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# Paua Data Entry Methods

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## Programmes and Client Contact Details Dropdowns

Dropdown Maintenance	Optional Person Dropdowns
Outcomes ▾	Optional dropdowns are selected under <a href="#">Preferences</a>
Properties ▾	
User Defined Forms ▾	<b>Client Dropdowns</b>
User Defined Reports	Issues      Programmes      Referral Sources      Relationship Types
Evaluation Forms	Optional Client Dropdowns
Client Assessments	Optional dropdowns are selected under <a href="#">Preferences</a>
Custom Fields	Location      Funding Source
Users	<b>Contact Dropdowns</b>
Change Organisation Password	Contact Types      With Whom
Preferences	Optional Contact Dropdowns
Audit log	Optional dropdowns are selected under <a href="#">Preferences</a>
Paau User Guide	Contact Location

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.

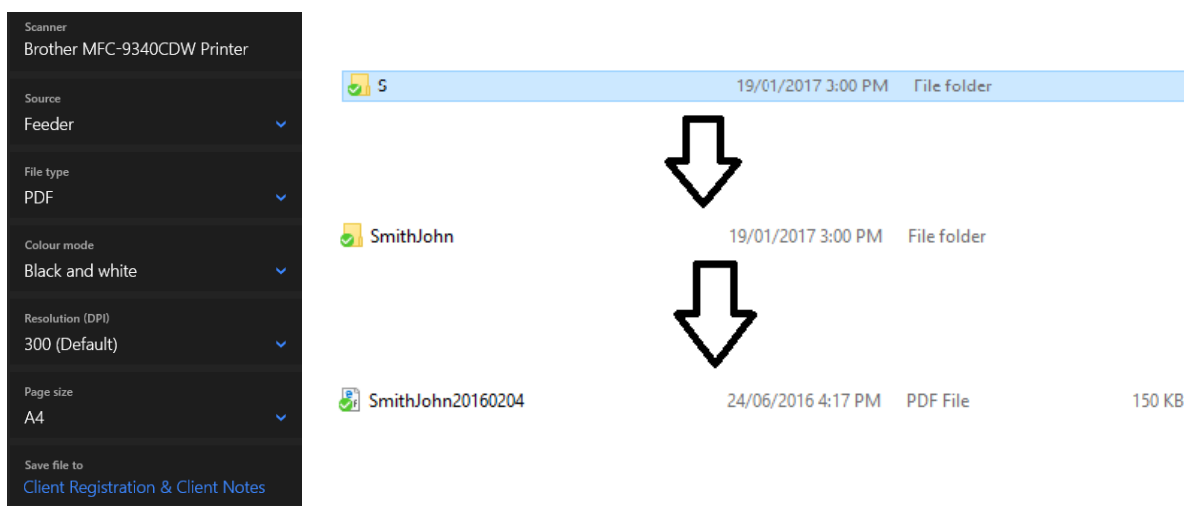
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## Client Data Entry

### 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 4<sup>th</sup> of February 2016 would be SmithJohn20160204

### Images



### Creating a new client

1. Go to [pauasoftware.co.nz](http://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

**Login to Paua**

Organisation:

Password:

➔

**Paua User Login for Better Blokes**

Logon Name:

Password:

## New Client

You can choose to create a new Client from an existing person record if that person is already on file. The person could be either a Client or a Family Member of another Client. ie. One person record can have multiple 'Client Engagements' and can be a Client and also a Family Member for another Client at the same time. If the person is not already on record then you need to create a new person record by clicking "Create New Person".

### Create Client from Existing Person

First Name:  Last Name:

**Client Details**

Client Properties

Family Members

Interested Parties

Goals

Client Contacts

Notes

Issues

Attachments

Outcomes

Forms

Client Assessments

### Personal Details [edit / view details](#)

First Name:

Last Name:

Middle Name:

Known As:

NHI:

Date of Birth:

Place of Birth:

Gender:

Marital Status:

Ethnicity:

Iwi:

### Client Engagement Details [edit](#)

Client Number:

Status:

Referred By:

Programme:

Assigned Worker:

Entry Date:

Location:

Funding Source:

### Future Reminders

Reminder Date

Type

Reminder Message

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Client Details Client Properties Family Members Interested Parties Goals Client Contacts Notes

Issues Attachments Outcomes Forms Client Assessments

### Personal details for Client Luke Skywalker

Person Details **Contact Details** Address All Engagements All Attachments

Contact Details for Luke Skywalker

Home Phone:  Work Phone:

Mobile:  Email:

Notes:

Client Details Client Properties Family Members Interested Parties Goals Client Contacts Notes

Issues **Attachments** Outcomes

### Add Attachment

Description:

File:  No file chosen

## Adding a face-to-face session

1. Go to [pauasoftware.co.nz](http://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

Client Details Client Properties Family Members Interested Parties Goals **Client Contacts** Issues

Attachments Outcomes Forms Client Assessments

Keyword Search

Type	Date	Worker	With Whom	Created By
One to One	01 Jun 2016	David Passell		Levi Godwin-Spondre

New Client Contact Print all Contacts

**New Client Contact**

Contact Type:  Contact Date:

Worker:  With Whom:

Face to Face with client:

Time Spent: Hours  Minutes

Save Final Save Draft Back to list



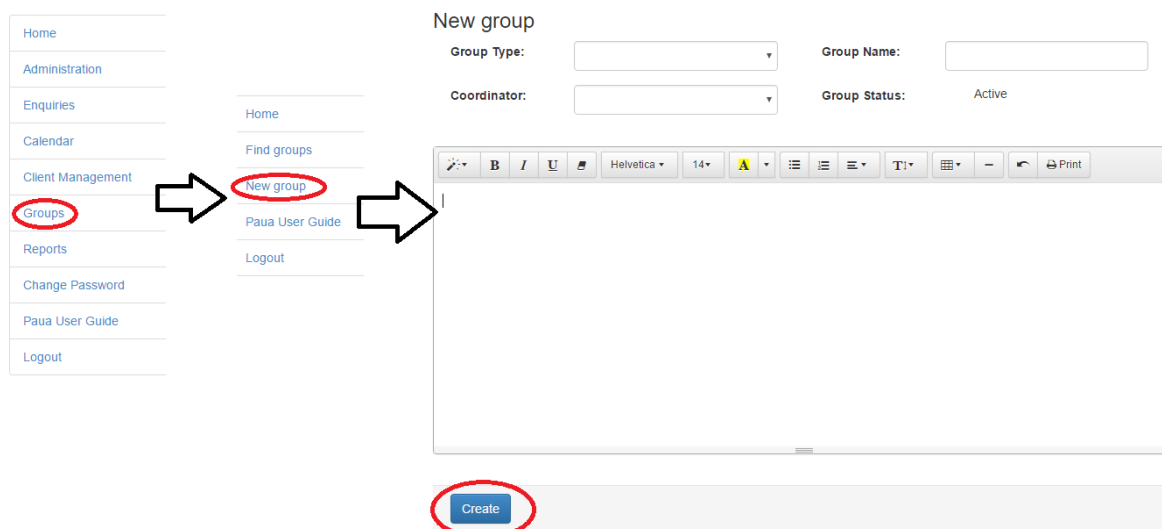
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## Data entry for Groups

### 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

Group Summary Group Details **Group Members** Sessions Attachments

Listing Group Memberships

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

Printable Version

Search for Client

Enter part of the client's name and click search. Then select the required client from the list and click Select.

First Name  Last Name

Name	Status	Programme
John 20 AKL	Inactive	One on one
John 28 AKL	Inactive	One on one

Removing clients from a group

1. Go to pausoftware.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

Group Summary Group Details **Group Members** Sessions Attachments

Listing Group Memberships

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

Printable Version

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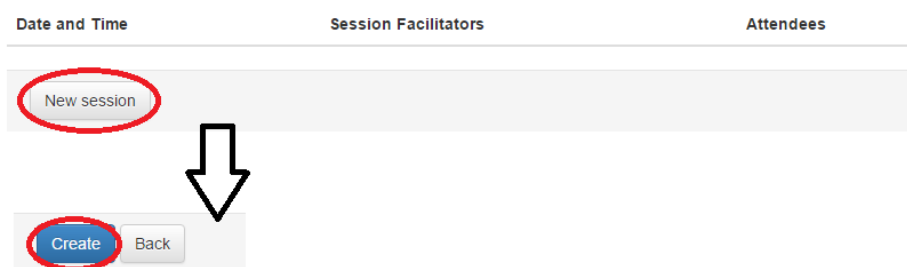
## Creating sessions

1. Go to [pauasoftware.co.nz](http://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

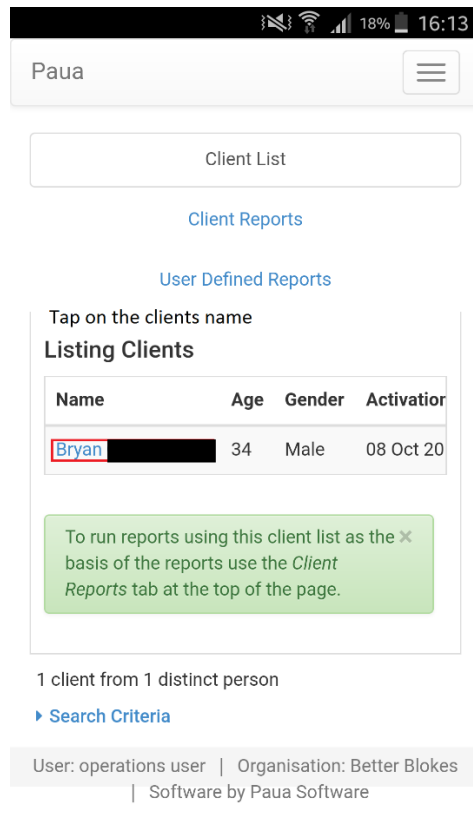
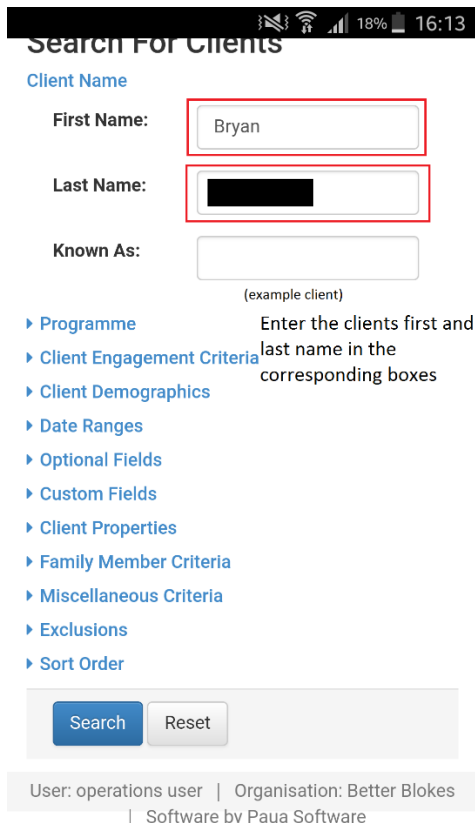
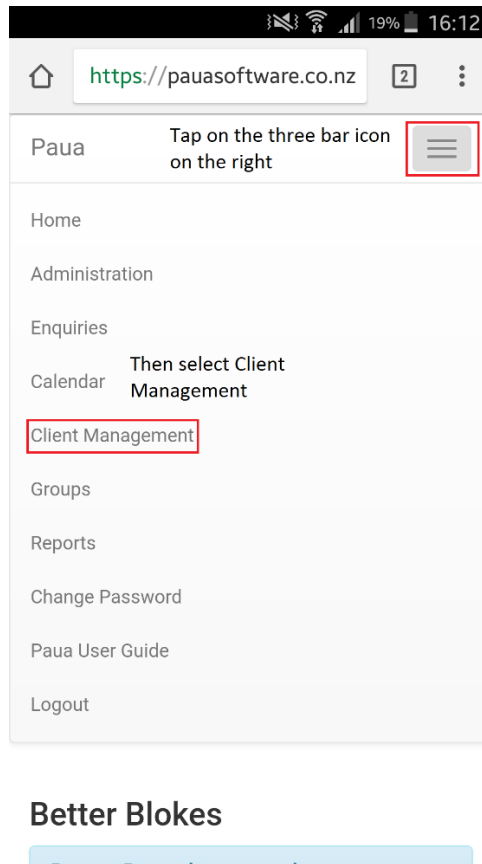
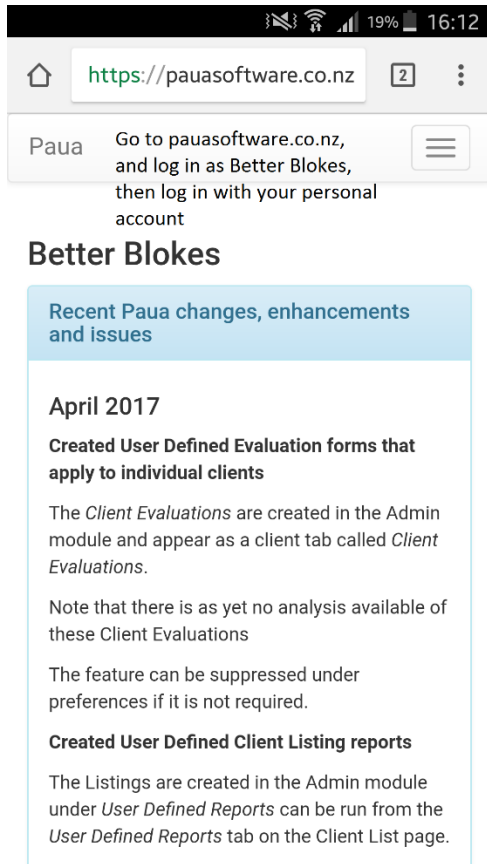
[Group Summary](#) [Group Details](#) [Group Members](#) **[Sessions](#)** [Attachments](#)

### Listing Group Sessions



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## Data Entry on Smart Phone



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Paua

Client List

Client Reports

User Defined Reports

Tap on the clients name

### Listing Clients

Name	Age	Gender	Activator
Bryan	34	Male	08 Oct 20

To run reports using this client list as the basis of the reports use the *Client Reports* tab at the top of the page.

1 client from 1 distinct person

[Search Criteria](#)

User: operations user | Organisation: Better Blokes | Software by Paua Software

Current client: Bryan  
20160026

Programme: One on one

Tap on Client Contacts

Client Details Client Properties

Family Members Interested Parties

Goals Client Contacts Issues

Attachments Outcomes

### Personal Details

[edit / view details](#)

First Name: Bryan

Last Name: [Redacted]

Middle Name:

Known As:

Date of Birth: 01 Jan 1983

Place of Birth: ...

User: operations user | Organisation: Better Blokes | Software by Paua Software

### New Client Contact

Contact Type: [Dropdown]

Contact Date: dd mmm yyyy [Calendar icon]

Worker: David Passell [Dropdown]

With Whom: [Dropdown]

Face to Face with client:

Time Spent: 0 Hours, 0 Minutes

[Save Final](#) [Save Draft](#) [Back to list](#)

User: operations user | Organisation: Better Blokes | Software by Paua Software

Rich text editor toolbar with options for text color, bold, italic, underline, font size, and print.

To save the client contact, use one of these two buttons

[Save Final](#) [Save Draft](#) [Back to list](#)

User: operations user | Organisation: Better Blokes | Software by Paua Software