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Paua Data Entry Methods

Bryan Spondre April 24, 2017

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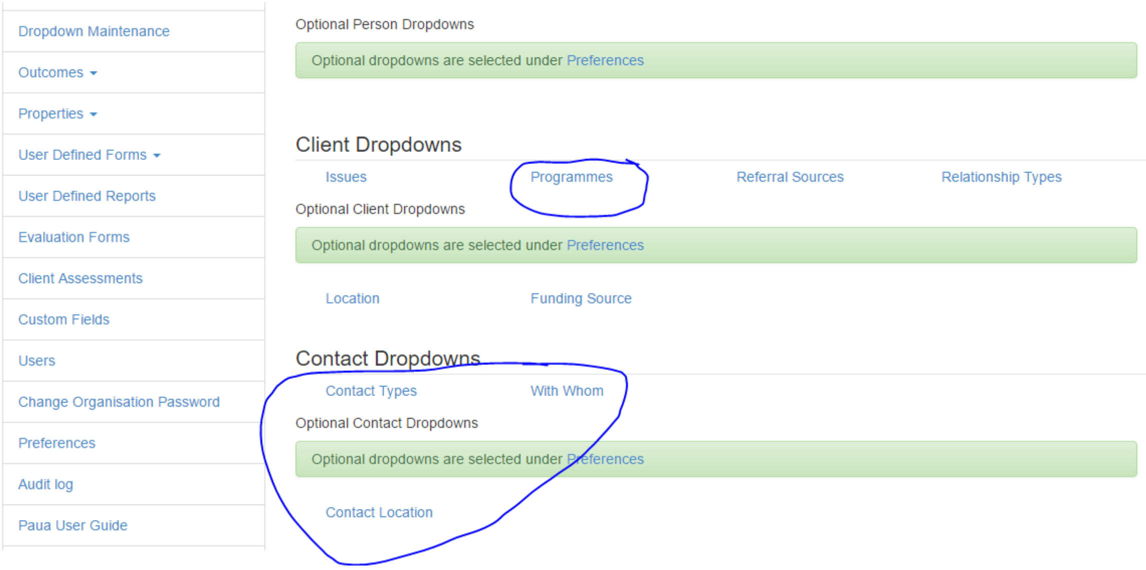
Programmes and Client Contact Details Dropdowns



Before Client Data entry can begin the “Programmes”, “Contact Type”, “With Whom” and “Contact Location” drop downs must be populated. This is only done once and the standard MSSAT|ANZ categories are attached. These are needed for consistent reporting to the MSSAT|ANZ board, regions can add their own categories in addition to these.

From the **Home** menu”

1. Select **Administration**
2. Select **Dropdown Maintenance**
3. Select each of “Programmes”, “Contact Type”, “With Whom”, “Contact Location” and enter the categories.

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Set Up User Roles

Each User has a defined set of permissions allowing different levels of access and breadth of alterations to the client database. The extent of permissions need to be limited as much as possible to ensure security and privacy.

The first step is to create a list of user designations: Manager, Office Administration, Operations, Peer Support Worker.

From the **Home** menu

1. Select **Administration**
2. Select **Dropdown Maintenance**
3. Select **User Designation**
4. Select **New User Designation** or select to edit.

Then assign user designations and permissions to individuals

From the **Home** menu

1. Select **Users**
2. Select **New User**
3. Or edit an existing user.

User permissions need to be carefully considered. Refer to http://user-guide.pauasoftware.co.nz/admin/users or contact Paua Software for any clarification. Peer support workers do not need Supervisor or Admin privileges and don't need specific privileges to add session details.

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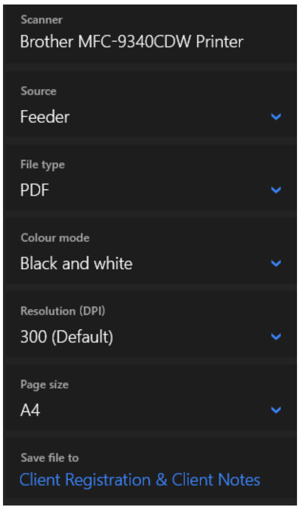
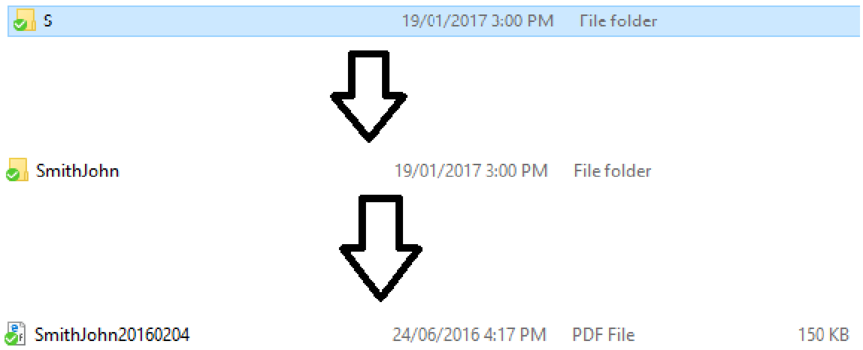
Client Data Entry

Entering Client Registration Forms

1. Locate each part of the Client Registration booklet (Consent Form, Registration and Assessment & Plan)
2. Remove the staples from the documents, and check that all the documents are flat (no dog ears etc)
3. Scan the documents using the Scan application, with the settings being; Source: feeder, File type: PDF, Colour mode: Black and white, Resolution (DPI): 300 (Default), Page size: A4, Save file to the client registration folder
4. Create a folder inside the corresponding folder with the clients' name, in the format LastnameFirstname. For example, John Smith would be SmithJohn
5. Move the PDF file inside the clients' newly created folder. Rename the PDF file in this format; LastnameFirstnameYearMonthDay. For example, John Smith, who registered on the 4th of February 2016 would be SmithJohn20160204

Images





Creating a new client

1. Go to pauasoftware.co.nz
2. Sign in first using the Better Blokes organisational login, then with your personal user login
3. Navigate to Client Management, which is found on the sidebar
4. Click on New Client, also on the sidebar, and then Create Client with New Person (not on the sidebar)
5. Use the details from the Clients' registration form to fill all applicable forms
6. Click on the blue create button at the bottom of the webpage
7. To add the clients' contact details, ensure you are on the Client Details tab on the clients' page (you will land here by default after creating a new client)
8. Click on the *edit / view details* text
9. Go to the *Contact Details* tab
10. Add the contact details for the client

C:\Users\BryanSpondre\AppData\Local\Temp\OneNote\16.0\Exported\{38B53EB6-90BB-4AE3-B313-5A148B1AA235}\NT\3\PauaDataEntryMethod20171017.docx

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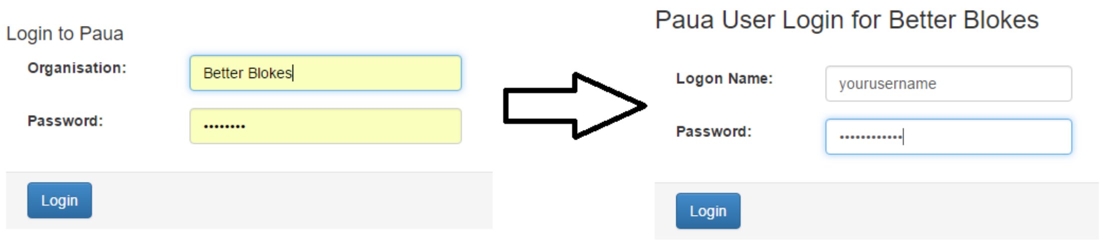
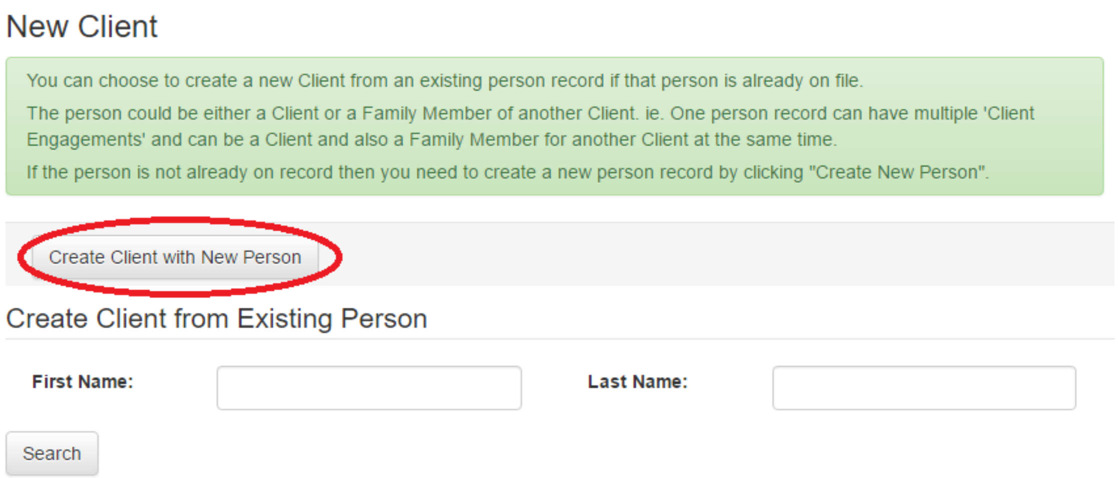
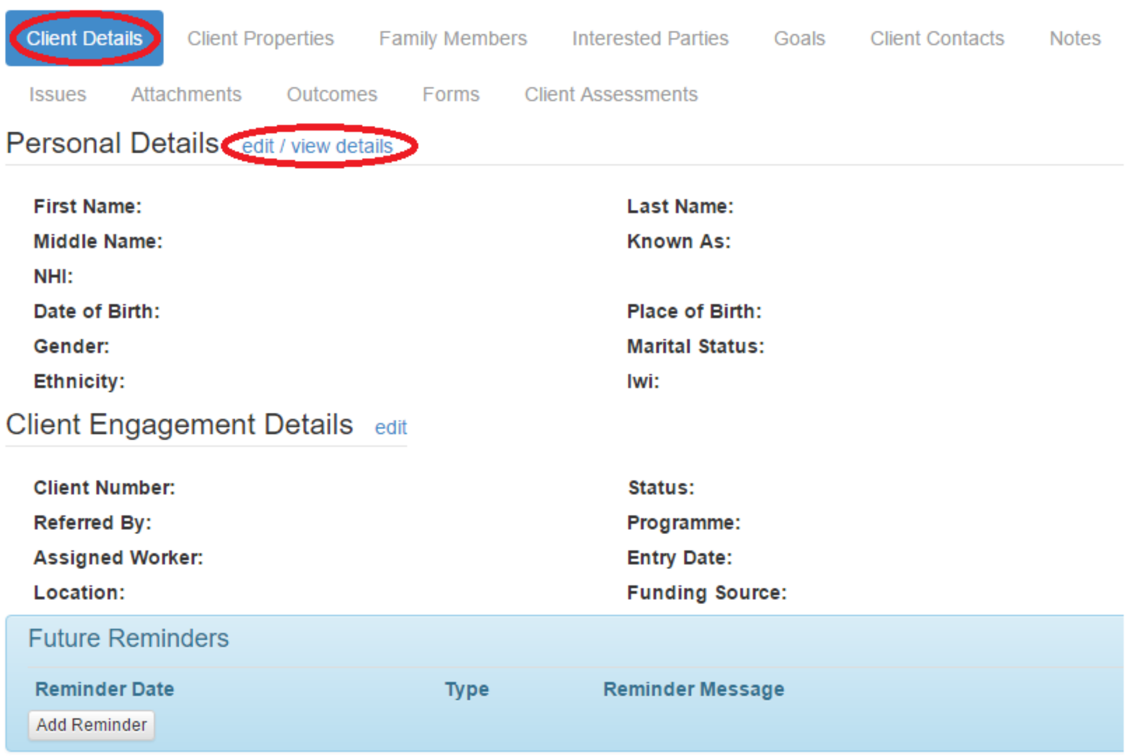
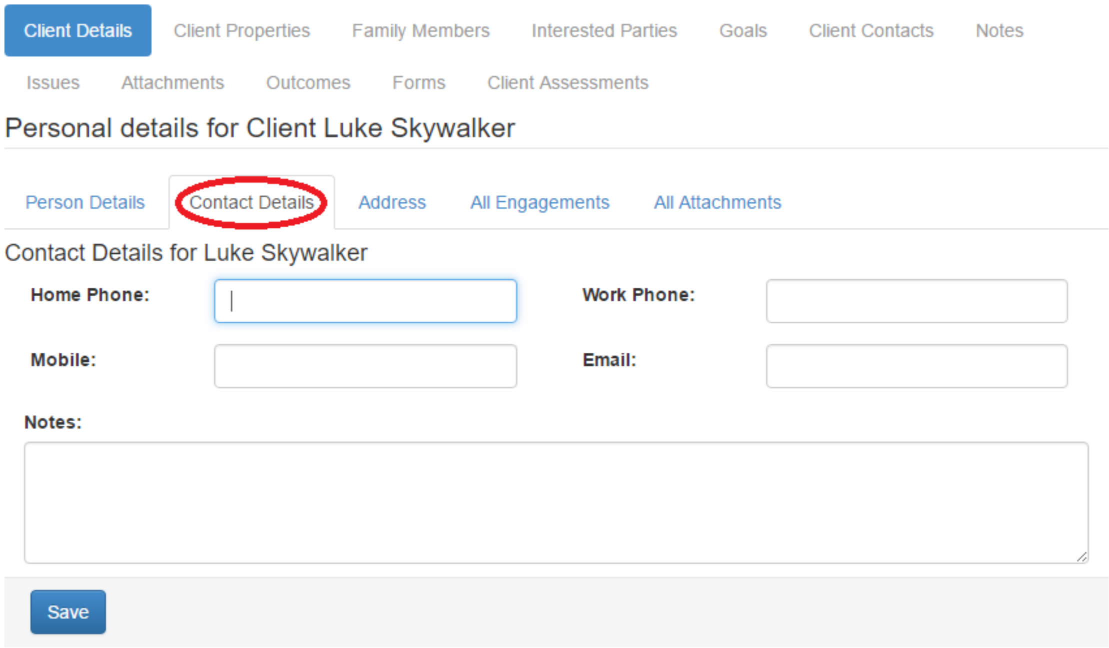
11. Navigate to the attachments tab
12. Click on the *New Attachment* button, then upload the Client Registration form PDF you created earlier. Fill the description with Client Registration

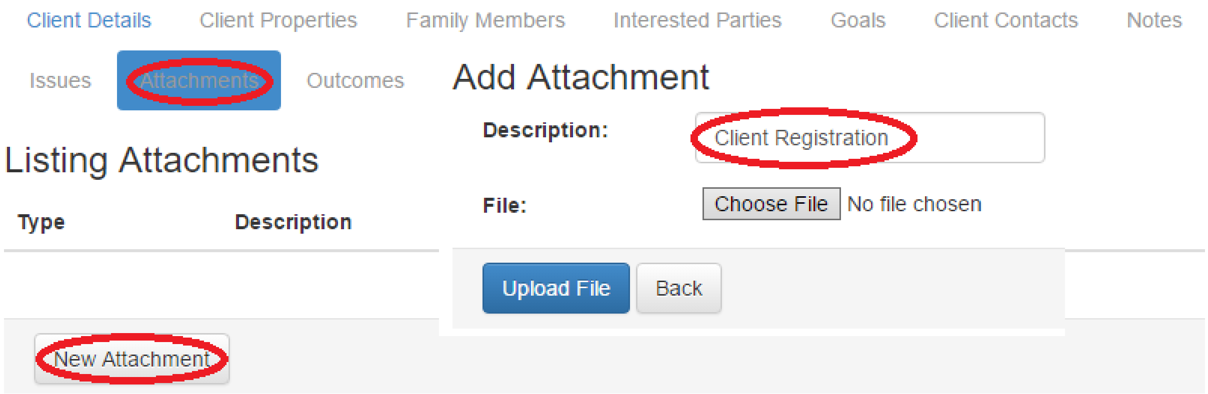
Images











Adding a face-to-face session

1. Go to pauasoftware.co.nz
2. Sign in first using the Better Blokes organisational login, then with your personal user login
3. Navigate to Client Management, which is found on the sidebar
4. Enter the clients' first and last name into the corresponding fields on the page
5. Click on the clients' name on the resulting webpage
6. Go to the Client Contacts tab, and click on the *New Client Contact* button.
7. Click on the Contact Type dropdown and select *Face to Face -Individual*
8. Click on the Contact Date box and enter the date, in DD/MM/YYYY format
9. Click on the Worker dropdown, and select the worker who held the face-to-face session with the client
10. Click on the With Whom dropdown, **if** another person was present at the face-to-face, such as a councillor or probation officer. If the appropriate option is not available, contact your admin
11. Tick the *Face to Face with client* checkbox.
12. Enter the time spent with the client in hours and minutes in their appropriate dropdowns

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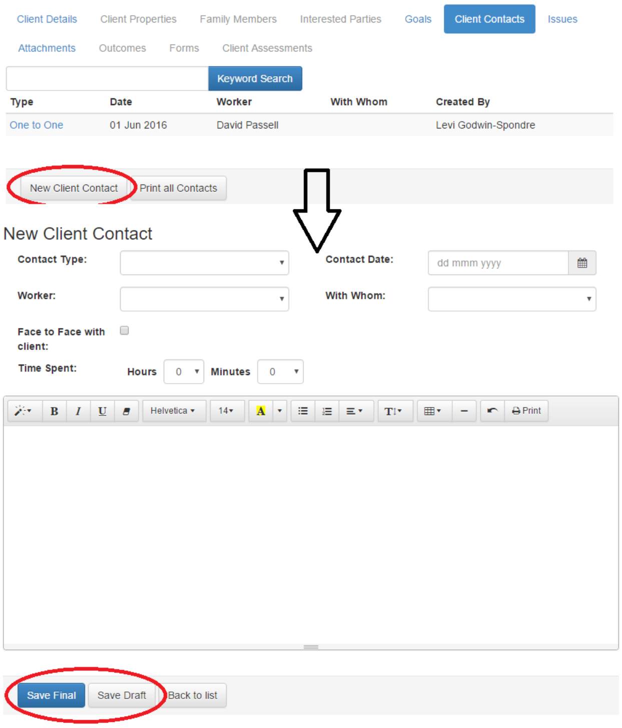
13. Enter any notes about the face-to-face meeting in the textbox
14. Save the client contact as final or as a draft by clicking the corresponding button at the bottom

Images



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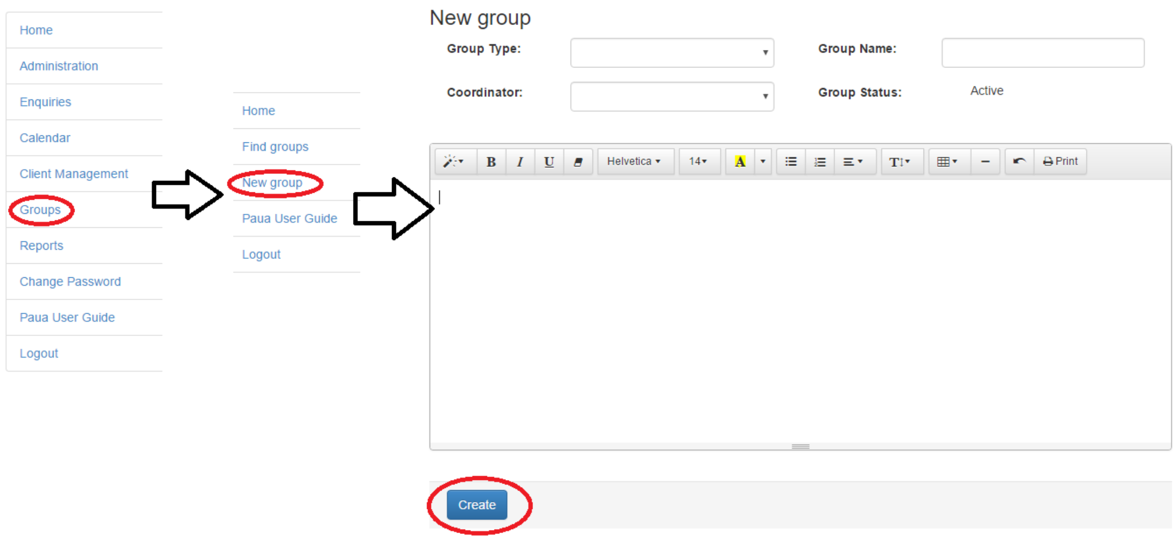
Data entry for Groups

Creating a group

1. Go to pauasoftware.co.nz
2. Sign in first using the Better Blokes organisational login, then with your personal user login
3. Navigate to Groups, which is found on the sidebar
4. Select the group type, name, status and the coordinator
5. Put any notes in the large text box
6. Press the create button

Images



Adding clients to a group

1. Go to pauasoftware.co.nz
2. Sign in first using the Better Blokes organisational login, then with your personal user login
3. Navigate to Groups, which is found on the sidebar
4. Press on the Find groups option on the sidebar
5. Search for the group you want to add clients to
6. Press on the “Group members” tab at the top of the window
7. Press the “New Member” button at the bottom of the window
8. Search for the client using their first or last name
9. Click on their name to add them to the group

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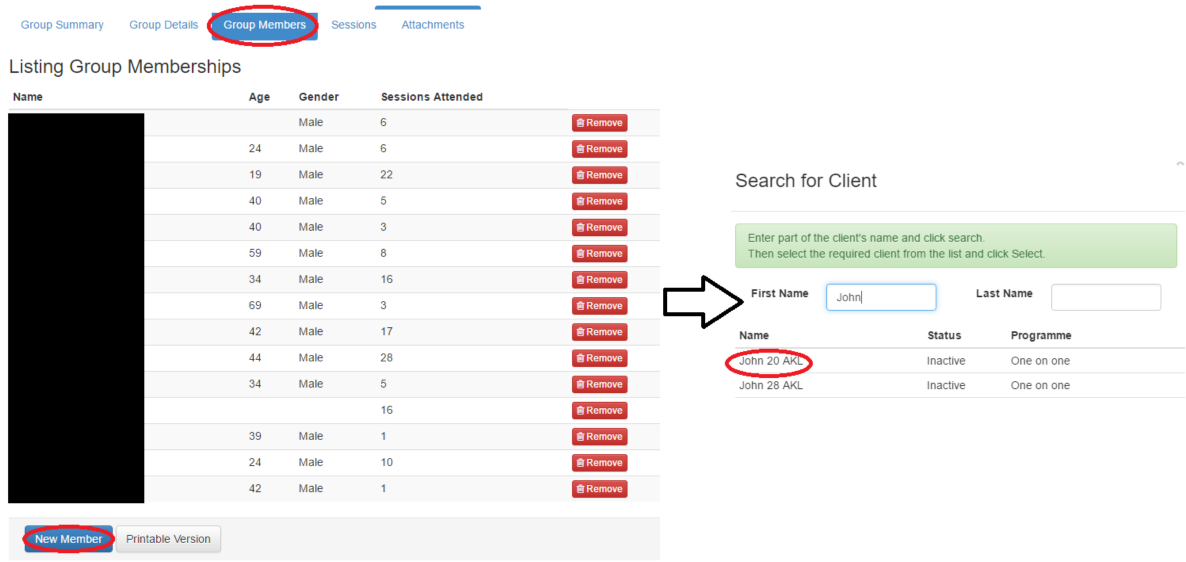
Images

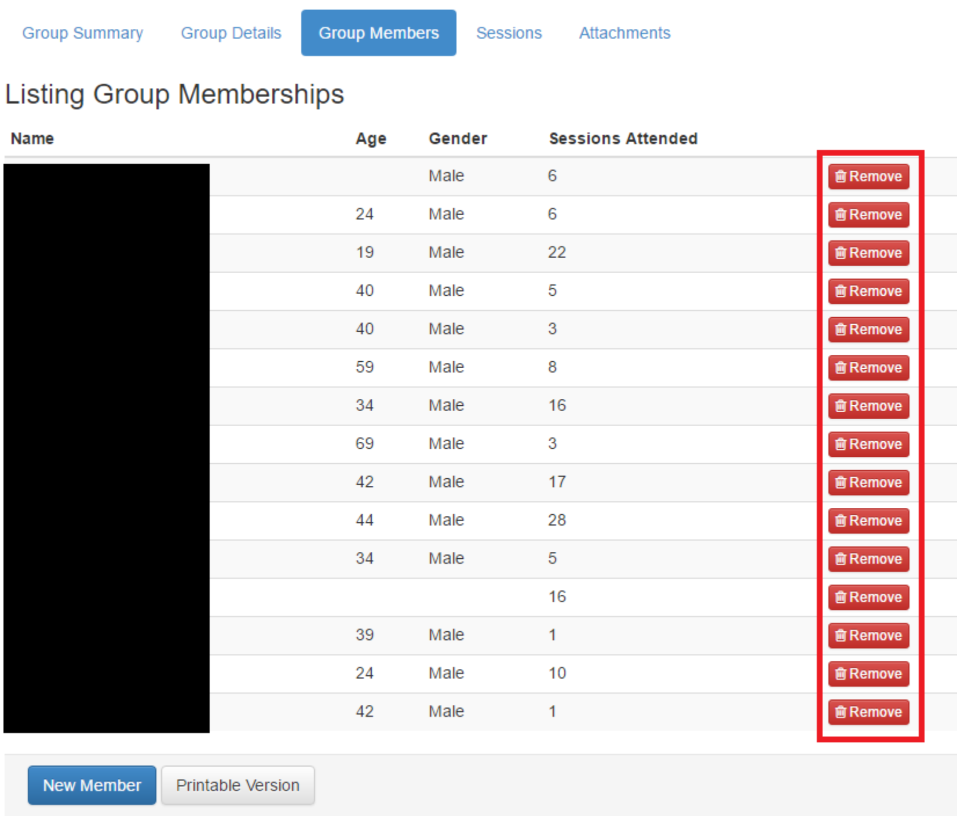


Name	Age	Gender	Sessions Attended	
[redacted]		Male	6	Remove
	24	Male	6	Remove
	19	Male	22	Remove
	40	Male	5	Remove
	40	Male	3	Remove
	59	Male	8	Remove
	34	Male	16	Remove
	69	Male	3	Remove
	42	Male	17	Remove
	44	Male	28	Remove
	34	Male	5	Remove
			16	Remove
	39	Male	1	Remove
	24	Male	10	Remove
	42	Male	1	Remove

Removing clients from a group

1. Go to pauasoftware.co.nz
2. Sign in first using the Better Blokes organisational login, then with your personal user login
3. Navigate to Groups, which is found on the sidebar
4. Press on the Find groups option on the sidebar
5. Search for the group you want to remove clients from
6. Press on the "Group members" tab at the top of the window
7. Click on the red "remove" button on the side, next to the client you want to remove

Images



Name	Age	Gender	Sessions Attended	
[redacted]		Male	6	Remove
	24	Male	6	Remove
	19	Male	22	Remove
	40	Male	5	Remove
	40	Male	3	Remove
	59	Male	8	Remove
	34	Male	16	Remove
	69	Male	3	Remove
	42	Male	17	Remove
	44	Male	28	Remove
	34	Male	5	Remove
			16	Remove
	39	Male	1	Remove
	24	Male	10	Remove
	42	Male	1	Remove

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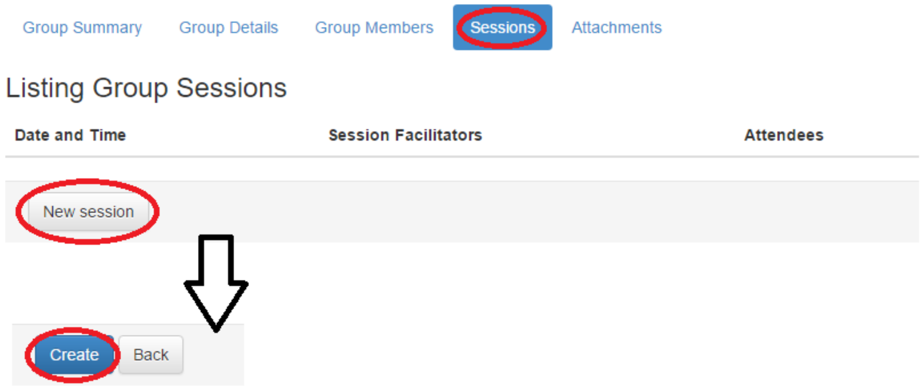
Creating sessions

1. Go to pauasoftware.co.nz
2. Sign in first using the Better Blokes organisational login, then with your personal user login
3. Navigate to Groups, which is found on the sidebar
4. Click on the sessions tab at the top of the window
5. Go to the bottom of the window, and click on "new session"
6. Add the date, time and location of the session
7. Add the facilitators
8. Add the time spent on the session at the bottom of the window
9. Click on Create
10. Click on the session from the list of sessions
11. Add members at the bottom of the page
12. Once done, press save at the bottom

Images



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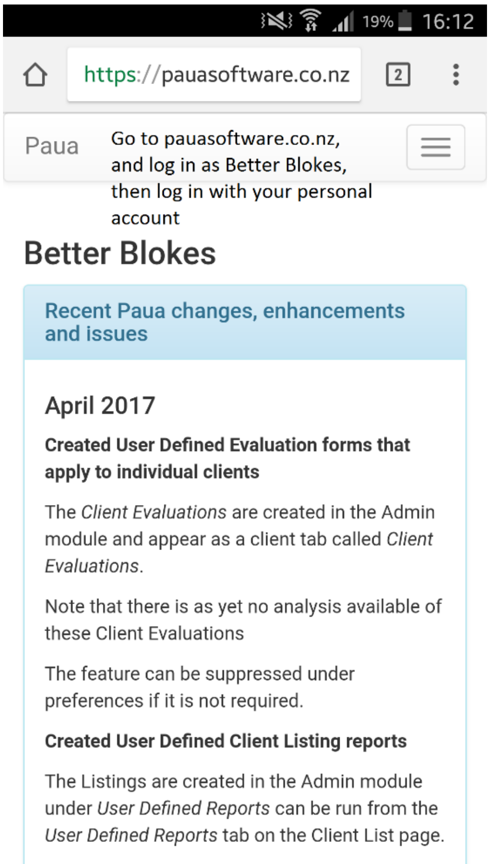
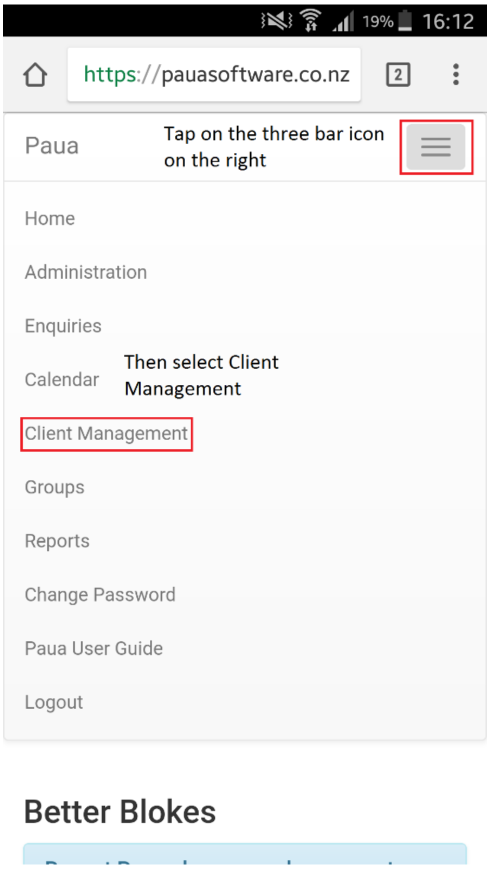
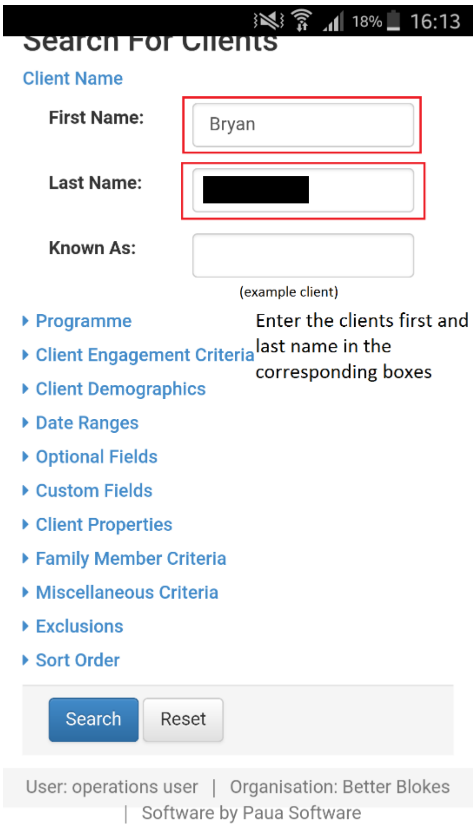
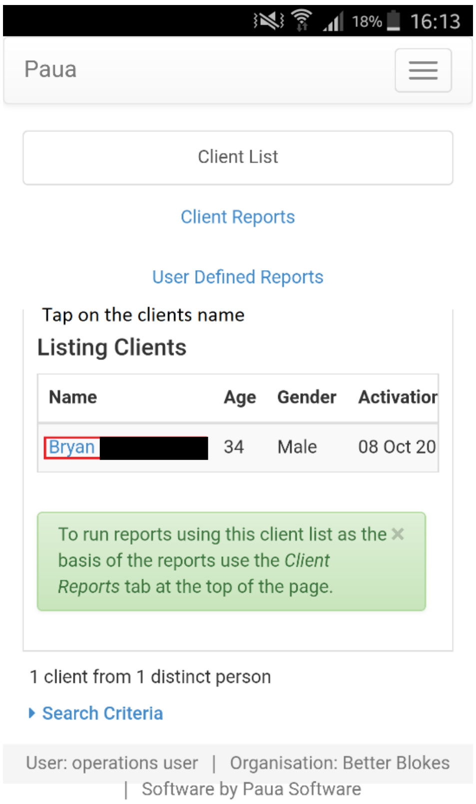
Data Entry on Smart Phone









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