Paua Data Entry Methods

Bryan Spondre April 24, 2017

Contents

Programmes and Client Contact Details Dropdowns	3
Set Up User Roles	4
Client Data Entry	5
Entering Client Registration Forms	5
Images	5
Creating a new client	5
Images	6
Adding a face-to-face session	7
Images	8
Data entry for Groups	9
Creating a group	9
Images	9
Adding clients to a group	9
Images1	.0
Removing clients from a group1	.0
Images1	.0
Creating sessions1	.1
Images1	.1
Data Entry on Smart Phone1	.2

Programmes and Client Contact Details Dropdowns

Dropdown Maintenance	Optional Person Dropdowns
Outcomes -	Optional dropdowns are selected under Preferences
Properties -	
User Defined Forms -	Client Dropdowns
User Defined Reports	Issues Programmes Referral Sources Relationship Types
Evaluation Forms	Optional dropdowns are selected under Preferences
Client Assessments	Location Europian Source
Custom Fields	Lucatori i unuing Source
Users	Contact Dropdowns
Change Organisation Password	Contact Types With Whom
Preferences	Ontional drondowns are selected under Disferences
Audit log	
Paua 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.

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-

<u>guide.pauasoftware.co.nz/admin/users</u> 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.

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
- 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

_{Scanner} Brother MFC-9340CDW Printer					
Source		🥪 S	19/01/2017 3:00 PM	File folder	
Feeder	~				
File type PDF	~		\checkmark		
^{Colour mode} Black and white	~	🛃 SmithJohn	19/01/2017 3:00 PM	File folder	
Resolution (DPI) 300 (Default)	~		\checkmark		
Page size A4	~	🐉 SmithJohn20160204	24/06/2016 4:17 PM	PDF File	150 KB
Save file to Client Registration & Client Notes	5				

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

- 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			Paua Us	er Log	in for Better Blo	kes
Organisation:	Better Blokes		Logon Nar	ne:	yourusername	
Password:			Password:			
Login			Login			
New Client						
You can choose to cro The person could be Engagements' and ca If the person is not all	eate a new Client from an e either a Client or a Family M In be a Client and also a Fa ready on record then you ne	xisting person record Member of another (mily Member for an eed to create a new	d if that person is alread Client. ie. One person i other Client at the sam person record by click	ady on fil record ca ne time. ting "Cre	le. an have multiple 'Clier ate New Person".	nt
Create Client with I	New Person					
Create Client fro	m Existing Person					
First Name:			Last Name:			
Search						
Client Details Cli Issues Attachme	ent Properties Family ents Outcomes F	r Members Int orms Client A	erested Parties C	Goals	Client Contacts	Notes
	Be edit / View details					
Middle Name:			Last Name: Known As:			
Date of Birth:			Place of Birth:			
Gender: Ethnicity:			Marital Status: Iwi:			
Client Engagem	nent Details edit					
Client Number: Referred By: Assigned Worker: Location:			Status: Programme: Entry Date: Funding Source	:		
Future Reminde	rs					
Reminder Date Add Reminder		Туре	Reminder Message	•		

Client Details	Client Properties Fa	mily Members	terested Parties	Goals	Client Contac	cts Notes	
Issues Attach	nments Outcomes	Forms Client A	ssessments				
Personal deta	ails for Client Luke	e Skywalker					
Person Details	Contact Details A	ddress All Engag	ements All Atta	achments			
Contact Details	for Luke Skywalker						
Home Phone:	1		Work Phone:				
Mobile:			Email:				
Notes:							
0							
Save							
Client Details	Client Properties	Family Member	s Interested	Parties	Goals	Client Contacts	s Notes
				i unico	oodis	Olent Oontaet.	Notes
Issues	Outcom	ies Add Al	tachment				
Listing Atta	achments	Descrip	otion:	Client Re	gistration		
Туре	Description	File:		Choose F	File No file c	hosen	
		Uploa	d File Back				
New Attachm	nent						

Thursday, 19 October 2017

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
- Click on the With Whom dropdown, <u>if</u> 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

- 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: ۳ Contact Date: dd mmm yyyy ****** ۳ Worker: With Whom: * Face to Face with client: Time Spent: Hours 0 v Minutes 0 v $\overleftrightarrow{}^{\star} \quad \mathbf{B} \quad I \quad \underline{\mathbf{U}} \quad \mathcal{B} \quad \text{Helvelica } \quad \mathbf{14} \quad \mathbf{A} \quad \mathbf{v} \quad \equiv \quad \mathbf{\Xi} \quad \equiv \quad \mathbf{T} \mathbf{v} \quad \boxplus \mathbf{v} \quad - \quad \mathbf{v} \quad \mathbf{\Theta} \text{Print}$ ve Final Save Draft Back to list

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

Home		New group
Administration		Group Type: Group Name:
Enquiries	Home	Coordinator: Group Status: Active
Calendar	Find groups	
Client Management	New group	V·r B I U B Helvenca + 14+ A * III III+ III+ III+ III+
Groups	Paua User Guide	
Reports	Logout	
Change Password		
Paua User Guide		
Logout		
		=
		Create

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

Thursday, 19 October 2017

imary Group Details	Group Mem	ibers Sessi	ions Attachments				
Group Members	ships						
	Age	Gender	Sessions Attended				
		Male	6	Remove			
	24	Male	6				
	19	Male	22	@ Remove	Search for Client	t	
	40	Male	5	i Remove €			
	40	Male	3	■ Remove	Enter part of the client's n	ame and click search	
	59	Male	8	@ Remove	Then select the required	client from the list and o	click Select.
	34	Male	16	會 Remove	L Eirst Name		et Name
	69	Male	3	窗 Remove		La	st Name
	42	Male	17	💼 Remove	Name	Status	Programme
	44	Male	28	Remove	John 20 AKL	Inactive	One on one
	34	Male	5	i Remove €	John 28 AKL	Inactive	One on one
			16	會 Remove			
	39	Male	1	會 Remove			
	24	Male	10	窗 Remove			
	42	Male	1	n 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

Group Summary Group Details Group Members Sessions Attachments

Listing Group Memberships

Name	Age	Gender	Sessions Attended	
		Male	6	面 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	n Remove
	24	Male	10	n Remove
	42	Male	1	n Remove
New Member Printable Version				

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

Group Summary	Group Details	Group Members	Sessions	Attachments	
Listing Group	Sessions				
Date and Time		Session Facilit	ators		Attendees
New session	_				
Create Back					

Data Entry on Smart Phone



Thursday, 19 October 2017

Client List Client Reports User Defined Reports ap on the clients name sting Clients stame Age Gender Activation isyan 34 Male 08 Oct 20 To run reports using this client list as the X basis of the reports use the Client Reports tab at the top of the page. Hiet from 1 distinct person act of the reports user (organisation: Better Blokes) Software by Paua Software Software by Paua Software W Client Contact Software by Paua Software W Client Contact Software by Paua Software Software by Paua Software W Client Contact Software by Paus Software Software by Paus Software Software by Paus Software Software by Paus Software To save the client contact, use one of these tweetons Software by To save the client contact, use one of these tweetons Software interester Blokes Software brace With Whom: Software interester Software Softw	aua		ttps://pauasoftware.co.nz/c 2	
Client Reports user Defined Reports ap on the clients name sting Clients wame Age Gender Activation ayan 34 Male 08 0ct 20 To run reports using this client list as the X basis of the reports use the Client Reports roperations user Organisation: Better Blokes Software by Paua Software > Software by Paua Software * operations user Organisation: Better Blokes Software by Paua Software * operations user Organisation: Better Blokes Software by Paua Software * operations user Organisation: Better Blokes * operations user Organisation: Better Blokes Software by Paua Software * operations user Organisation: Better Blokes * operations user Organisation: Better Blokes <tr< td=""><td></td><td>Client List</td><td>Paua</td></tr<>		Client List	Paua	
User Defined Reports ap on the clients name sting Clients Name Age Gender Activation Tap on Client Contacts Sting Client Details Client Details Client Details Client Details Client Contacts Sting Client Details Interested Parties To run reports using this client list as the X Basis of the reports use the Client Reports tab at the top of the page Iters Name: Bryan Last Name: Bryan Last Name: Software by Paua Software Software by Paua Software Software by Paua Software Software co.nz/c To save the client contact, use one of these to Software by Paua Software Software by Paua Software Software by Paua Software Software co.nz/c To save the client contact, use one of these to Software by Paua Software Software by Paua Software <td c<="" td=""><td></td><td>Client Reports</td><td>Current client: Brvan</td></td>	<td></td> <td>Client Reports</td> <td>Current client: Brvan</td>		Client Reports	Current client: Brvan
ap on the clients name sting Clients tame Age Gender Activation gram 34 Male 08 Oct 20 To run reports using this client list as the × basis of the reports use the <i>Client</i> <i>Reports</i> tab at the top of the page. To run reports using this client list as the × basis of the reports use the <i>Client</i> <i>Reports</i> tab at the top of the page. To run reports using this client list as the × basis of the reports use the <i>Client</i> <i>Reports</i> tab at the top of the page. To orun reports using this client list as the × basis of the reports use the <i>Client</i> <i>Reports</i> tab at the top of the page. To orun reports using this client list as the × basis of the reports use the <i>Client</i> <i>Reports</i> tab at the top of the page. To orun reports use of the page. To orun reports use of the page. To orun reports use of the page. First Name: Bryan Last Name: Middle Name: Known As: Date of Birth: 01 Jan 1983 Place of Birth: To save the client Contact To save the client contact, use one of these to buttons To save the client contact, use one of these to buttons To save the client contact, use one of these to buttons To save the client contact, use one of these to buttons Sove Final Save Draft Back to list User: operations user Organisation: Better Blocks Sove Final Save Draft Back to list User: operations user Organisation: Better Blocks Sove Final Save Draft Back to list User: operations user Organisation: Better Blocks Sove Final Save Draft Back to list Sove Final Save Dr	Us	ser Defined Reports	20160026	
sting Clients Name Age Gender Activation Bivan 34 Male 08 To run reports using this client list as the × basis of the reports use the Client Reports tab at the top of the page. First Name: Personal Details <td>Tap on the clie</td> <td>nts name</td> <td>One on one</td>	Tap on the clie	nts name	One on one	
Name Age Gender Activatior styan 34 Male 08 Oct 20 To run reports using this client list as the × basis of the reports use the <i>Client Reports</i> tab at the top of the page. First Name: Bryan Last Name: Bryan Bryan Last Name: Bryan Bryan Last Name: Bryan Bryan Last Name: Bryan Bryan Last Name: Bryan Bryan Bryan Last Name: Bryan Brya	isting Clien	ts	Tap on Client Contacts	
Stylen 34 Male 08 Oct 20 Family Members Interested Parties Goals Client Contacts Issues Attachments Outcomes Personal Details edit / view details First Name: Bryan Last Name: Bryan Bryan Last Name: Bryan Bryan Contact Date: Or Vith Whom: To save the client contact, use one of these to buttons Save Draft Back to list User: Organisation: Better Block Bryan Bryan<	Name	Age Gender Activatior	Client Details Client Properties	
Goals Client Contacts Issues To run reports using this client list as the × basis of the reports use the Client Reports tab at the top of the page. Personal Details edit / view details First Name: Bryan Last Name: Middle Name: Known As: Date of Birth: Of Jan 1983 Place of Birth: Of Loss	Bryan	34 Male 08 Oct 20	Family Members Interested Parties	
To run reports using this client list as the × basis of the reports use the <i>Client</i> <i>Reports</i> tab at the top of the page.			Goals Client Contacts Issues	
Reports tab at the top of the page. Personal Details edit / view details lient from 1 distinct person earch Criteria r: operations user Organisation: Better Blokes Software by Paua Software Ittps://pauasoftware.co.nz/c Ittps://pauasoftware.co.nz/c <	To run reports basis of the re	s using this client list as the × eports use the <i>Client</i>	Attachments Outcomes	
lient from 1 distinct person earch Criteria #: operations user Organisation: Better Blokes Software by Paua Software Software by Paua Software Place of Birth: OI Jan 1983 Place of Birth: Date of Birth: OI Jan 1983 Place of Birth: Date of Birth: OI Jan 1983 Place of Birth:	Reports tab at	t the top of the page.	Personal Details edit / view details	
lient from 1 distinct person earch Orfteria f: operations user Organisation: Better Blokes Software by Paua Software Software by Paua Software Last Name: Middle Name: Known As: Date of Birth: O 1 Jan 1983 Place of Birth: O 2 Jan 1983 O 2 Jan 1983 Jan 20 Jan 20 Jan 1983 Jan 20 Jan 20			First Name: Bryan	
And it ware: Widdle ware: Software by Paua Software Software by Paua Software Software by Paua Software Date of Birth: Date of Bir	client from 1 di	stinct person	Last Name:	
#: operations user Organisation: Better Blokes Software by Paua Software Date of Birth: 01 Jan 1983 Place of Birth: 01 Jan 1983 <	Scaren ontena		Known As:	
Place of Birth: Place of Birth: () () () () () () () () () () () () () (er: operations u Sof	user Organisation: Better Blokes ftware by Paua Software	Date of Birth: 01 Jan 1983	
Itps://pauasoftware.co.nz/c Itps://pauasoftware	1 001		Place of Birth:	
Ittps://pauasoftware.co.nz/c Ittps://pauasoftware.co.nz				
ttps://pauasoftware.co.nz/c ew Client Contact contact Type: Contact Date: dd mmm yyyy Worker: David Passell Vith Whom: ************************************		in 17% _ 16 :1 الله الم	4 3×3 7 18% 1	
A Contact Type: Contact Date: dd mmm yyyy Worker: David Passell Vith Whom: * Contact Date: Minutes 0 Minutes 0 Minutes 0 * B I <	ttps://pa	uasoftware.co.nz/c 2	ttps://pauasoftware.co.nz/c 2	
Contact Type: Contact Date: dd mmm yyyy Worker: David Passell Vith Whom: vith client: rime Hours Spent: 0 Minutes 0 Vith Whom: 0 Vith Whom: vith client: Time Hours Spent: 0 Vith Whom: vith client: To save the client contact, use one of these two buttons Save Final Save Draft B I U 14 Viti = = = v Tiv Viti = = v Tiv Viti = v Tiv	ow Client	t Contact		
Contact Date: dd mmm yyyy Worker: David Passell Vith Whom: • *ace to Face • •vith client: • Time Hours Spent: • • <td></td> <td></td> <td>► ⊖ Print</td>			► ⊖ Print	
Contact Date: dd mmm yyyy Worker: David Passell David Passell Vith Whom: *ace to Face vith client: Time Hours Spent: O Vithwes O * B I I I I I I I I I Vith I <	oontaet Type.	T		
Worker: David Passell With Whom: * *ace to Face *iace to Face *imme Hours Spent: O Minutes O * B I <	Contact Date:	dd mmm yyyy 🛗	1	
Vith Whom: ▼ Face to Face ▼ vith client: ▼ Time Hours Spent: 0 0 ▼ Minutes 0 0 ▼ Save the client contact, use one of these two buttons Save Final Save Draft B I U U U I I I I U U I I I I U U U I I I I U	Worker:	David Passell		
With Whom: Face to Face with client: Time Hours Spent: 0 ▼ Minutes 0 ▼ Minutes 0 ▼ I U ■ ↓ 14▼ I ↓ ■ ↓ 14▼ User: operations user ↓ Organisation: Better Block		David Passeli		
Face to Face with client: Time Hours Spent: 0 ▼ Minutes 0 ▼ B I U B ▼ 14▼ ↓ □ □ ↓ 14♥ ↓ □ ↓ 14♥ ↓ □ □ ↓ 14♥ ↓ □ □ ↓ 14♥ ↓ □ ↓ 1	With Whom:	•		
Fine Hours Spent: 0 ▼ Minutes 0 ▼ To save the client contact, use one of these two buttons Save Final Save Draft B I U ■ ▼ 14▼ ▼ ■ I U ■ ▼ 14▼ ▼ ■ Final Save Draft Back to list User: operations user Organisation: Better Block	Face to Face with client:			
Spent: 0 ▼ Minutes 0 ▼ 0 ▼ To save the client contact, use one of these two buttons Save Final Save Draft B I I I I I <t< td=""><td>Time Hou</td><td></td><td></td></t<>	Time Hou			
Minutes □ □ ▼ □ ▼ □ ▼ □ ▼ □ ▼ □ ▼ □ ▼ □ ▼ □ ▼ □ ▼ □ ▼ □ ▼ □ ▼ □ ■ □ ■ □ ■ □ ■ □ ■ □ ■ □ ■ □ ■ □ □ □ □ □ □ □ □ □ □ □ □ □ □ □ □ □ □ □ □ □ □ □ □ □ □ □ □ □ □ □ □	Spent: 0	rs		
0 ▼ B I I </td <td>Min</td> <td>rs •</td> <td></td>	Min	rs •		
★ B I		rs ▼ utes	To save the client contact, use one of these tw	
L ▼ 🗮 ☱ ≡ ▼ TI▼ ⊞▼ − → ⊖ Print User: operations user Organisation: Better Blo	0	v utes	To save the client contact, use one of these tw buttons	
User: operations user Organisation: Better Blo	0 B <i>I</i>	rs v utes v <u>U</u> C v 14v	To save the client contact, use one of these tw buttons Save Final Save Draft Back to list	
	0 ★:• B I A • ∷≡ 1	rs ▼ utes ▼ <u>U</u>	To save the client contact, use one of these two buttons Save Final Save Draft Back to list	

13