider increments or contain multi-point definitions with as much detail as desired to identify and specify the individual services. Clicking on the Service Items Library link on the Service Library main screen will open the library and display all Service Items currently entered, example below.

Service Items Library

New Service Type

Description	Edit	Delete
Group Therapy Session - Dr. Labrum		
Assessment Session		
Meals and Snacks		
Supervised Group Sports - Mt. Olympus Outfitters		
Activities Class - Bob Forrester		
Group Therapy Session - Dr. Weston		
Therapy Pool Session		
Billing and Record Keeping Service - Daytracker Coding and Billing Service		
Laundry Service		
Housekeeping Service		
Physical Therapy Session - Chris Thornley		
Behavior Modification Therapy - Dr. Steinaker		
Classroom Testing Session		
Hippotherapy Session - Martindale Riding Academy		
Barber and Salon Service - Katie Converse/Great Clips		
Individual Psychotherapy Session - Drs. Spencer & Coverdale		

To add a new service, click the New Service Type button New Service Type at the upper right. On the Service Type screen, the Description field has room as many characters (letters, numbers, etc.) as needed for a complete description of the service. Select a quantifier from the Billing Unit drop-down selections: Daily, Weekly, Monthly, Hourly or Unit. Then enter the dollar amount in the Billing Rate field. Click the Save button Save when done. The Service Items Library will repaint with the new service added.

At any time, you may delete unneeded services by clicking the delete icon opposite the service name or modify/update the service information using the edit icon .

Discharge Criteria Library
To create a Discharge Criteria Library, you will need to qualify and quantify all the discharge guidelines that could be used for any of your clients. These may be few or many, and contain numerical standards or lengthy, multi-point descriptions, as best meets the needs of your clients and organization. Clicking on the Discharge Criteria Library link on the Service Library main screen will open the library and display all Discharge Criteria currently entered, example below.

Discharge Criteria Library New Criteria

Criteria	Edit	Delete
Able to empathize and clarify feelings of hurt		
Can interact in job situation. Dresses appropriately, arrives on time, is attentive, follows directions, learns job requirements, remains on-task, is cooperative and productive.		
Stuttering completely eliminated		
Stuttering partially eliminated		
Anger directed appropriately		
Obsessive compulsions 100% controlled		
Obsessive compulsions 80% controlled		
Obsessive compulsions 50% controlled		
Responsive to authority		
Injury 100% healed		
Injury 80% healed		
Able to monitor own medication. Understands doctor and pharmacy instructions. Aware of dosage intervals and conditions. Follows instructions.		

Adding a New Criterion

To place a new discharge criterion on the library list, click the New Criteria button New Criteria. The resulting screen, seen below, displays a single line field that can contain as many characters (letters, numbers, etc.) as you need to fully describe the criterion. Remember to click the Save button when done. To edit any criterion appearing in the library, click on the edit icon , make the necessary changes and click the Save button Save. The Discharge Criteria Library screen will repaint, displaying the added criterion. Continue to add as many criteria as needed until you have entered all the appropriate criteria.

Adding Services to a Client Record

The customized, interrelated information contained in the libraries forms the basis of treatment planning, billing charges, progress reports, clinical notes, discharge recommendations, etc. only when it is applied to your clients and appears in their individual Client Service record.

The Client Service Summary that is accessed under the Service Manager, seen below, contains forms and fields that are specific to the client's treatment and different from the Record Summary stored in the Client Manager.

The default forms under Service Manager are Approved Services, Assessment, Sessions, Service Plans, Service Log, Prognosis, Discharge and Client Notes. If other client service forms have been created for your HQ™, they will appear on the list of forms contained on the record navigation menu at the left and also in a summarized format on the main portion of the page. To view complete information on any of these items, click on the form name in the record navigation menu or on the section title on the main portion of the page.

The sections on the Service Summary page will be discussed below in the order they appear on the record navigation menu. However, it may be more efficient and realistic for you to work with each section in the order needed. Of necessity, the Assessments, Service Plans and Approved Services sections need to have at least some entries before the Sessions, Prognosis, Client Notes and Discharge sections become applicable.


Hammond, Harry Client Service Summary

Edit Page

Approved Services

Service Type	Units
Group Therapy	8
Individual Psychotherapy	25

Service Log

Date Provided	Service Type
4/9/2004	Cognitive Behavioral Therapy
4/16/2004	Cognitive Behavioral Therapy
4/23/2004	Cognitive Behavioral Therapy
4/30/2004	Family or Conjoint Therapy
5/7/2004	Family or Conjoint Therapy

Assessment

Assessment	Date
Clinical Interview	7/10/2004

Prognosis

Rating	Completion Date
Excellent	12/30/2004

Sessions

Date	Approach
4/9/2004	Cognitive Behavioral Therapy
4/16/2004	Cognitive Behavioral Therapy
4/23/2004	Cognitive Behavioral Therapy
4/30/2004	Family or Conjoint Therapy
5/7/2004	Family or Conjoint Therapy

Discharge

Criteria
Appetite at acceptible levels and likely to stay there
Able to empathize and clarify feelings of hurt
Anger directed appropriately
Responsive to authority
Able to monitor own medication. Understands doctor and pharmacy instructions. Aware of dosage intervals and conditions. Follows instructions.

Service Plans

Service
Behavioral Health
Adolescent Library

Client Notes

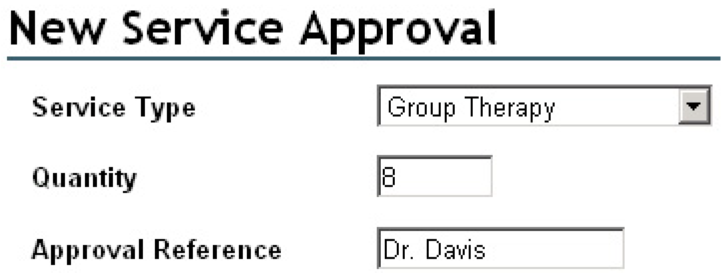
Note Date	Note Type	Title
07/30/2004 1:40PM	General	Social Development
07/03/2004 3:16PM	General	Social Integration

Approved Services Summary
To see all approved services for the specific client with which you are working, click on the Approved Services link in the record navigation menu or on the section title within the main portion of the screen. The resulting screen contains a list of all services that have been approved and includes the number of service sessions, treatments, units, etc. that have been authorized for this client. To add new approvals for this client, click the New Service Approval button. On the resulting screen, select a service type from the drop-down.

The service types seen on this list were established in the Service Items Library. If you do not see the service type that you need for this client, go to the library and create the new type following the instructions under **Service Items Library**, above.

The quantity field reflects the amount/number of this particular service that is appropriate for the client. The approval reference field should be filled with the name of the individual prescribing or authorizing this service type and quantity.

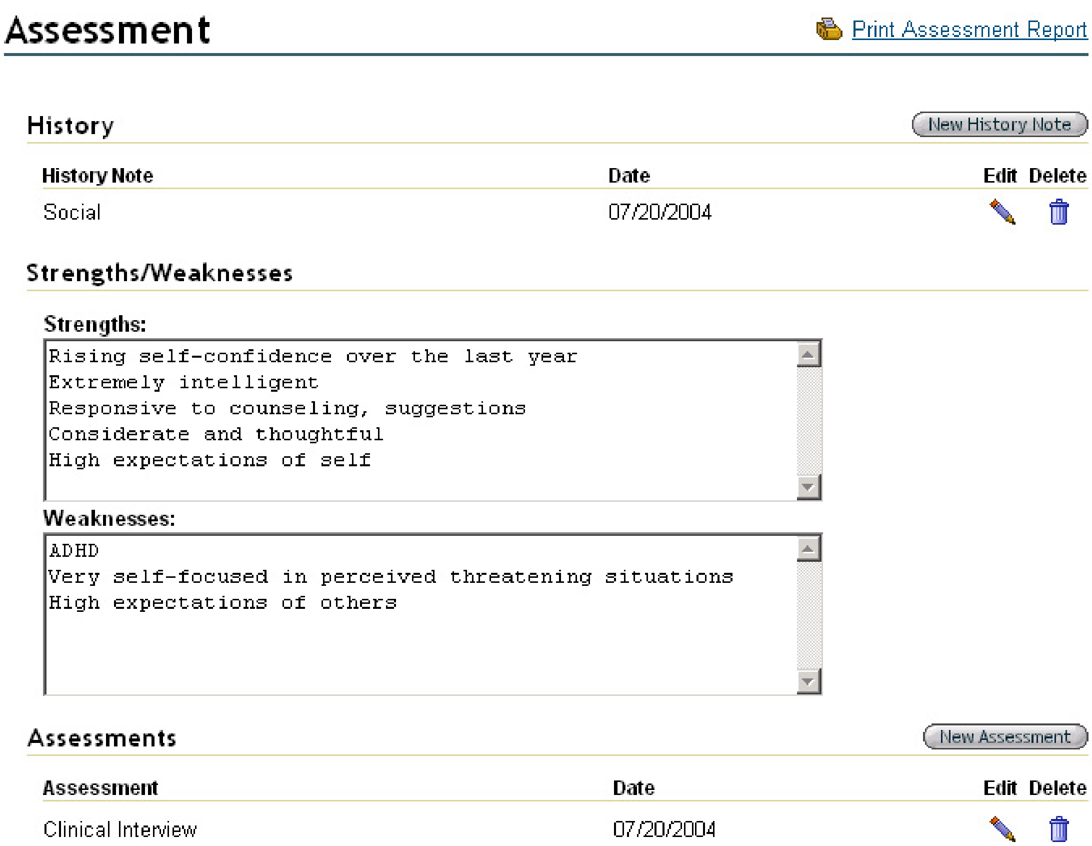
The approval reference field was designed to contain the name(s) of any of the several people who may be involved with the client and have authority to approve the proposed service. For instance, any therapy services would be authorized by a psychologist, psychiatrist, counselor or other clinician. Laundry services, on the other hand, would be authorized by the staff member in charge of verifying that such service is desired and will be paid for. Sports activities would perhaps need authorization from a staff member, a physician or a parent, depending upon the circumstances.



When done, click the Save button and the service will appear as an addition to the Approved Services screen. If you click the Summary link on the record navigation menu, these services will be displayed on the main portion of the page in the Approved Services section.

Assessment Summary
To see all assessments that have been performed for the specific client with which you are working, click on the Assessments link in the record navigation menu or on the section title within the main portion of the screen. The resulting screen contains a list of all services that have been approved and includes the number of service sessions, treatments, units, etc. that have been authorized for this client.

The resulting screen has three (3) general sections (History, Strengths/Weaknesses, Assessments) and other associated screens. The data listed for each of these items may be edited or deleted as needed, using the edit or delete icons .



Assessed History
The History section of the screen contains a listing of all history notes for this client, including the date the note was entered. To view an entire note, click on the edit icon. The original note entry screen will be displayed.

To add a new history note, click on the New History Note button New History Note . Enter the type of history. Family, social, developmental are three note type suggestions, but you may enter any type that is useful for your organization, including medical, psychological, cognitive, etc.

Type in the text of the note and click the Save button Save. The type of note and date entered will be displayed on the Assessments screen.

Assessed Strengths/Weaknesses
Any strengths and weaknesses that have been noted for this client will appear in the two memo fields on the Assessments screen. You may enter additional comments or edit the existing comments by simply typing in the field.

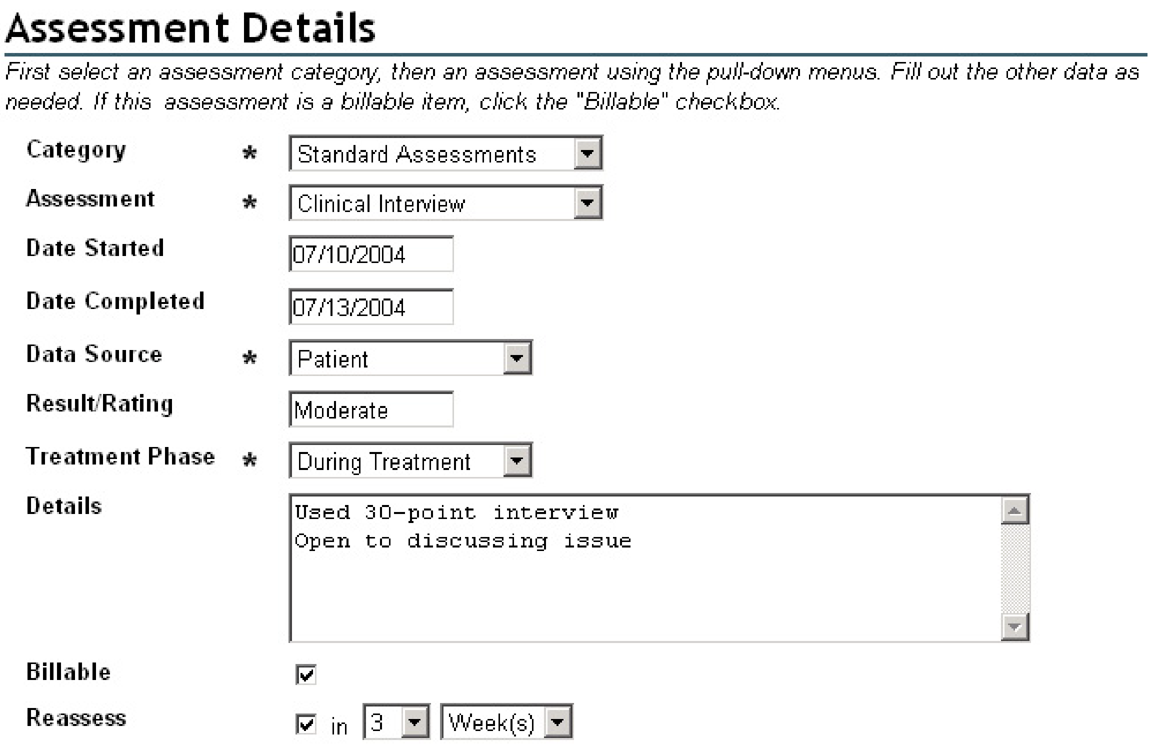
Assessments
All assessments that have been recorded for this client will appear on the lower portion of the screen, under the Assessments heading. To view a specific assessment, click on the edit icon. The original assessment details screen will be displayed.

To add a new assessment, click on the New Assessment button New Assessment . On the resulting screen, select an assessment category from the drop-down.

The assessment categories seen on this list were established in the Assessment Library. If you do not see the assessment category that you need for this client, go to the library and create the new category following the instructions under **Assessments Library**, above.

Select an assessment from the second drop-down.

The assessments seen on this list were established in the Assessment Library, as an assessment instrument under the selected assessment category. If you do not see the instrument that you need for this client, go to the library and create the new instrument under an appropriate assessment category, following the instructions under **Adding New Assessment Instruments**, above.


Assessment Details

First select an assessment category, then an assessment using the pull-down menus. Fill out the other data as needed. If this assessment is a billable item, click the "Billable" checkbox.

Category	*	Standard Assessments
Assessment	*	Clinical Interview
Date Started		07/10/2004
Date Completed		07/13/2004
Data Source	*	Patient
Result/Rating		Moderate
Treatment Phase	*	During Treatment
Details		Used 30-point interview Open to discussing issue
Billable		☑
Reassess		☑ in 3 Week(s)

Enter the date the assessment was started and the date completed. From the Data Source drop-down, select the type of person who supplied the information gathered in this assessment. The choices are Patient, Family Member, Parent/Guardian, Significant Other, Spouse/Partner and Teacher(s).

Enter a result or rating into the appropriate field, then select the treatment phase during which the assessment was taken. The options available on the drop-down are Pre-Treatment, During Treatment, Post-Treatment and Follow-Up.

Use the large memo field to record all details of the assessment. Check the box below the memo if this is a billable assessment and check the second box if a reassessment is needed. Using the numbered drop-down, select a reassessment quantifier, from 1 to 20. Select an interval from the drop-down containing Day(s), Week(s) and Month(s).

When you are satisfied with the entries, remember to click the Save button Save . The assessment will appear as an addition to the Assessment screen. If you click the Summary link on the record navigation menu, these services will be displayed on the main portion of the page in the Approved Services section, labeled by instrument title and date.

Sessions Summary
To see all treatment sessions that have been conducted for the specific client with which you are working, click on the Sessions link in the record navigation menu or on the section title within the main portion of the screen. The resulting screen contains a list of all sessions that have been recorded and includes the approach used for each.

Sessions

Print Sessions Summary   New Session

Date	Approach	Edit	Delete
04/09/2004	Cognitive Behavioral Therapy		
04/16/2004	Cognitive Behavioral Therapy		
04/23/2004	Cognitive Behavioral Therapy		
04/30/2004	Family or Conjoint Therapy		
05/07/2004	Family or Conjoint Therapy		
05/14/2004	Family or Conjoint Therapy		

The edit and delete icons may be used to change any session data or to remove a session entirely from the client's record.

To add a new session to this list, click on the New Session button New Session. On the resulting screen, seen below, enter the date of the session and the start and end time. Select a progress rating from the drop-down. The choices are: Significant Regression, Completed, Regression, Some Progress and No Change.

Select a modality from the Modality drop-down.

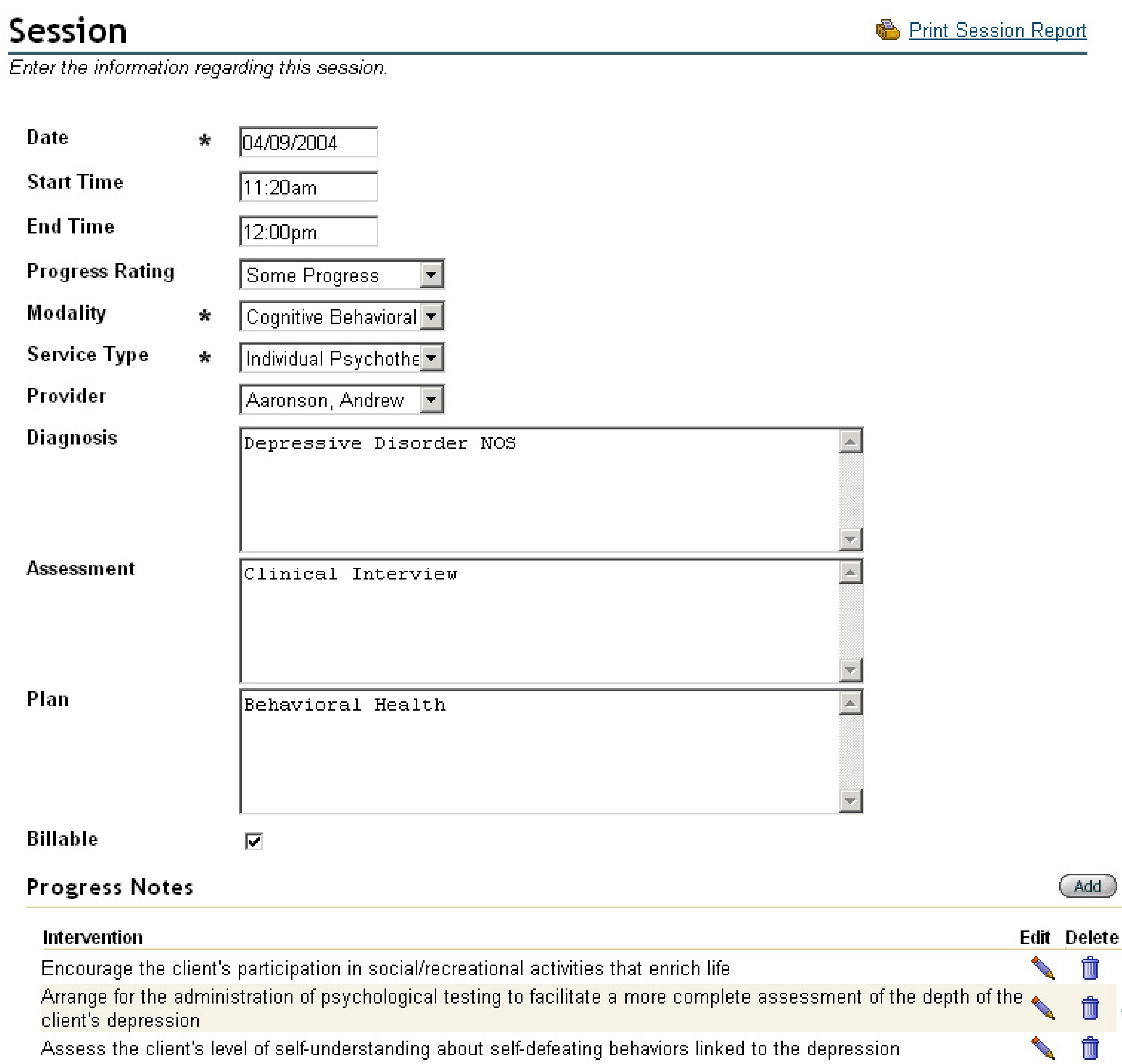
The modalities seen on this list were established in the Modality Library. If you do not see the modality that you need for this client, go to the library and create the new modality following the instructions under **Modality Library**, above.

Select a service type from the Service Type drop-down.

The service types seen on this list were established in the Service Items Library. If you do not see the service type that you need for this client, go to the library and create the new type following the instructions under **Service Plan Library**, above.
The Provider drop-down displays all the individuals who have a relationship with this client. Select a name from the list.

The individuals seen on the provider drop-down list were established using the Relationships link on the client's Record Summary. If you do not see the individual that you need to assign to this client, go to the client's Record Summary and click the Relationships link on the record navigation menu. Establish a secondary relationship between the client and the provider, following the instructions under **Creating Relationships** in **Staff Manager**. Alternately, you may go to the Record Summary of the individual you wish to make a provider and establish a primary relationship between the provider and the client using the same instructions.

Enter any notes needed in the Diagnosis, Assessment and Plan memo fields. If this is a billable session, click the Billable checkbox.



Progress Notes
All progress notes entered for this client are visible at the bottom of the screen, listed under their intervention name. To change any note, click the associated edit icon . To entirely remove the note from the client's record, click the associated delete icon . To add a new progress note, click the Add button Add .

On the resulting screen, see example above, select a plan from the Service Plan drop-down. Select a problem from the Issue drop-down. Choose an objective from the Objective drop-down. Choose an intervention from the Intervention drop-down. When completed, click the Save button Save.

The service plans, issues, objectives and interventions seen on these lists were established in the Service Plan Library. If you do not see the plans, issues, objectives and interventions that you need for this client, go to the library and create the new items following the instructions under **Service Plan Library**, above.

The Session screen will reappear, displaying the new progress note. Add as many progress notes as needed and click the Save button at the bottom of the Session screen when you are satisfied with the result. This session will be summarized on the Sessions list screen and the Record Summary screen, labeled with the date of the session and the approach (modality).

Service Plans Summary
The Service Plans section of the Service Summary displays all the plans that have been selected for the client with which you are working. To select a plan to add to this client's treatment, click on the Service Plans title on the record navigation menu or on the section title in the main portion of the screen. All of the available plans from your library will be listed on the resulting screen.

Hammond, Harry Service Plans

Plan Name		Edit	Review/Sign
Behavioral Health	Completed and Signed		
Adolescent Library	Not Started		
Addiction Library	Pending Review/Signature		

Any plans that have been selected for the client will have "Pending Review/Signature" or "Completed and Signed" under the Status column. Any plans that have not been selected for the client will display "Not Started" in the Status column.

- **Pending Review/Signature** means that a plan has been created or in the process of being created for the client, but has not been finalized.

- **Completed and Signed** means that an authorized person has reviewed the final plan problems, definitions, goals, objectives and interventions, has approved them for this client and signed the appropriate documents.

To start one of the plans for the client, click on the edit icon in the Edit column opposite the desired plan name. Or if a plan has been selected and you desire to work with it, click on its underlined name on the Service Summary page.

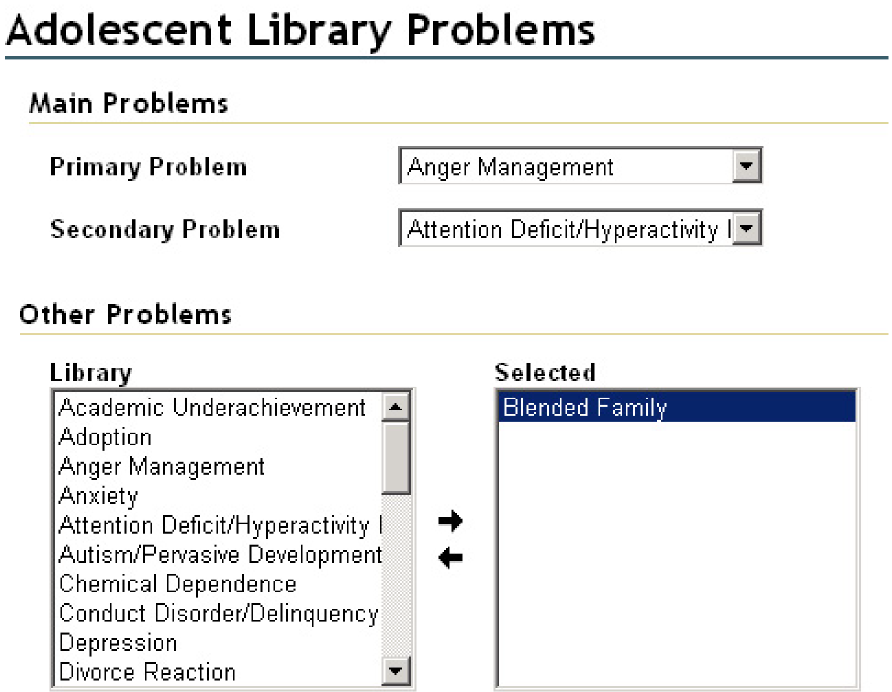
In both cases the service library screen will open. In the example below, the Behavioral Health Plan was selected for the client. All of the problems addressed by the Behavioral Health Plan are displayed, along with links to their definitions, long-term goals, short-term objectives and therapeutic interventions.

Hammond, Harry Behavioral Health

Techniques Diagnosis Add/Remove Problems

Problem	Behavioral Definitions	Long-Term Goals	Short-Term Objectives/Therapeutic Interventions
Bi-Polar	Behavioral Definitions	Long-Term Goals	Short-Term Objectives/Therapeutic Interventions
Depression	Behavioral Definitions	Long-Term Goals	Short-Term Objectives/Therapeutic Interventions
Anxiety	Behavioral Definitions	Long-Term Goals	Short-Term Objectives/Therapeutic Interventions

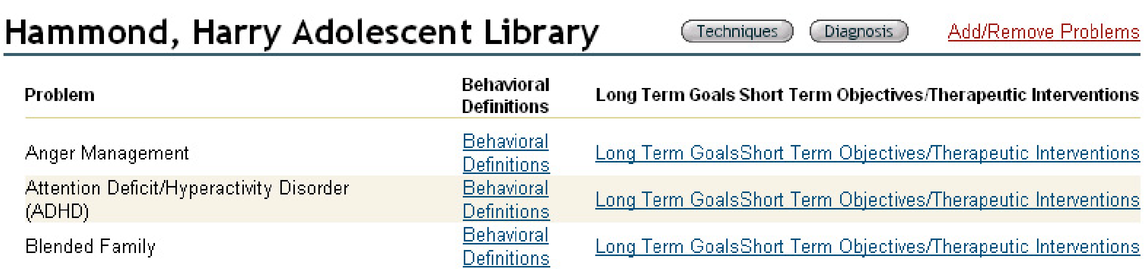
Problems
To add (or remove) a problem to this client's list, click the Add/Remove Problems link. The resulting screen, shown below from the Adolescent Library, displays in each of the three fields all problems contained in the library.



Choose a primary problem from the first drop-down. Select a secondary problem, if necessary, from the second drop-down. If more problems exist, highlight an item from the left Library field. Click on the right arrow and the problem will be entered into the Selected field on the right. If you want to unselect a problem from the Selected field, highlight the unwanted item and click the left arrow . The problem will move back to the Library field.

Repeat this procedure until all problems are shown. Every problem that will be addressed by your organization or that may affect your treatment of the client should be listed in one of the three fields Primary Problem, Secondary Problem and Selected.

When you are satisfied that all the client's problems have been listed, click the Save button Save . The library screen will repaint, as seen below in the client's Adolescent Library screen and added to their service record.

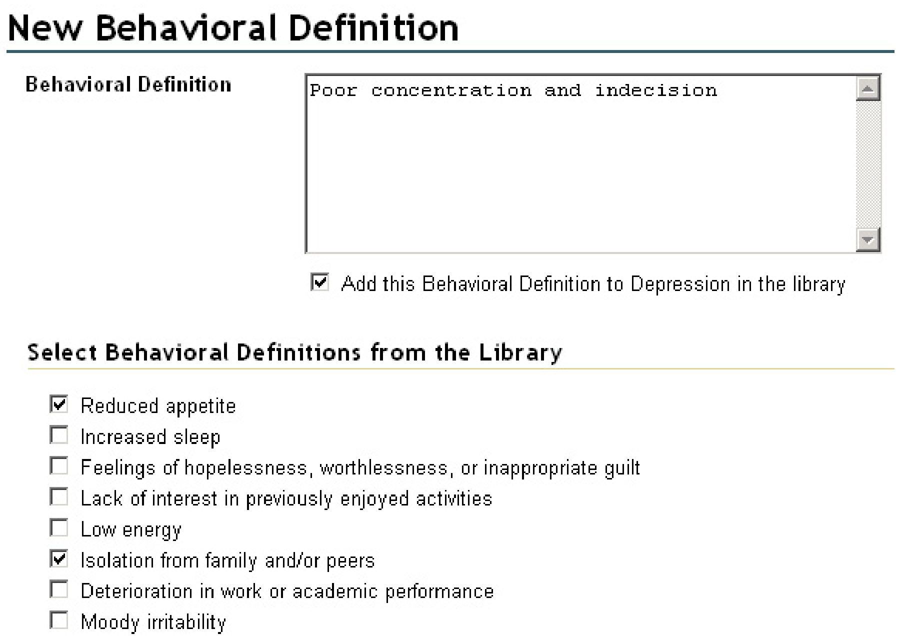


Behavioral Definitions

To view, add to or modify any of the Behavioral Definitions, Long-Term Goals or Short-Term Objectives/Therapeutic Interventions, click on the underlined link associated with the specific problem.

To select a behavioral definition for this specific client's treatment plan (or to view, add or modify a definition) click on the underlined Behavioral Definitions link. The definitions screen, seen below, displays all of the definitions that have been selected for this client. To add a new definition to the list for this client, click on the New Behavioral Definition link.

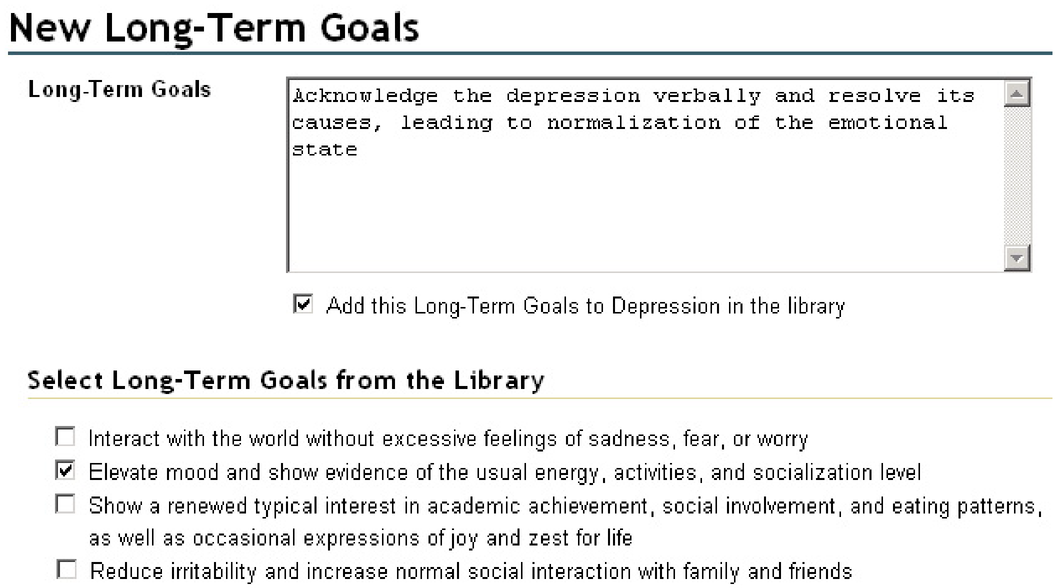
On the resulting screen, you may devise a new definition, enter it into the memo field and choose whether or not this definition will also be added to the selected plan and problem in the Service Plans Library. Alternately, you may click multiple checkboxes associated with existing definitions to add them to the client's definitions list. When the list is complete, click the Done button and the definitions will be saved in the client's library screen and added to his/her service record.



Long-Term Goals
To view, add to or modify any of the Behavioral Definitions, Long-Term Goals or Short-Term Objectives/Therapeutic Interventions, click on the underlined link associated with the specific problem.

To select a long-term goal for this specific client's treatment plan (or to view, add or modify a goal) click on the underlined Long-Term Goals link. The goals screen, seen below, displays all of the goals that have been selected for this client. To add a new goal to the list for this client, click on the New Long-Term Goals link.

On the resulting screen, seen below, you may devise a new goal, enter it into the memo field and choose whether or not this goal will also be added to the selected plan and problem in the Service Plans Library. Alternately, you may click multiple checkboxes associated with existing goals to add them to the client's goal list. When the list is complete, click the Done button and the goals will be saved in the client's library screen and added to his/her service record.

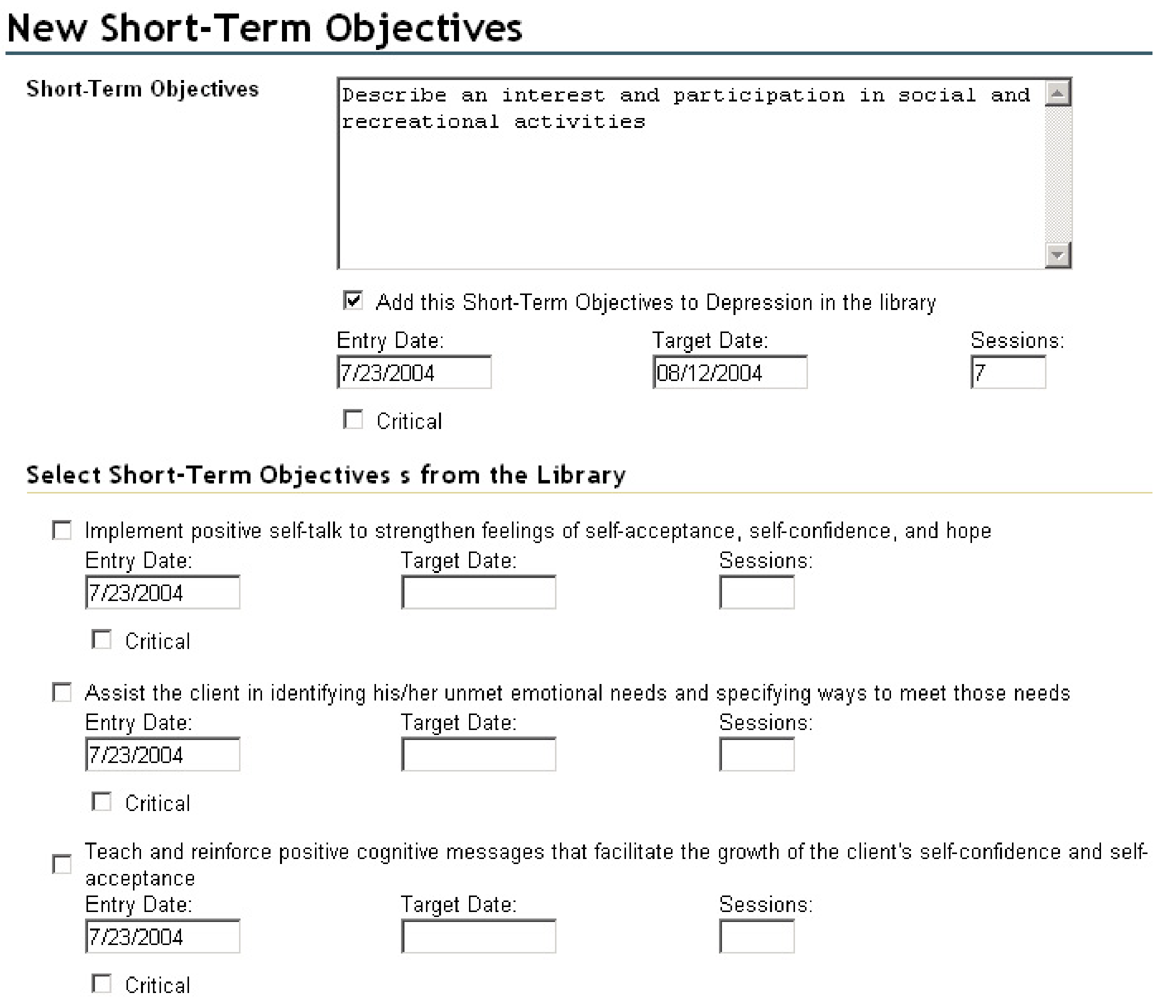


Short-Term Objective/Therapeutic Interventions
To view, add to or modify any of the Behavioral Definitions, Long-Term Goals or Short-Term Objectives/Therapeutic Interventions, click on the underlined link associated with the specific problem.

To select a short-term objective for this specific client's treatment plan (or to view, add or modify an objective) click on the underlined Short-Term Objectives link. The objective screen, seen below, displays all of the objectives that have been selected for this client. To add a new objective to the list for this client, click on the New Short-Term Objectives link.

On the resulting screen, seen below, you may devise a new objective, enter it into the memo field and choose whether or not this goal will also be added to the selected plan and problem in the Service Plans Library. Additionally, there are fields for the date of entry for this objective, the target date for completion, the number of sessions projected to achieve this objective and whether or not it is a critical objective.

Alternately, you may click multiple checkboxes associated with existing objectives, fill in the appropriate fields and click Save to add them to the client's objectives list. When the list is complete, click the Done button Done and the objectives will be saved in the client's library screen and added to his/her service record.



New Short-Term Objectives

Short-Term Objectives

Describe an interest and participation in social and recreational activities

☑ Add this Short-Term Objectives to Depression in the library

Entry Date: 7/23/2004 Target Date: 08/12/2004 Sessions: 7

☐ Critical

Select Short-Term Objectives s from the Library

☐ Implement positive self-talk to strengthen feelings of self-acceptance, self-confidence, and hope

Entry Date: 7/23/2004 Target Date: Sessions:

☐ Critical

☐ Assist the client in identifying his/her unmet emotional needs and specifying ways to meet those needs

Entry Date: 7/23/2004 Target Date: Sessions:

☐ Critical

☐ Teach and reinforce positive cognitive messages that facilitate the growth of the client's self-confidence and self-acceptance

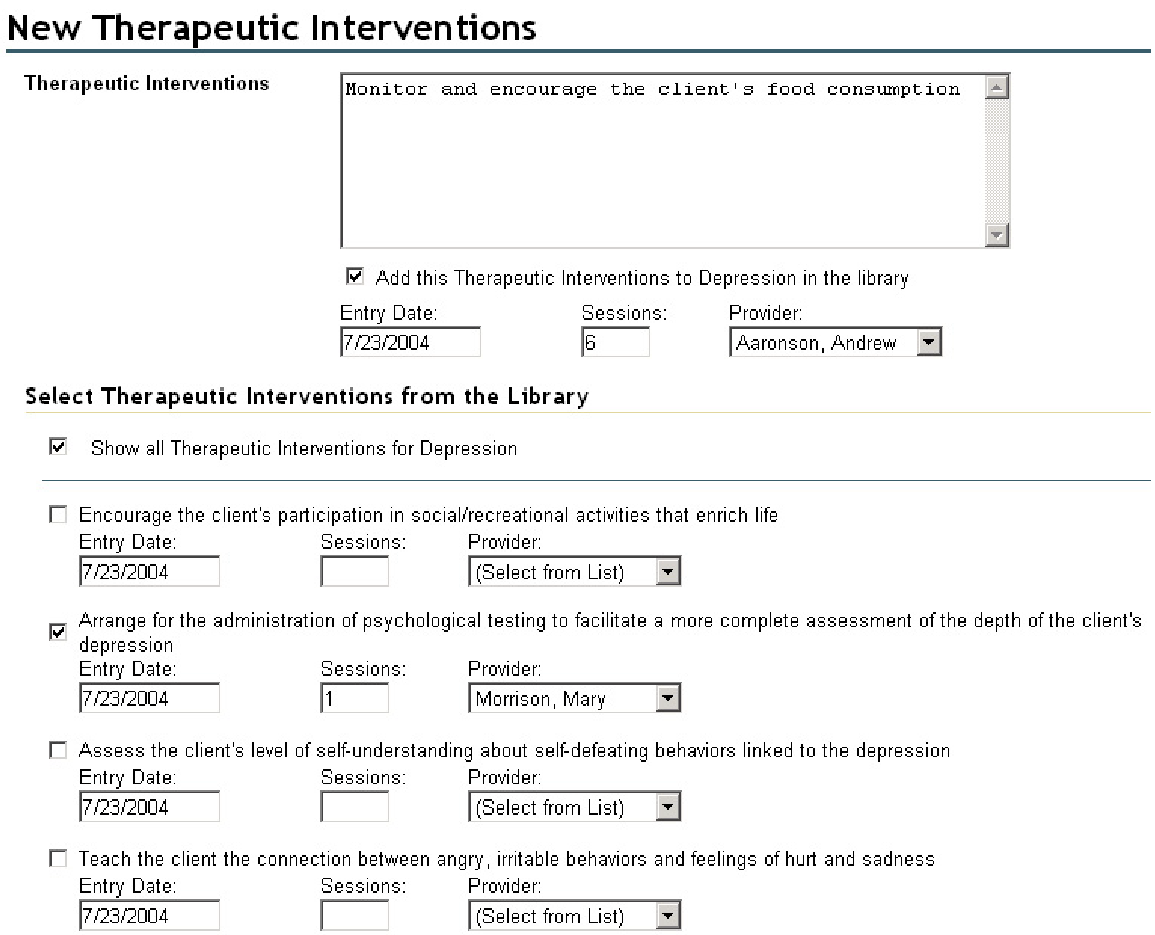
Entry Date: 7/23/2004 Target Date: Sessions:

☐ Critical

Adding Interventions to Objectives

To add an intervention to a client's objectives, start from the Short-Term Objectives list screen, which will display all of the client's selected objectives and show an edit link (beside the edit icon) associated with each objective. Click on the edit link to retrieve the Interventions screen.

On the resulting screen, seen below, you may devise a new intervention, enter it into the memo field and choose whether or not this intervention will also be added to the selected plan and problem in the Service Plans Library.



Additionally, there are fields for the date of entry for this intervention, the number of sessions projected to perform this intervention and a drop-down for selecting the provider for this intervention.

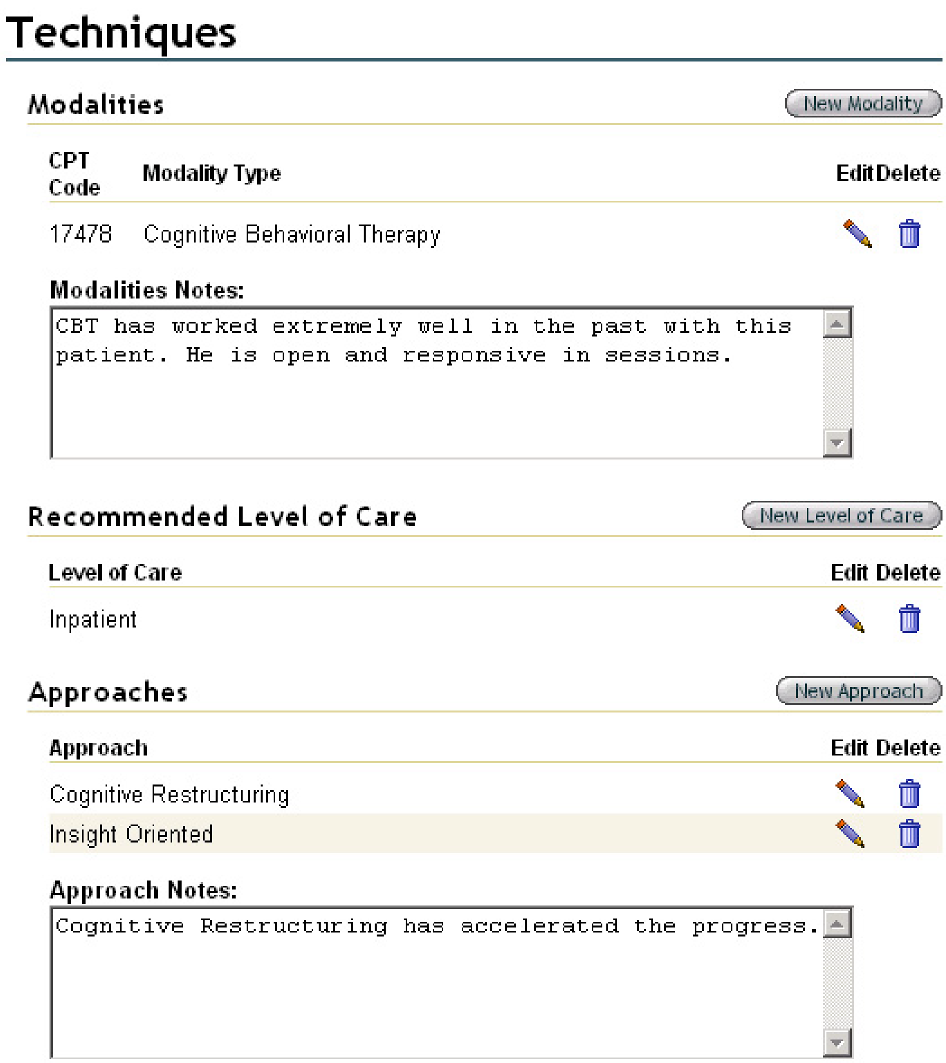
The individuals seen on the provider drop-down list were established using the Relationships link on the client's Record Summary. If you do not see the individual that you need to assign to this client, go to the client's Record Summary and click the Relationships link on the record navigation menu. Establish a secondary relationship between the client and the provider, following the instructions under **Staff Manager**. Alternately, you may go to the Record Summary of the individual you wish to make a provider and establish a primary relationship between the provider and the client using the same instructions.

In the Select Therapeutic Interventions from the Library section, you may click the Show all Therapeutic Interventions box to see all the interventions in the library that are associated with this problem. When the screen repaints, you may make multiple selections among the existing interventions, fill in the appropriate fields and click the Save to add them to the client's interventions list.

Be sure to click the checkbox next to each intervention you intend to add to the client's plan. Doing so will allow the entered date, session and provider to be recorded for the client. When the list is complete, click the Done button and the objectives will be saved in the client's library screen, shown below, and added to his/her service record.

Adding Techniques to a Client Plan

To add a modality to a client's service plan, use the Techniques button on the client's library screen. The resulting screen, seen below, accesses the Modality Library.



To add a modality for this client's treatment, click the New Modality button . On the resulting screen, seen below, you may select any modality is part of the Modality Library for this problem using the Modality Type drop-down.

The modalities seen on this list were established in the Modality Library. If you do not see the modality that you need for this client, go to the library and create the new modality following the instructions under **Modality Library**, above.

The CPT code for this modality is automatically populated in the code field. Select a frequency number (from 1 to 10) in the drop-down. Choose a modifier from the next drop-down. The choices are Daily, Weekly, Monthly, Bi-Monthly or Quarterly. Select a provider from the drop-down.

The individuals seen on the provider drop-down list were established using the Relationships link on the client's Record Summary. If you do not see the individual that you need to assign to this client, go to the client's Record Summary and click the Relationships link on the record navigation menu. Establish a secondary relationship between the client and the provider, following the instructions under **Staff Manager**. Alternately, you may go to the Record Summary of the individual you wish to make a provider and establish a primary relationship between the provider and the client using the same instructions.

When you are satisfied with the structure of this new modality, click the Save button and you will be returned to the Techniques screen. You may click the New Modality button again and add as many modalities as needed.

Level of Care
To recommend a level of care appropriate for this client, click on the New Level of Care button . The resulting screen allows you to select a level from the drop-down. The choices are Day Treatment, In-Patient, Intensive Out-Patient or Out-Patient.

Also check any modifiers for this care level from the three choices in the checkboxes below the drop-down, Least restrictive alternative, Patient agrees with this level of care and This level of care is available. When you are satisfied with the selections, click the Save button and the care level will display on the Techniques screen.

Approaches
Within any given modality are several approaches that may be used with a client. To add a new approach to the client's treatment, click the New Approach button .

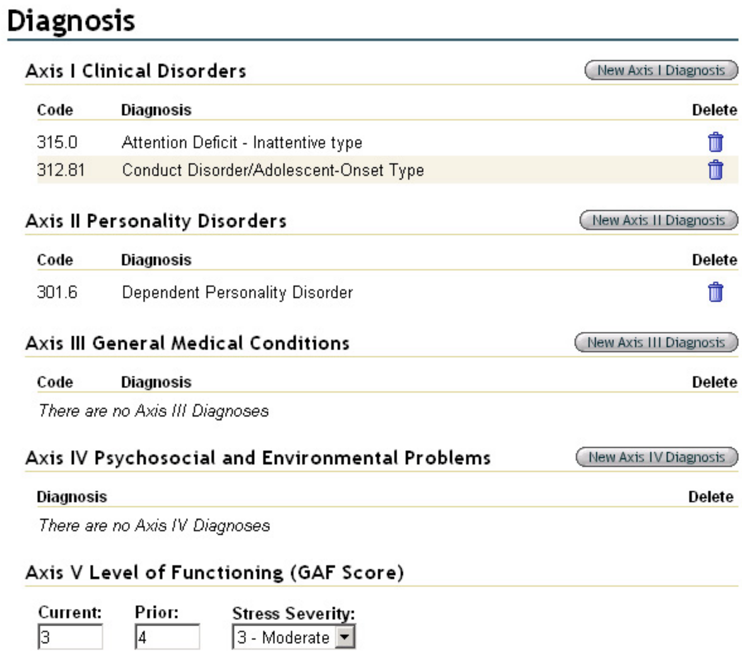
On the resulting screen, seen below, new approaches (that may be applied to any modality) are available from the drop-down. The choices are Behavioral Techniques, Biofeedback/Relaxation Training, Cognitive Restructuring, Confrontive, Insight Oriented, Solution-Oriented Brief Therapy, Supportive Maintenance or Symptom Focused Education.

Click on the selected approach choice, then on the Save button. The approach will be added to the Techniques screen.

When you are satisfied with all elements of the Techniques screen, click the Save button and the new techniques will be saved in the client's library screen, shown below, and added to his/her service record.

Adding a Diagnosis to a Client Plan
Next to the Techniques button on the client's library screen is the Diagnosis button , which allows you to add a diagnosis to the client's plan and records. Click the Diagnosis button and a screen with Axes I to V will display. Any diagnoses that have been made for this client will be shown on the Diagnosis screen, seen below.

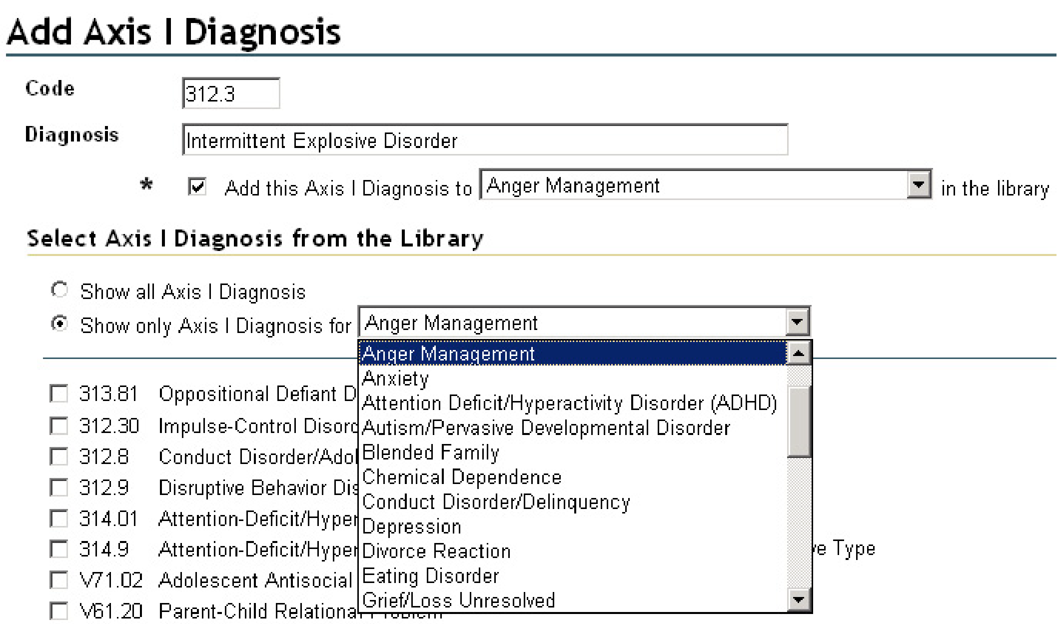
You may add as many Axis I, II, III or IV diagnoses as needed or none if certain Axes do not apply to the client's condition.



New Axis Diagnosis

To add a new diagnosis to any Axis (except Axis V), click on the New Axis button 

associated with the desired Axis. For any Axis you choose, the screen will present the same format and functioning, seen below for an Axis I Diagnosis.



The screen is divided into two sections. The first section allows you to devise a new diagnosis for this client and also choose whether or not to add it to the Service Plan Library. If you do wish to make this new diagnosis a part of the library, select a problem from the drop-down to which this diagnosis will apply.

Under the Select Axis Diagnosis from the Library heading, you may select an existing diagnosis from the library to be added to the client instead of devising a new one or in addition to the new one you have devised above.

By default, all the diagnoses for the selected Axis that are in the library will be listed. If you wish to limit the choices displayed on the screen to only those related to a specific problem, click the second radio button and choose a problem from the drop-down, seen opened above. When the screen repaints, you will be able to select from all the diagnoses for this problem that exist in the library by using the associated checkboxes.

When you are satisfied with all selections on the Add New Diagnosis screen, click the Save button and the new diagnoses will be saved in the client's Diagnosis screen and added to his/her service record.

As mentioned, every Axis Diagnosis screen functions in the same way, but with data specific to the Axis with which you are working, with the exception of the Axis V Level of Functioning score.

New GAF Score

A new Level of Functioning (GAF Score) can be entered directly on the Diagnosis screen, without the use of a 'new' button. The Level of Functioning section will retain the last score that was entered in the Prior field, but allow you to type in a new score in the Current field and make a new selection from the Stress Severity field.

When you are satisfied with all elements of the Diagnosis screen, including Axis V, click the Save button Save and the new diagnoses will be saved in the client's library screen and added to his/her service record.

Plan Review and Signature

When you have finished the process of selecting or creating all elements of the service plan for the specific client, the appropriate staff member, clinician, parent, etc. will need to review and sign the plan. From the client's Service Plans screen, click the edit icon under the Review/Sign column.

On the resulting screen, an entire plan within the Adolescent Library has been devised for the client. By selecting the Printer Friendly Version link, the appropriate individuals can read and sign the paper document. The paper version should be read, signed and filed in accordance with your organization's procedures.

Hammond, Harry Adolescent Library

Printer Friendly Version

Primary Problem: Anxiety

Behavioral Definition

- Excessive anxiety, worry, or fear that markedly exceeds the normal level for the client's stage of development.
- Hypervigilance, such as feeling constantly on edge, concentration difficulties, trouble falling or staying asleep, and a general state of irritability.
- Excessive anxiety or worry due to parent's threat of abandonment, overuse of guilt, denial of autonomy and status, friction between parents, or interference with physical activity.

Long Term Goal

- Stabilize the anxiety level while increasing the ability to function on a daily basis.
- Resolve the key issue that is the source of the anxiety or fear.

Short Term Objective

- Identify areas of conflict that precipitate anxiety.
  Entry Date: 07/29/2004 Target Date: 08/01/2004 Sessions: 2 Critical?: false
  Therapeutic Intervention
  - Assist the client in working toward resolution (e.g., using problem solving, assertiveness, acceptance, cognitive restructuring) of key past and present conflicts.
    Entry Date: 07/29/2004 Sessions: 0 Provider: Aaronson, Andrew
  - Ask the client to develop a list of key past and present conflicts within the family and with peers that trigger worry. Process this list with the therapist.
    Entry Date: 07/29/2004 Sessions: 2 Provider: Aaronson, Andrew
- Implement positive self-talk to reduce or eliminate anxiety.
  Entry Date: 07/29/2004 Target Date: 08/10/2004 Sessions: 4 Critical?: false
  Therapeutic Intervention
  - Help the client develop reality-based cognitive messages that will increase self-confidence in coping with fears and anxieties.
    Entry Date: 07/29/2004 Sessions: 4 Provider: Aaronson, Andrew
- Implement appropriate relaxation activities to decrease the level of anxiety.
  Entry Date: 07/29/2004 Target Date: 08/30/2004 Sessions: 0 Critical?: false
  Therapeutic Intervention
  - Teach deep muscle relaxation, deep breathing, and positive imagery as anxiety coping skills.
    Entry Date: 07/29/2004 Sessions: 1 Provider: Aaronson, Andrew
- Complete a medication evaluation.
  Entry Date: 07/29/2004 Target Date: 07/30/2004 Sessions: 1 Critical?: false
  Therapeutic Intervention
  - Refer the client to a psychiatrist for a medication consultation; confer with the psychiatrist before and upon the completion of the evaluation.
    Entry Date: 07/29/2004 Sessions: 1 Provider: Aaronson, Andrew

Secondary Problem: Attention Deficit/Hyperactivity Disorder (ADHD)

Behavioral Definition

- Low self-esteem and poor social skills.
- Gives impression that he/she is not listening well.
- Susceptibility to distraction by extraneous stimuli and internal thoughts.
- Poor organizational skills as demonstrated by forgetfulness, inattention to details, and losing things necessary for tasks.

Long Term Goal

- Sustain attention and concentration for consistently longer periods of time.
- Improve self-esteem.
- Regularly take medication as prescribed to decrease impulsivity, hyperactivity, and distractibility.
- Develop positive social skills to help maintain lasting peer friendships.

Short Term Objective

- Complete psychological testing to confirm the diagnosis of ADHD and/or rule out emotional factors.
  Entry Date: 07/29/2004 Target Date: 08/06/2004 Sessions: 1 Critical?: false
  Therapeutic Intervention
  - Arrange for psychological testing to confirm the presence of ADHD and/or rule out emotional problems that may be contributing to the client's inattentiveness, impulsivity, and hyperactivity; give feedback to the client and his/her parents regarding the testing results.
    Entry Date: 07/29/2004 Sessions: 1 Provider: Aaronson, Andrew
- Identify and implement effective problem-solving strategies.
  Entry Date: 07/29/2004 Target Date: 08/30/2004 Sessions: 2 Critical?: false
  Therapeutic Intervention
  - Utilize role playing and modeling to teach the client how to implement effective problem-solving techniques in his/her daily life (or assign the "Stop, Think and Act" exercise in the Brief Adolescent Therapy Homework Planner by Jongsma, Peterson, and McInnis).
    Entry Date: 07/29/2004 Sessions: 2 Provider: Aaronson, Andrew
  - Teach the client effective problem-solving skills (e.g., identifying the problem, brainstorming alternative solutions, selecting an option, implementing a course of action, and evaluating).
    Entry Date: 07/29/2004 Sessions: 1 Provider: Aaronson, Andrew
- Take prescribed medication as directed by the physician.
  Entry Date: 07/29/2004 Target Date: 07/30/2004 Sessions: 1 Critical?: false
  Therapeutic Intervention
  - Monitor the client for psychotropic medication prescription compliance, side effects, and effectiveness; consult with the prescribing physician at regular intervals.
    Entry Date: 07/29/2004 Sessions: 1 Provider: Aaronson, Andrew
  - Arrange for a medication evaluation for the client.
    Entry Date: 07/29/2004 Sessions: 1 Provider: Aaronson, Andrew
- Delay instant gratification in favor of achieving meaningful long-term goals.
  Entry Date: 07/29/2004 Target Date: 08/30/2004 Sessions: 3 Critical?: false
  Therapeutic Intervention
  - Teach the client mediational and self-control strategies (e.g., "stop, look, listen, and think") to delay the need for instant gratification and inhibit impulses to achieve more meaningful, longer-term goals.
    Entry Date: 07/29/2004 Sessions: 4 Provider: Aaronson, Andrew

Add a Signature on File

Signature	Date	Type
Aaronson, Andrew	07/10/2004	On File

This illustration is a reduced-size facsimile of a plan page after signature. The printer-friendly version is standard type size, usually consisting of several readable pages. The screen version is standard screen font size and scrolls the entire document length, as needed.

For the purposes of online record keeping and reporting, the signing individual should also select the Add a Signature on File link. This link produces a screen where the signing individual enters his name, the date of the signature, the client's file number and clicks the Save button. As many signatures as needed may be appended to this document.

Answers4 Digital Signature

Enter the "Signature On File" information to sign this document.

I verify that I have received and filed a signed copy of this document for the person named below.

Signer	*	Aaronson, Andrew
Date Signed	*	07/15/2004
File Number		177604

Please be aware that by entering your name and the date, you (as the signing individual) are making a binding statement that you have received, signed and filed a legal copy of the treatment plan. Please regard this action as seriously as you would signing your name to any document.

Service Log Summary
The Service Log keeps an automated record of all treatment sessions that have been entered under the Sessions section. In the future, a billing module will operate from this section. At that time, the Service Log will display in one place all billable services and functions, including sessions, meals, housekeeping, etc. and any outsourced services your client receives.

Prognosis Summary
The Prognosis section allows you to enter a general prognosis and target date for this client and edit it at any time. Clicking on the Prognosis title in the record navigation menu or the section header brings the Prognosis screen into view.

Edit Prognosis

Prognosis Rating	*	Good
Projected Sessions		20
Projected End Date		12/30/2004
Critical Objectives Achieved	*	40 %

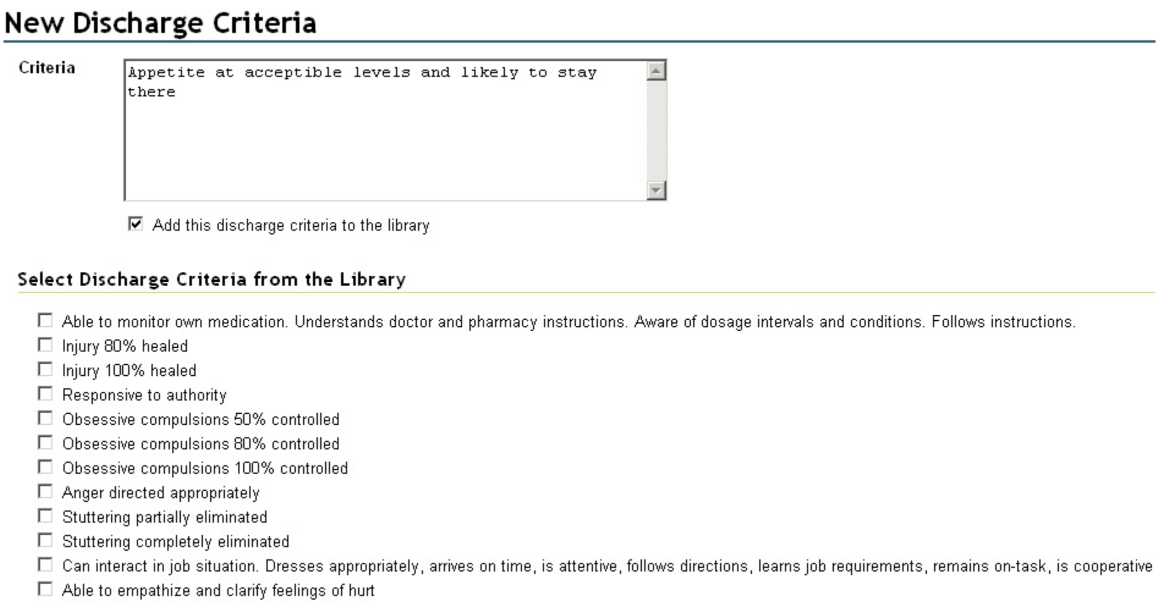
Select a rating from the drop-down. The choices are Excellent, Good, Fair, Guarded or Poor. Enter the number of estimated sessions and the end date envisioned for reaching the desired level of recovery. Looking at only the critical objectives that have been outlined for the client, enter the percentage of those that have been achieved at the present time. You will be able to update this number as progress is made.

When you are satisfied with all elements of the Prognosis screen, click the Save button and the prognoses will be saved in the client's service record.

Discharge Summary

For any client being served by your organization, the goal is eventual discharge from your program in an improved state. To see details of discharge criteria that have been selected for this client, click on the Discharge title in the record navigation menu or on the Discharge section header. A screen displaying all criteria and details will be displayed. You may change or remove any selected criteria by using the edit or delete icons associated with the criteria.

To create or add new discharge criteria for this client, click the New Discharge Criteria button. The resulting screen, seen below, is divided into two sections. The first section allows you to devise a new discharge criterion for this client and also choose whether or not to add it to the Discharge Criteria Library.



Under the Select Discharge Criteria from the Library heading, you may select an existing discharge criterion from the library to be added to the client instead of devising a new one or in addition to the new one you have devised above. Select any desired criteria by clicking one or more of the associated checkboxes.

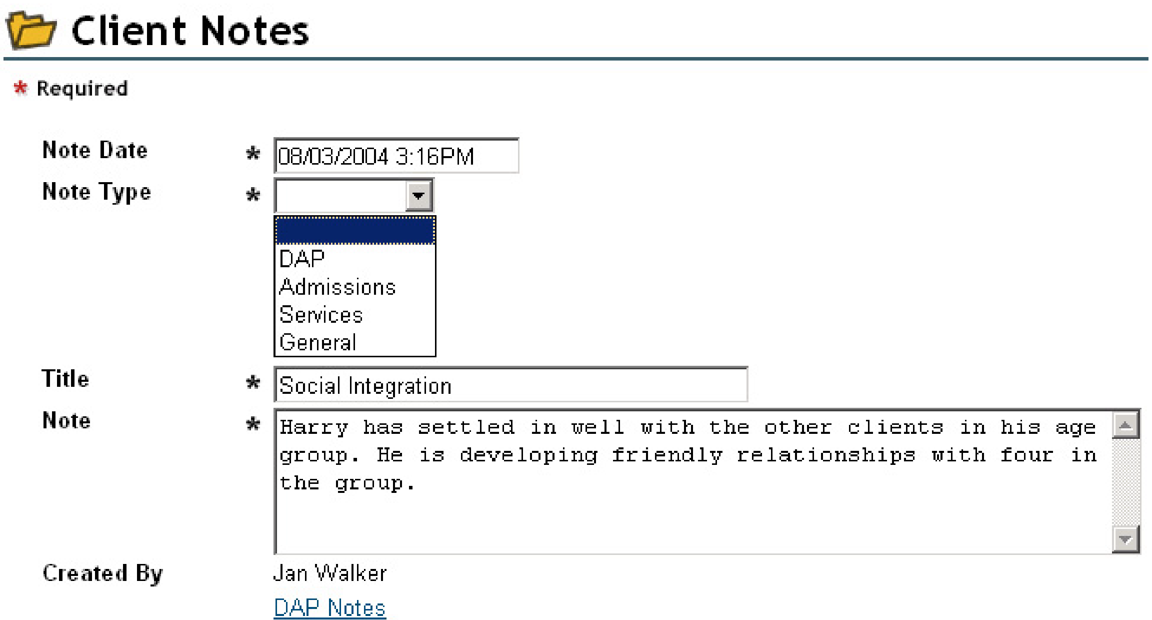
When you are satisfied with all selections on the New Discharge Criteria screen, click the Save button and the new criteria will be saved in the client's Discharge Criteria screen. When the Discharge Criteria screen is complete, click the Save button and the data will be added to his/her service record.

Client Notes Summary

Any client notes may be added to the notes summary, even if the information has been recorded elsewhere in the treatment plan. Regular notes or DAP notes may be added at any time.

To see all notes that have been added to the specific client with which you are working, click on the Client Notes link in the record navigation menu or on the section title within the main portion of the screen. The resulting screen contains a list of all notes that have been recorded, listed by date and note type. You may change or remove a note using the edit or delete icons .

To create a new note, click on the New Entry button New Entry . On the resulting screen, the date, time and creator of the note will be pre-populated in the correct fields. Select the Note Type from the drop-down, add a Title and type in the text of your note. Alternately, there is an active DAP Notes link at the bottom of the page, if Data Assessment Plan (DAP) notes are preferred. The name of the person creating the note (whoever is logged in) is automatically appended to the note.



If a DAP note is preferred, click the DAP Notes link at the bottom of the page. On the resulting screen, the date, time and creator of the note will be pre-populated in the correct fields. Select the Note Type from the drop-down, add a Title and type in the text for the Data, Assessment and Plan fields. The name of the person creating the note (whoever is logged in) is automatically appended to the note. If a regular client note is preferred, click on the Regular Client Notes link at the bottom of the page. See example of DAP notes under **Group Notes** below.

Group Notes

Generally, the individuals who have been organized into groups have some or many things in common. Keeping notes about common issues is important, however, storing a repeated note in the record of each individual member of the group is cumbersome and time-consuming. The Group Notes function allows you to store the same note to each record in the group with a single click on the Save button.

To create a note, start from the Group Notes screen, seen below. This screen contains the names of all groups that have previously been created. You may view the existing members of each group (who will have this note attached to their records) by clicking on the members icon . (To create a group and add members to it see **Create a New Group** and **Adding Group Members** in **Total Operations Management**.) Click the underlined name of the group to which you wish to add a note.

Group Notes

Edit Page

Using the Group Notes screen the user can add a note to a group and the system adds the note to each of the individuals in that group. Select a group to add a note.

Name	Description	Members
Autism	All of our clients diagnosed with Autism	
Speech	All those needing speech therapy	
Bi-Polar	Bi-Polar exploratory group	
Handicapped	All handicapped	

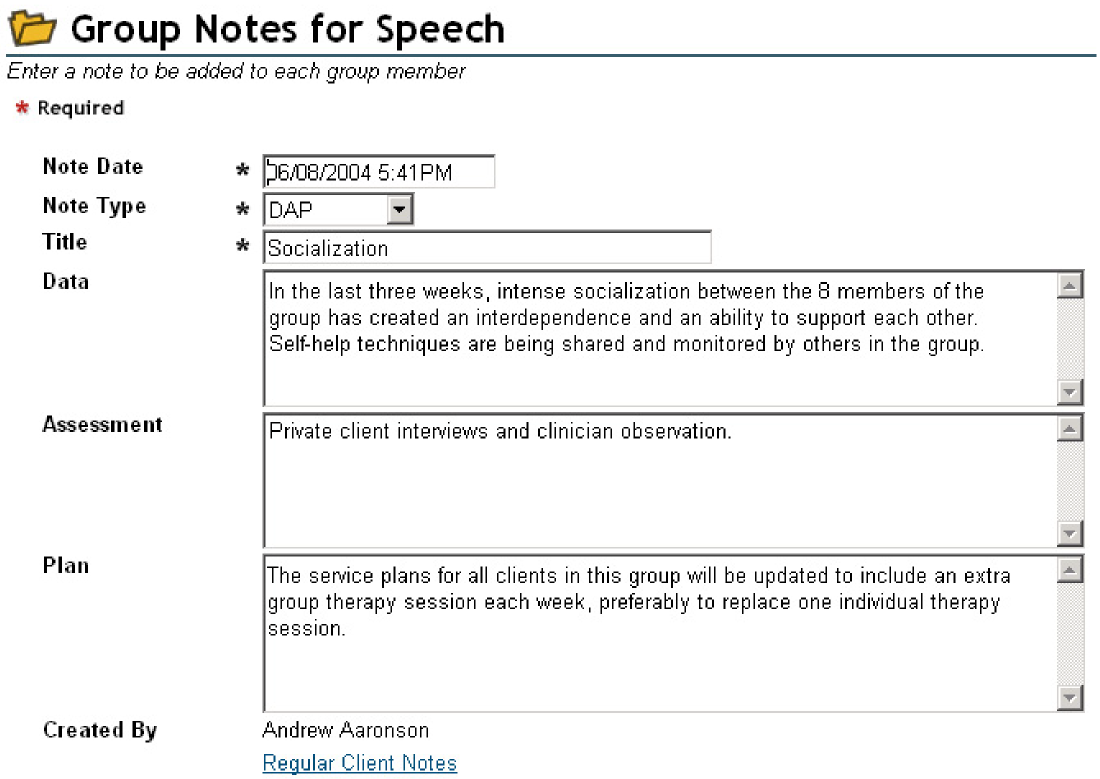
The note entry screen will appear, as in the regular notes example in **Client Notes** above. The date, time and creator of the note will be pre-populated in the correct fields. You select the Note Type from the drop-down, add a Title and type in the text of your note. Alternately, there is an active DAP Notes link at the bottom of the page, if Data Assessment Plan (DAP) notes are preferred. The name of the person creating the note (whoever is logged in) is automatically appended to the note.

The DAP (Data Assessment Plan) Notes link takes you to a similar page with more extensive formatting that contains elements related to the Service Plan libraries, as seen below.

The Note Date field is pre-populated with the date and time of the note. A Note Type, either DAP, Admissions, Services or General, can be selected from the drop-down. Enter a title for the note. There are three large memo areas designed for:

- **Data** - Problem/diagnosis, social/family history, subjective findings, objective findings and description of session content and process
- **Assessment** - Intervention results, therapist hypotheses, interpretation of client behavior, diagnostic impressions and goals
- **Plan** - review or revision of treatment plan

The name of the note creator (whoever is logged in) is automatically appended to the note and a link, Regular Client Notes, is provided to return to the regular notes screen, if needed. As always, remember to click the Save button when done.



Office Manager

Clicking the Office Manager link retrieves a page with thumbnails of the calendar and files, side by side, as seen below.

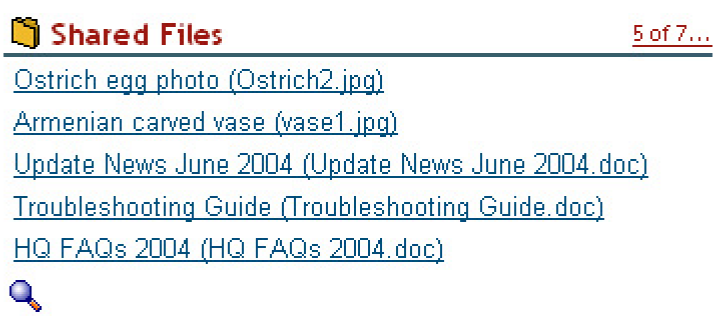
Scheduling Calendar

The event calendar stored in the Office Manager contains all the events that have been entered by and for every person, organization-wide. This allows for a central scheduling individual, one who has all the information necessary to conveniently coordinate meetings and make appointments for individuals or groups.

The pagelet lists the next five (5) events for all schedules. To see the full calendar, as below, click on the Scheduling Calendar title or on the numbers to the right of the title.

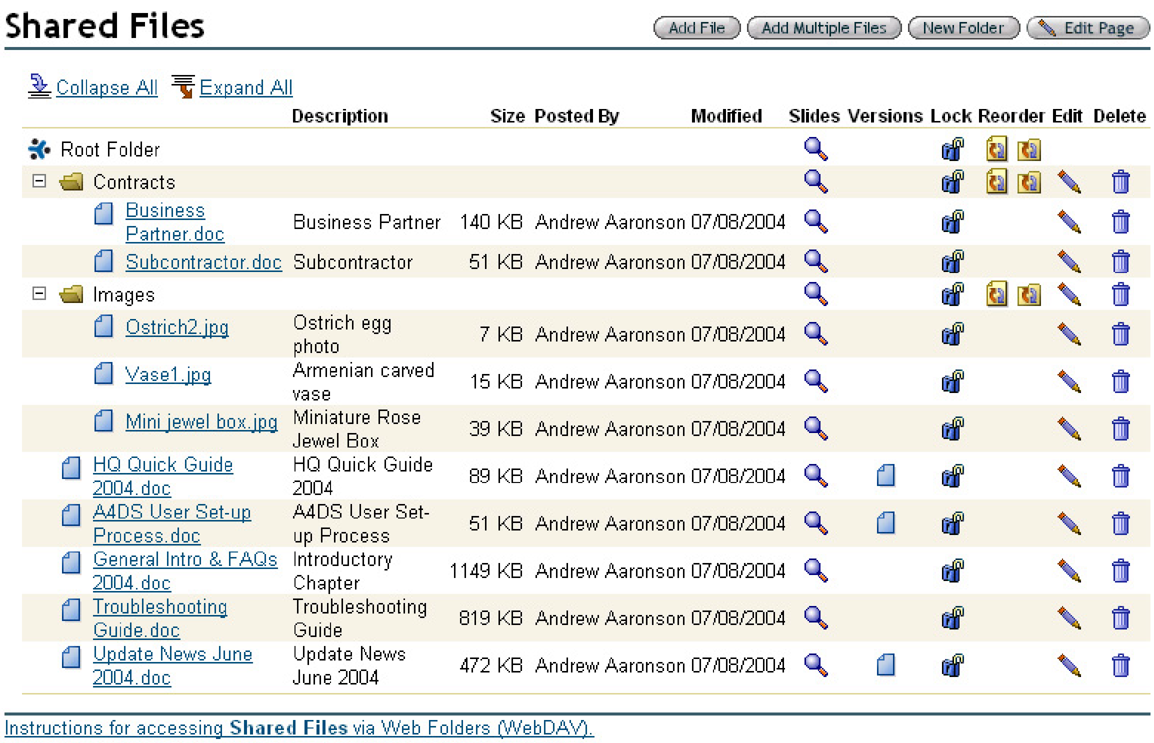
Shared Files

The Shared Files pagelet displays the five (5) most recently posted documents by title and document name. To directly access the document, click on the underlined title/name. To view the complete list of files, click on the Shared Files section title or the numbers to the right of it. To view any jpeg images or gif graphics contained in Shared Files in a slide show format, click on the magnifier icon at the bottom of the list (also see **Slideshow**, below).



Working with Shared Files

On the main Shared Files page, you will find a list and description of every file that has been uploaded through HQ™ for your organization, which also includes the size of the file, the name of the person who posted it and the date it was uploaded. These files can be accessed, edited, deleted, locked or unlocked, organized into folders and rearranged to meet your organization's information needs.


Shared Files

Add File | Add Multiple Files | New Folder | Edit Page

Collapse All Expand All

	Description	Size	Posted By	Modified	Slides	Versions	Lock	Reorder	Edit	Delete
Root Folder										
Contracts										
Business Partner.doc	Business Partner	140 KB	Andrew Aaronson	07/08/2004						
Subcontractor.doc	Subcontractor	51 KB	Andrew Aaronson	07/08/2004						
Images										
Ostrich2.jpg	Ostrich egg photo	7 KB	Andrew Aaronson	07/08/2004						
Vase1.jpg	Armenian carved vase	15 KB	Andrew Aaronson	07/08/2004						
Mini jewel box.jpg	Miniature Rose Jewel Box	39 KB	Andrew Aaronson	07/08/2004						
HQ Quick Guide 2004.doc	HQ Quick Guide 2004	89 KB	Andrew Aaronson	07/08/2004						
A4DS User Set-up Process.doc	A4DS User Set-up Process	51 KB	Andrew Aaronson	07/08/2004						
General Intro & FAQs 2004.doc	Introductory Chapter	1149 KB	Andrew Aaronson	07/08/2004						
Troubleshooting Guide.doc	Troubleshooting Guide	819 KB	Andrew Aaronson	07/08/2004						
Update News June 2004.doc	Update News June 2004	472 KB	Andrew Aaronson	07/08/2004						

Instructions for accessing **Shared Files** via Web Folders (WebDAV).

File Navigation

Each folder, if it contains any documents or subfolders, has an expand icon next to it. Clicking it will display all the documents or folders within that folder and change the expand icon to a collapse icon. To close the folder, click the collapse icon. If you wish to expand or collapse all folders on the page, click either the Expand All or Collapse All tabs Collapse All Expand All.

You may access any document, graphic or file contained on the Shared Files tree, by clicking on its underlined name. To open the slideshow, click on the magnifier icon (see **Slideshow**, below). To work with document version control, if you have purchased this option, click on the version icon to the right of the posted date. The locked and unlocked icons allow you to perform file locking or unlocking functions, if you have been granted the proper permissions. You may reorder any file or folder on the Shared Files tree using the two reorder icons (see **File and Folder Reordering**, below). To edit the original File Upload page for any given document, click the edit icon opposite the document's name. If you wish to entirely delete the document, click the delete icon.

Locking and Unlocking Files

The locking/unlocking feature of Shared Files exists to prevent several users from making multiple file/folder changes simultaneously, some of which would override or supersede others, without regard to the permission status of the user or the importance of the edits.

Locked folders or files are designated on the Shared Files screen by the locked icon ; unlocked folders or files are designated by the unlocked icon , seen opposite the file or folder name.

The lock function of Shared Files operates under a series of universal rules from the WebDAV protocol (not designed by BlueStep), which all WebDAV-compliant systems must follow. These can be stated as a series of conditions, as described in BlueStep terminology.

Different locking interfaces are employed by every WebDAV compliant software application. All Microsoft Office 2000™ (and later) products lock a file when they open it and unlock it by closing. In WebDrive™, locking and unlocking is controlled through a tab on the Properties dialog box, after locking has been specifically enabled. Other clients/programs/processes support some form of locking and unlocking, but the interface and its functioning is controlled by the structure of the program and its specific configuration on your computer, not by BlueStep.

Locking Files
A fully locked (Primary or Secondary Lock) file or versioned file is restricted in regards to adding content, editing, deleting, renaming, moving location and changing permissions. A versioned file can be locked by anyone with at least Author permissions. Non-versioned files require Editor permissions of the locking individual. A fully locked file results in other types of locks being activated on other file(s) in the hierarchy. A Dependent-on-Child lock is created for the folders in a direct line above the subject file back to the root level of the hierarchy. However, files and folders that are not in a direct line back to the root, but may be contained within folders that are direct line, remain unlocked.

Locking Folders
Any locking of folders must be done by users with at least Author permissions. A fully locked folder results in other types of locks being activated on other folder(s) in the hierarchy. A Dependent-on-Child lock is created for the folders in a direct line above the subject folder back to the root level of the hierarchy. However, files and folders that are not in a direct line back to the root, but may be contained within folders that *are* direct line, remain unlocked.

Folders may be locked either recursively or non-recursively. For a Recursive Lock, a Secondary Lock is created for all sub-folders and sub-files below the subject resource, flowing *down* through all levels of the hierarchy. For a Non-Recursive Lock, a Dependent-on-Parent Lock is created for all files and folders on the level immediately below the subject resource, but not for any hierarchical levels below the immediate level.

Unlocking Files and Folders
If you are the lock owner for the lock on any given resource, you may unlock the resource whenever and from wherever (from Shared Files, Web Folders, WebDrive, etc.) desired. You will always be able to go to BlueStep™ Shared Files and unlock it from there, in case the other processes have operated or closed abnormally. Users with Editor permissions may override locks, no matter who owns the lock.

If at any time you receive an on-screen message stating that a particular function cannot be performed with a file/folder in a Web Folder or if a Web Folder function fails to operate, go directly to the website version of Shared Files where the file/folder is contained and check 1) the locked/unlocked status of the item and 2) the permissions associated with that specific item.

Following the on-screen instructions and information, as well as requesting that an administrator from your organization edit the permissions, will usually resolve any restrictions you have encountered.

Shared Files Manage Lock Screen

The Manage Lock screen is accessed from the lock/unlock icons in BlueStep's Shared Files page and the Manage Lock link on the Version Directory. The Manage Lock screen is divided into two basic areas, Locks Affecting This Folder and Available Actions.

The Locks Affecting This Folder section is informational in nature. You may see what locks, if any, apply to what file or folder functions and who owns the lock.

The Available Actions section lists varying checkboxes that you may use to work with the lock. If you are not the lock owner, there may be no actions available to you, in which case, you would need to contact the lock owner for assistance in making file or folder changes.

The Manage Lock screen can display many, many variations for each file/folder within the Shared Files system. This makes for an almost unlimited number of possible informational combinations on the screen. You will need to carefully read the screen for information concerning what is locked and what actions you can take.

By going to the Root Folder in Shared Files, you can see all the locks throughout the Shared Files system. There are dozens of possible locking configurations, depending upon the number of files/folders and the factors listed below.

- The type of resource being locked – folder, file or versioned file
- The person who currently owns the specific lock on this resource
- The process (BlueStep™ Shared Files web interface, Microsoft Office™, Web Folders, WebDrive, etc.) being used at the time of locking
- The permission level of the person working with the resource
- The type of lock that is applied to this resource

WebDAV and Web Folders

WebDAV support is integrated into many of the latest operating systems on current computer systems and networks. When files and folders are stored on a remote server, such as those in BlueStep's Shared Files modules, the WebDAV protocol allows users of Windows, Mac or UNIX computers to access these items with the same ease as accessing the desktop on the user's own computer. Microsoft's client WebDAV support is called Web Folders. BlueStep™ has also adopted this name for clarity and ease of identification.

Web Folders may only be used with operating systems and programs that have WebDAV support. These include Windows™ 98/2000/NT/ME/XP and Microsoft Office 2000™ (including later versions). Mac OS X™, Goliath™ for Mac OS 8.1, WebDrive™, Adobe GoLive™, Macromedia Dreamweaver™ and many others also support WebDAV.

Web Folder Functions

Web Folders provide several distinct advantages and valuable benefits, including:

- Drag-and-Drop functionality between user's computer and online shared files
- Multiple uploads and downloads of files and folders
- File and folder locking to prevent simultaneous updates by multiple users
- Easy availability and integration with the user's desktop
- Same online username/password for Web Folder access as for BlueStep access
- No need to use a browser for direct access of online files*

** There are some advanced file and folder functions within HQ™ that only BlueStep sites support. You will still need to use a browser to perform these functions.*

In HQ™, any file may be posted though an online browse-and-upload procedure. Using WebDAV, any file or folder may be added to Shared Files, accessed, moved, edited and deleted using a drag-and-drop method (or other standard keyboard cut-and-paste technique). You may use either method (browser-based or desktop) at any time to perform these functions - using one does not preclude using the other when it is more convenient to do so.

Creating Web Folders
Users of BlueStep™ products may have access to one or many Shared Files, depending upon the number of Teams, Connect™ sites or HQ™ systems available through their organizations. For each Shared File you would like to have available on your desktop, you will need to create a Web Folder. Once a folder is created for a specific Shared File page, you need never do so again. The Web Folders will be available on your desktop (or other area in your file system) and continue to reflect the current state of the online Shared Files unless you disconnect the folders.

At the bottom of each Shared Files page in BlueStep™, you will see a link Instructions for Accessing via Web Folders (WebDAV). Open this link and find the instructions that apply to the system you are using. Instructions are included for Windows 2000, XP, 98, NT, Mac OS X, Mac OS 8.1 or Dreamweaver.

Any operating system may be configured in a variety of ways on any given computer. We have made every effort to offer instructions that are specific, yet point you in the correct direction should your OS vary from the usual set up. The important item in the instructions is the link (beginning with “http…). Please be sure to copy-and-paste or type it into the appropriate field *exactly* as shown, excluding quotation marks.

Using Web Folders
Once you have created a desktop Web Folder (instructions include adding a folder shortcut to your desktop in most cases, but you may place it anywhere desired in your file system), you may open it and use any of several methods to add, delete or move files, including drag-and-drop, Ctrl C/Ctrl V, etc. Any actions that you take in the desktop folders will also occur within the Team™, Connect™ or HQ™ Shared Files pages.

As noted above, there are some advanced file and folder functions within Team™, Connect™ and HQ™ that only BlueStep sites support. You will still need to access the Shared Files pages online in order to perform these functions. They include: setting file and folder permissions and overriding a file lock. Most WebDAV clients (Windows, GoLive, etc.) will also not allow you to create a slideshow or use advanced locking capabilities. You will need to explore the capabilities of your specific WebDAV client and its configuration to determine which features are available to you, as they are not exclusive to BlueStep and not controlled by our Web Folders interface.

Securing Web Folders
As with all BlueStep™ products, security is one of the prime concerns. All permissions and locks available on the standard Shared Files pages are in force in the Web Folders. For instance, online Shared Files that you do not have permission to edit will still be unavailable for editing when contained in the Web Folder. Any folders that are locked in Shared Files will still be locked in the Web Folder. Conversely, any permissions you have been granted to the files/folders in Shared Files will also be fully granted in Web Folders.

If at any time you receive an on-screen message stating that you may not perform a particular function with a file/folder in a Web Folder or if a Web Folder function fails to operate, go *directly to the website version of Shared Files where the file/folder is contained and check 1) the locked/unlocked status of the item and 2) the permissions associated with that specific item.*

Following the on-screen instructions and information, as well as requesting that an administrator from your organization edit the permissions, will usually resolve any restrictions you have encountered.

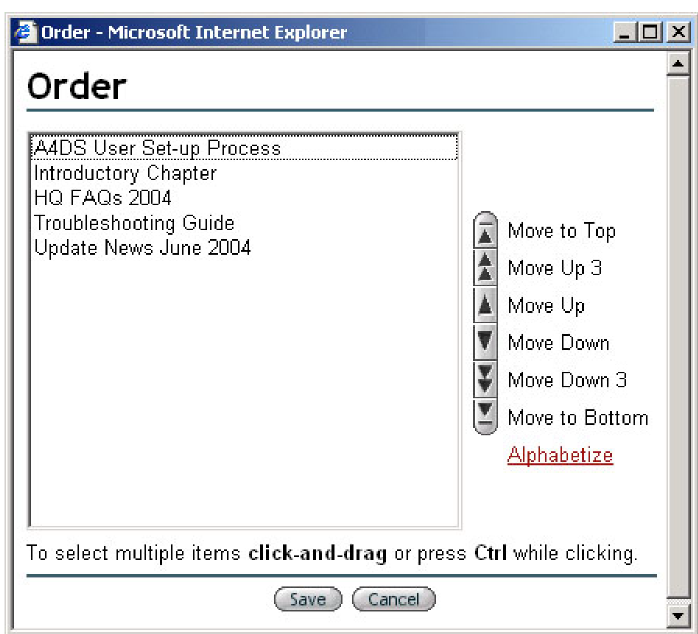
File Moving
You may wish to move a file from one folder to another. This is accomplished either through Web Folders, as described above in **WevDAV and Web Folders**, or the Shared Files screen through online functions.

On the Shared Files screen, start by clicking the edit icon associated with the file. In the resulting pop-up window, click the drop-down for File Location. All folders in the Shared Files system will appear and you can select the new location for the file. Click the Save button when you are satisfied with the selection.

In some cases, you may receive the error message Duplicate name: ___________. Please choose another name or location for this file. This is caused by attempting to move a file into a folder containing an existing file of the same name. To correct this, either change the name of the folder or move it to another folder where there will be no naming conflict.

File and Folder Reordering
You may change the order in which files and folders appear on the Shared Files tree. Any document that you post will become the last file in its selected folder. Any folder you create will become the last folder in the root folder or the last sub-folder within an existing folder. You can move folders into any order and move their contents into any order by using the two reorder icons .

The reorder files icon will appear to the right of all folders on your Shared Files tree. Click it for a pop-up window displaying any documents/graphics that are in that folder, along with the movement function keys. If there are no files inside this folder, the pop-up will be blank. In that case, either there is nothing in the folder at all or the folder only contains other folders.



The **reorder folder** icon will appear to the right of all folders on your Shared Files tree. Click it for a pop-up that contains the list of all folders, along with the movement function keys. If there are no folders inside this folder, the pop-up will be empty. In this case, either there is nothing in the folder at all or the folder only contains files.

The reorder folder function is particularly useful in the case of the icon associated with the root folder. Using it will reorder the main folders in your system to a format that is meaningful to you and your organization.

Editing Files
The edit icon may be used to edit any file, assuming you have the correct permissions to perform that function for the specific file. The edit icon opens a pop-up window very similar to the New File screen, on which you can rename the file, change its location (to the root folder or any other existing folder) or provide a different file description. See the example below and also see **Adding Files**, below, for comparison.

*Editing files from the edit icon **does not** allow you to change the content of the file.* To edit content, open the file and save it to a local drive on your computer. Open it from the local drive and make any editing changes desired.

In some cases, you may receive the error message Duplicate name: ___________. Please choose another name or location for this file. This is caused by one of two (2) operations:

- Attempting to **rename** a file of the same name as an existing file in the current folder
- Attempting to **move** a file into a folder containing an existing file of the same name

To correct this, either change the name of the file or move it to another folder where there will be no naming conflict.

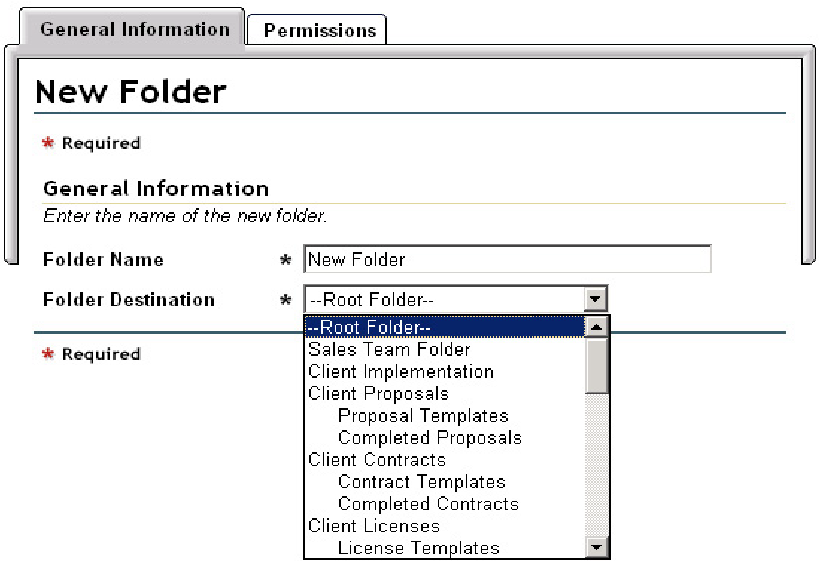
New Files and Folders

New files and folders may be added to HQ™ Shared Files through either the Web Folders application, as discussed above, or the Shared Files screen through online functions.

The Shared Files page always contains a root folder, created when HQ™ was configured for your organization. Any other files and folders that appear on the page have been added to the root by administrators or by users in the organization who have the proper permissions. Whether you are an administrator who is initially creating the folders/files for the Shared Files page or a user adding new files to an existing Shared Files tree, the same process is used to build and populate Shared Files.

Adding Folders
To effectively store files, it is most likely you will want to sort them into folders. Organization Administrators or those who are familiar with your organization and its data storage needs are usually the best qualified to decided which folders are needed and in what order they should appear.

To add a folder, click the New Folder button New Folder on the upper right. On the New Folder screen, enter a title for the folder as desired. The Folder Destination drop-down allows you to select any of the folders that exist in your Shared Files tree as a destination for the new folder. If there have been no other folders created, only the Root Folder will show in the drop-down. If you want the new folder to be one of the major folders in the system, select Root Folder as its destination. If you want it to be a sub-folder of an existing folder, click on the appropriate folder name.



When done, click Save. The new folder will appear on the Shared Files tree at the bottom of the root folder or the bottom of the selected destination folder. You may reorder the folders now or at any time in the future using the reorder icons (see **File and Folder Reordering**, above). You may also at any time rename the folder or move its destination to the root or another folder by clicking the edit icon that appears opposite the folder name. To delete the folder entirely **and all its contents**, click the delete icon associated with it.

In some cases, you may receive the error message Duplicate name: ___________. Please choose another name or location for this folder. This is caused by one of four (4) operations:

- Attempting to **create** a folder using the same name as an existing folder in the current folder
- Attempting to **create** a folder using the same name as an existing file
- Attempting to **rename** a folder the same name as an existing folder in the current folder
- Attempting to **move** a folder into the current folder, which contains an existing folder of the same name

To correct this, either change the name of the folder or move it to another folder where there will be no naming conflict.

Adding Files

Once any necessary folders have been created, you may upload files to store in them. Any files you wish to add to Shared Files must exist somewhere on your computer, on a CD in your CD drive, on a floppy disk inserted in your floppy drive or accessible through network connections.

Click the Add File button Add File at the upper right of the Shared Files screen. On the New File screen, seen below, click the Browse button. This will open a pop-up window displaying files, folders, drives and networks on your computer, allowing you to navigate to the file you wish to upload. If the file does not exceed 20 megabytes, click on the file name, which will place it in the File to Upload field. If you choose to have the file known by a different name in Shared Files from the original name in the source, type the new name into the Rename To field.

The File Location drop-down displays a list of all folders in your Shared files tree. You may select any folder to contain the document or select Root Folder if the document is to be outside the created folders. In either event, the file will upload as the last item in the selected folder or the Root Folder. Enter a description in the File Description field, if desired.

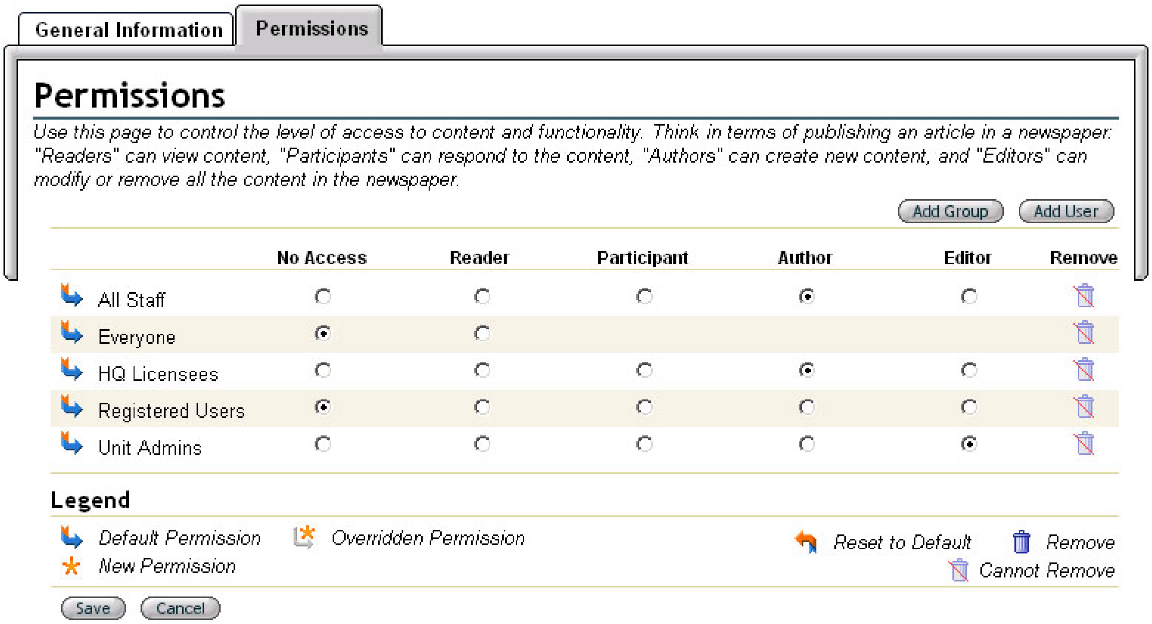
If you have purchased the Version Control option, you may select to enable versioning at this point or return to this screen later to enable versioning (see **Document Versioning**, for details).

In some cases, you may receive the error message Duplicate name: ___________. Please choose another name or location for this file. This is caused by one of three (3) operations:

- Attempting to **upload** a file that already exists under this name in the current folder
- Attempting to **rename** a file the same name as an existing file in the current folder
- Attempting to **move** a file into a folder containing an existing file of the e name

To correct this, either change the name of the file or move it to another file where there will be no naming conflict. Also note that folders may not be named the same as an existing file name.

File Permissions
By default, file security is inherited from the permissions set on the Shared Files screen or from higher in the organization structure. If you desire to set security for this specific file separate from other files, click the Permissions tab. On the resulting screen you may choose from any of five (5) permissions settings using the radio buttons.



Additionally, using the Add Group and/or Add User buttons allow you to provide specific access to this document for people and groups other than those listed, such as All Staff, Everyone, HQ Licensees, etc., as seen above. Remember to click the Save button when done. Also see **Permissions** in **Administrative Options**.

Click the Upload button Upload at the bottom of the screen. The maximum upload size for any file is 20 MB. Please be patient. Large files could take several minutes to complete, particularly if being pulled from a floppy disk or through a network connection.

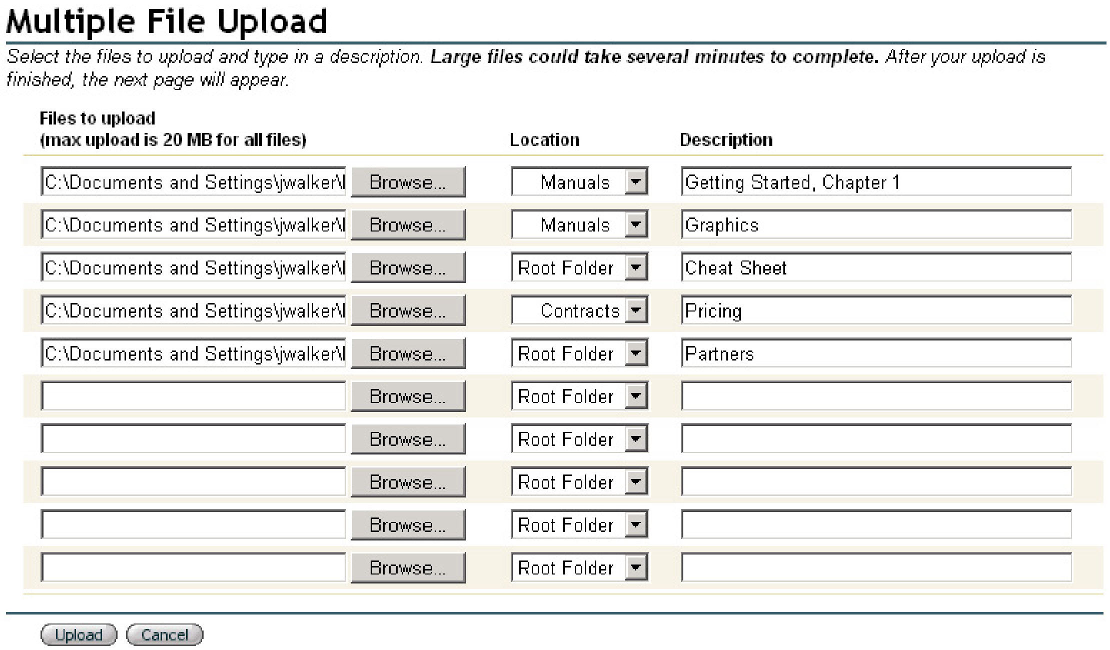
Please click the Upload button only once. Clicking it more than once may result in locking your computer or crashing your system, depending upon the size of the file and the programs concurrently running.

When loaded, you may reorder the files using the reorder icons (see **File and Folder Reordering**, above). You may also at any time rename the file or move its destination to the root or another folder by clicking the edit icon that appears opposite the document name. To delete the file entirely, click the delete icon associated with it.

Multiple File Upload

If you have several files to upload at once, the Add Multiple Files button Add Multiple Files or the multiple files link Add Multiple Files will speed the process. The button is available on the upper right of the Shared Files screen. The button and link are both seen on the File Upload screen.

This screen functions similarly to the individual File Upload screen (see **Adding Files**, above), allowing you to browse your computer for the needed file, select a location and add a description. However, there is no function to enable version control for any of these files at this time. After the files have been uploaded, you may reenter the files individually from the Shared Files screen. Using the edit icon, enter the Edit File screen, then click ☐ **Enable Version Control**. See **Document Versioning**, above.



As you are selecting the files you need (up to ten (10) at a time) verify that the megabyte total does not exceed 20 MB. If it does not, click the Upload button Upload at the bottom of the screen. Please be patient. Large files could take several minutes to complete, particularly if being pulled from a floppy disk or through a network connection.

Please click the Upload button only once. Clicking it more than that may result in locking your computer or crashing your system, depending upon the size of the file and the programs concurrently running.

When loaded, you may reorder any individually files using the reorder icons (see **File and Folder Reordering**, above). You may also at any time rename the files or move the destination to the root or another folder by clicking the edit icon that appears opposite each file name. As above, you may also enable version control from the Edit File screen. To delete a file entirely, click the delete icon associated with it.

Security Manager

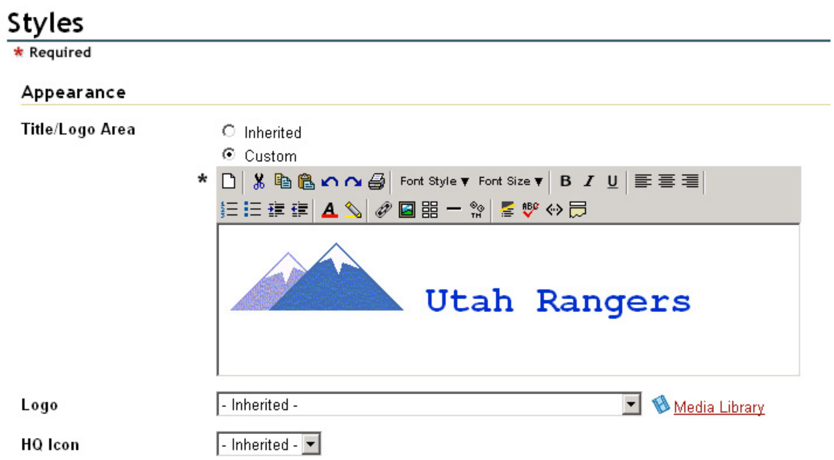
The Security Manager area contains functions that are not visible to every user, but play a crucial role in customizing and securing your HQ™ application.

Styles

The Styles page controls items that appear in the space between the dashboard and the main navigation bar and to the right of the HQ Management logo and title.

The HQ logo and HQ Home titles on the left are unaffected by styles, but you may add graphics and text to the dark blue area to the right using the editor box.

The dark blue title/logo space is 47 pixels high. While you may add logos and text that are higher than that, doing so will create unattractive edge distortions in the beige block containing the HQ Home title.

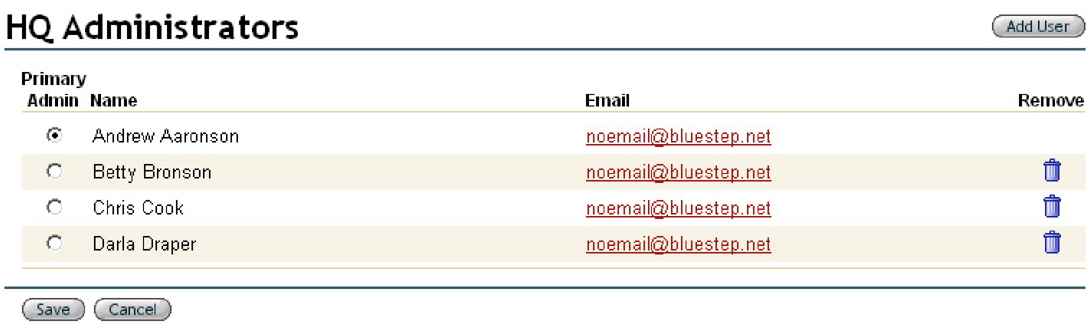


Using the editor box allows flexibility in placement of a logo, however you may also insert a logo using the Logo field, which anchors the logo to the right end of the title/logo space. Any graphic images that are entered in the Media Library will be available on the Logo field drop-down. By clicking the media library link Media Library you can open the library directly and upload any new images that you need. See **Media Library**, below.

The HQ Icon field applies to the HQ Home page, which displays the nine virtual managers. In cases where the default icon for each virtual manager has been individually set to Inherited and you would like them all to be an identical icon, this field provides icon selection from a drop-down.

HQ Administrators

The original person shown as the administrator for your HQ™ was designated at the time HQ™ was created for your organization. Additional people can be added and/or the original administrator removed using the HQ Administrators page.



To add a person to the list of administrators, click the Add User button Add User . A list of all users will appear in a pop-up window. Scroll to the individual you wish to add and click on the select link Select. The HQ Administrators screen will reappear with the selected individual added to the list. You may do this as often as needed, just be sure to click the Save button when done.

If you want to change the Primary Admin, click on the radio button opposite the name of the new person you wish to designate as the primary. To remove an individual, click on the delete icon associated with their name. The Primary Admin does not have a delete icon. If you need to delete the current Primary Admin, select another Primary Admin, click the radio button and then click save Save. The HQ Administration screen will appear. Click the Manage button Manage, which will re-list the administrators, this time with a delete icon available for the original Primary Admin. Click it and click Save once more.

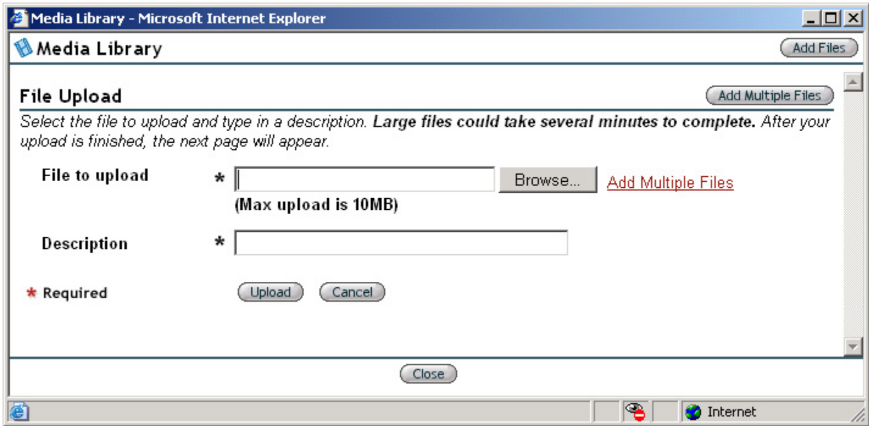
At virtually every level of Connect™, Relate™, Team™ and HQ™, the administrator has the option of restricting or allowing use of data or any functions/features at multiple points. Please heed the warnings concerning edit and deletion powers granted to administrators, and the serious consequences they can have to your HQ™ and its data when in the hands of unknowledgeable individuals.

Media Library

The Media Library is designed specifically for graphical images, audio and video files. Nearly any graphic, audio and video file will be supported in the Media Library, depending upon the current support inherent in the version of Internet Explorer™ (or other browser) that you or your organization are using. Presently gif, jpeg, png, pdf, Flash, avi, mpeg, midi, wave, mp3, zip, exe (for downloads) and others are storable and supported on the pages.

To add one of these types of files to the Media Library, click on the Media Library title under Security manager or on the link Media Library wherever it is displayed throughout HQ™.

The current contents of the library will display in a pop-up window. Click the Add Files button on the upper right for a File Upload screen. If more than one file needs to be added, click the Add Multiple Files button or Add Multiple Files link.



Click the Browse button. This will open a pop-up window displaying files, folders, drives and networks on your computer, allowing you to navigate to the file you wish to upload.

The Media Library has a 20 megabyte upload limit. If the file does not exceed that limit (or if the total of all files to be added with the Add Multiple Files function does not exceed 20 MB), click on the file name, which will place that name in the File to Upload field. The Description field will be automatically filled, but you may change the description entry, if desired. Click the Upload button and be patient. Uploading may take several minutes. When done, the Media Library screen will reappear.

Please click the Upload button only once. Clicking it more than once may result in locking your computer or crashing your system, depending upon the size of the file.

To view a slideshow presentation of all the Media Library files, click one of the slideshow magnifier icons . To edit the title or description of the file, click the edit icon . To delete the file, click on the delete icon .

Once content is uploaded to the Media Library, it is available for use any place that you see a media library link Media Library or from the insert picture icon contained in the header of the editor box.

Administrative Options

There are several options and 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 Edit Page that will appear to you at the upper right of various screens throughout the system. When you click the Edit Page button on a specific screen, a pop-up window appears containing General Information, Styles and Permissions tabs. Any work that you do on these screens will apply to the page on which you accessed the Edit Page button and to no others.

Edit Page - General Information
Using this screen, you may re-title the page and add an italicized hint to the Manager link on the HQ™ home page. You may decide to hide this page from navigation by clicking the 'Do not show'

box. From the Location field, you can open a drop-down, which allows you to move the page location within the list of managers, which changes the order as seen on the home page.

The Introduction section contains a BlueStep™ Editor box. Using the Editor gives you the ability to add text, links, graphics, fonts and tables, etc. to the page in much the same way that Microsoft Word™ or Corel WordPerfect™ programs are used to format documents.

Edit Page - Styles

The Styles screen controls items that appear in the space between the dashboard and the main navigation bar to the right of the HQ Management logo and title.

Since all BlueStep™ products operate in a hierarchical fashion, the styles selections placed here will not be seen other places in the system. Any work that you do on these screens will apply to the page on which you accessed the Edit Page button and to no others. Other than that distinction, the Edit Page – Styles operates in precisely the same way as Styles under the Security Manager.

Edit Page - Permissions

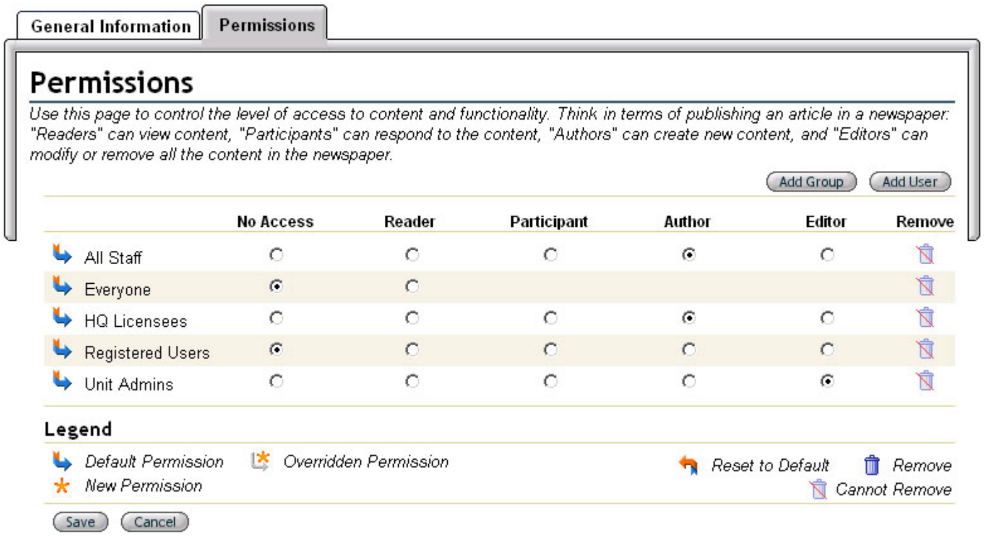
The HQ Administrator has the option of restricting or allowing use of data or any functions/ features at multiple points. Anything from a single field to the entire system may be included or excluded for entire groups or individual users through the various Permissions screens.

By selecting the Permissions tab on a specific page, your Permissions settings affect that page only. Any choices that you make on these screens will apply to the page on which you accessed the Edit Page button and to no others. You may set permissions on the main screens of My Office, Total Operations Management, Quality Control Manager, Service Manager and Office Manager and many subsequent screens throughout the system.

The Permissions levels are defined as:

- **No Access** – no admission of any sort to the item
- **Reader** – permission to view contents only
- **Participant** – permission to respond to content
- **Author** – permission to create and add content
- **Editor** – full permission to add, edit and delete content in any way

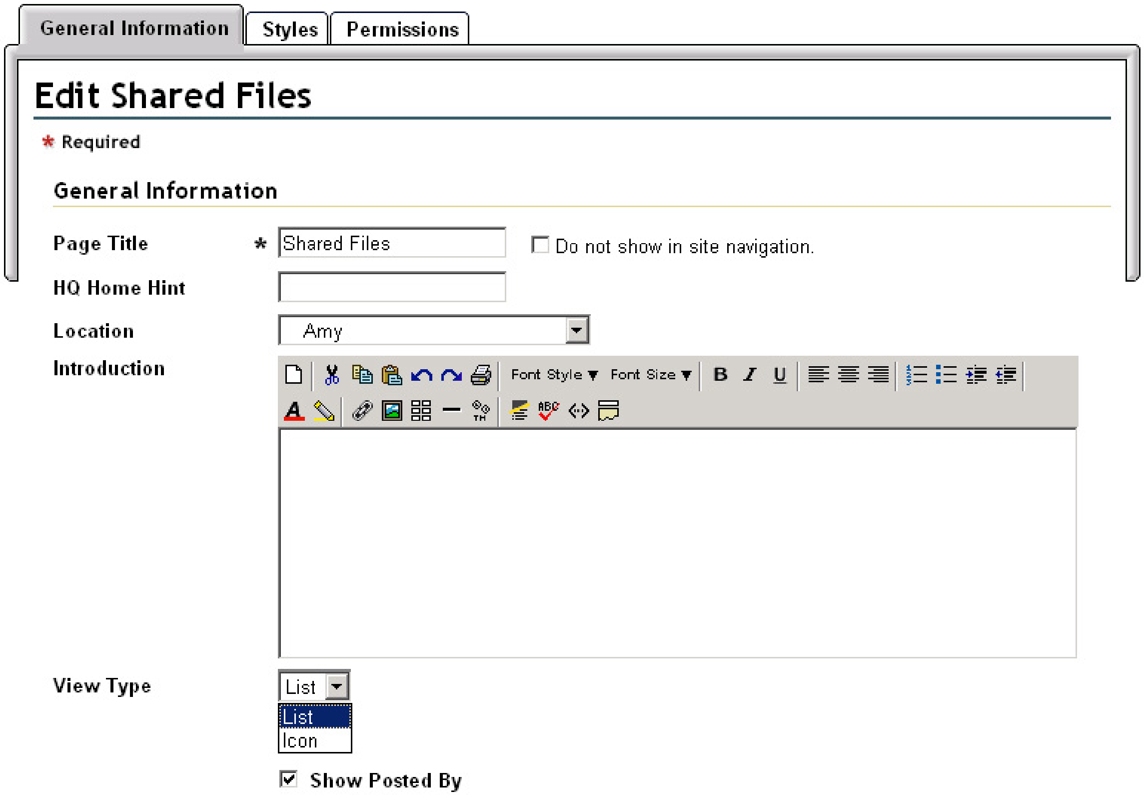
To activate any of these levels for a selected individual or group, click the radio button in the appropriate column. Individual users may be added by clicking the Add Users button Add User. A list of all users presently in the system will appear, allowing you to search, then click Select to add the needed individual. To add a group of users, click the Add Group button Add Group. A list of the security groups that have been configured for your HQ™ will appear. Click on the required group to add them to the permissions page. Once the users and groups have been added, you may adjust their permissions in any way desired.



Since permissions in all BlueStep™ products function hierarchically, the permissions granted at the top level of the organization will flow down the organization until they are overridden by selections made on a Permissions screen.

Edit Page – Shared Files
The HQ Administrator has the option of configuring the Shared Files page to display in a graphic (Icon) format rather than the default (List) format. However, all of the functionality remains the e, the page is simply displayed in a different layout. The illustrations seen in the **Shared Files** section under Office Manager are from the standard Shared Files (List) format.

Turning on the Icon Format
If you have been designated an HQ Administrator, the Edit Page button will be visible to you on the upper right of the Shared Files screen. When clicked, the General Information screen will appear just as it does in the above discussion (see **Edit Page – General Information**), with the addition of two (2) options available only on Shared Files.

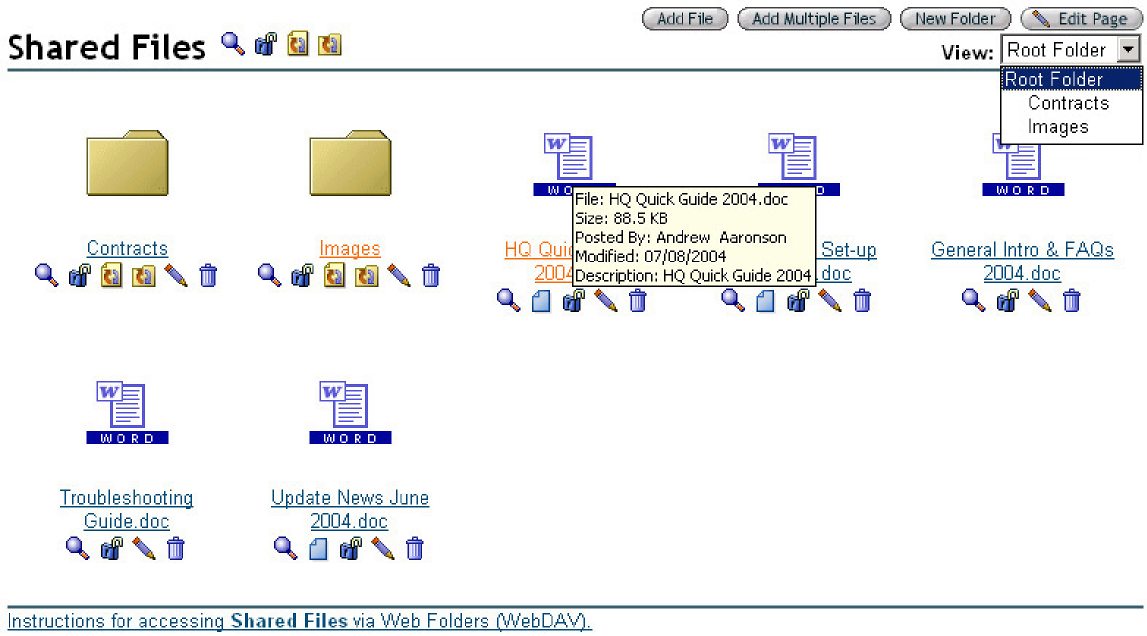


Posted By
You may choose to have the names of the persons who have posted documents displayed or hidden by using the checkbox. An unchecked Show Posted By box eliminates the Posted By column on the List view and the Posted By line in the Icon view.

View Type
You also have the option of selecting the List view or the Icon view from the View Type drop-down, which alters the layout of the main Shared Files page.

The Icon view defaults to display each folder in the root folder as a graphic, with the function icons (slideshow, lock, reorder, edit and delete) seen below. Any files that exist in the root folder have the slideshow, version, lock, edit and delete function icons shown below. To view the contents of a different folder, click the View drop-down. In the example below, Contracts and Images are also available to view.

If you mouse over any document within any folder, the information shown on the Shared Files List view (file name, file size, name of the posting individual, last date the file was modified and file description) becomes available, as shown in the small yellow box below.



The Icon view is particularly valuable if you have many images stored in a Shared Files folder. Nearly any graphic, audio or video file will be supported in Shared Files, depending upon the current support inherent in the version of Internet Explorer™ (or other browser) that you or your organization are using. Presently gif, jpeg, png, pdf, Flash, avi, mpeg, midi, wave, mp3, zip, exe (for downloads) and others are storable and supported on the pages. These will appear as thumbnail images, rather than icons, when the folder in which they are contained is opened, and include the function icons, slideshow, lock, edit and delete.