Prognotus Documentation

Release 1.1.12

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Prognotus is case management software for human service organizations. It aims to ease note taking, information sharing within the organization, and goal tracking.

CHAPTER

ONE

GETTING STARTED WITH PROGNOTUS

HIPAA Compliance & Computer Security

The HIPAA Security Rule covering electronic Protected Health Information (ePHI) extends to the personnel of a covered entity's workforce even if they work at home. For complete information on Mainstream Living and Community Support Advocate's HIPAA security policies contact the IT Specialist.

Mainstream Living's HIPAA Privacy Notice:

- http://www.mainstreamliving.org/documents/filelibrary/hipaa_files/2013_Notice_of_Privacy_Practices_962308FB12416.pdf

Community Support Advocate's HIPAA Privacy Notice:

- http://www.teamcsa.org/wp-content/uploads/2013/04/CSA-Notice-of-Privacy-Practices.pdf

Access Policy

Access to information is granted based on an individual's job responsibilities. Prognotus requires a user name and password, and information is limited by group assignments. Network connections to Prognotus will use high grade end to end encryption (TLS 1.0 or better).

Operating Systems (e.g. Windows XP) or Browsers (e.g. Internet Explorer 6 or less) that do not support TLS 1.0 or better are not supported.

Password Security

- Passwords must be kept private; Never share passwords with anyone.
- Passwords must be at least eight characters long and should contain at least two number or symbols.
- Do not use you user name or password outside of the company, such as other websites.
- Prognotus implements password aging for increased security.

ePHI Privacy & Prognotus Use

- If not using a company *computer*, you must ensure that your computer meets the minimum requirements listed under *Prognotus Requirements*, and also prepare your computer as described in section *Working at Home*.
- Be aware of persons within view of your screen (e.g. a person standing behind you can read the protected health information).
- Do not access Prognotus on a public computer, or other computer not owned by the company or you.

- Avoid accessing Prognotus over a public or unsecured wireless network. This is a security hazard.
- Log off when finished.

Working at Home

Your company should have laptops for employees to use for the purpose of working outside the office. If you plan to work at home, the use of a company portable *computer* is preferred. The company provided computers meet the HIPAA security policy requirements, and include additional security measures. If you choose to use your home computer you are responsible for meeting the security requirements detailed in *Prognotus Requirements*, and preparing our computers as described in this section.

Working at Home Points to Remember:

- Only use wireless networks with caution.
- Turn off your wireless connection when not in use.
- Don't use defaults with your wireless router.
- Avoid accessing HIPAA information over an unsecured wireless network.
- Do not share your files (e.g. Windows File & Printer Sharing should be off).
- Use an agency provided flash storage devices only.
  - Currently the IronKey is the preferred secure option offered.
- Encrypt HIPAA protected data on portable storage devices (laptops, USB devices, CD-ROMs, DVDs, etc).
  - AxCrypt (http://www.axantum.com/AxCrypt/) is a free utility and can be installed on your home computers also.
- Do not store work related data on personal computers.

Prognotus Requirements

Internet Connection

An *internet* connection is required to use Prognotus. A dial-up connection will work, however DSL or Cable connection will give the best experience.

Computer Hardware & Software

- **Monitor:** Supports a minimum of 800x600 resolution.
- **Modern Operating System:** Windows 7, Windows Vista, OS X, Linux, or other *Operating System*. If Firefox runs fine on the *OS* so will Prognotus, however for security reasons a recent & supported OS is best (Windows 2000, Windows XP, Windows ME, Windows 98 and lower are not supported).
- **Anti-Virus Software** (MS Windows Only): Installed, active, updated and kept current. (See: *Virus*)

Warning: Only one Anti-Virus program should be installed at a time. If you don't have current/up-to-date anti-virus protection, one of the free for personal use Anti-Virus software listed below are acceptable options.

- AVG Anti-Virus Free Edition (http://free.avg.com/)

- Avira AntiVir Personal Edition (http://www.free-av.com/)
- Bitdefender (http://www.bitdefender.com/solutions/free.html)
- Panda Cloud (http://www.cloudantivirus.com/en/)

Note: Microsoft Security Essentials is not an acceptable anti-virus solution.

- **Anti-Spyware Software** (MS Windows only): Installed, active, updated, and kept current. (See: *Spyware*)

Note: Multiple Anti-Spyware products can be installed at once. One of the free Anti-Spyware solutions listed is acceptable.

- Malwarebytes (http://www.malwarebytes.org/)
- Spybot S&D (http://www.safer-networking.org/en/home/index.html)
- Windows Defender (http://www.microsoft.com/protect/computer/spyware/windowsdefender.mspx)
  - Included with the above listed "Microsoft Security Essentials".
  - Windows Defender already comes with Windows Vista and greater.

- **Firewall Software:** Installed, active, updated, and kept current. (See: *Firewall*)

Note: Use only one. One of the free products listed is acceptable.

- Comodo (http://www.personalfirewall.comodo.com/)
- Microsoft Windows Firewall (Comes with Windows XP SP3 and greater)
- ZoneAlarm (http://www.zonealarm.com)

- **PDF File Viewer:** Compatible with Adobe Reader 5.0 or above. Needed for viewing and printing reports. Modern browsers not have a PDF viewer built-in.(See: *PDF*)

Note: Only required for reports. Any of the these will work. Foxit is lighter and faster.

- Foxit (http://www.foxitsoftware.com/)
- Adobe Reader (http://get.adobe.com/reader/)

- **Office Suite:** Or any single spreadsheet program for viewing and manipulation of CSV reports. (See: *CSV*)

Note: Only required for reports. Any will work.

- **Free Office Suites**
  - LibreOffice (http://www.libreoffice.org/)
  - OpenOffice.org (http://www.openoffice.org/)
- **Non-free Office Suites**
  - Corel Office Suite (http://www.corel.com)
  - Kingsoft office (http://www.kingsoftstore.com/kingsoft-office-freeware.html) - Freeware Version

   - Microsoft Office (http://office.microsoft.com/)

- **Web Browser:** A supported browser with latest patches and kept updated. (See: *Web Browser*)

Note: Firefox is the recommended browser for Prognotus. Firefox has built-in spell checking, which is nice when writing *Progress Notes* and is used for testing during development.

- Mozilla Firefox (http://www.mozilla.com/en-US/firefox/) - Free/Open Source

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- **File Sharing (Peer-to-Peer)** software is **NOT** installed on the computer accessing Prognotus, such as LimeWire, Gator, Morpheus, DC++, BearShare, Kazaa, Bonzai, Buddy, or Grokster.
- **Key Logging**: *Keylogger* software is **NOT** installed on the computer accessing Prognotus.

Web Browser

Prognotus is a *web based application* which is accessed via a *web browser*. Firefox (http://www.mozilla.com/en-US/firefox/) is the primary browser used during testing and development, and is therefore the recommended browser. If you should experience issues while using another browser try Firefox. Firefox is free and also has built-in spell checking, which is a useful feature.

Browser	Support	Spell Check
Firefox	Fully Supported	Yes
Google Chrome	Supported	Yes
Internet Explorer 9+	Works? (Timeout issues)	No
Opera	Works	Yes
Safari	Works	Yes

Browser Settings

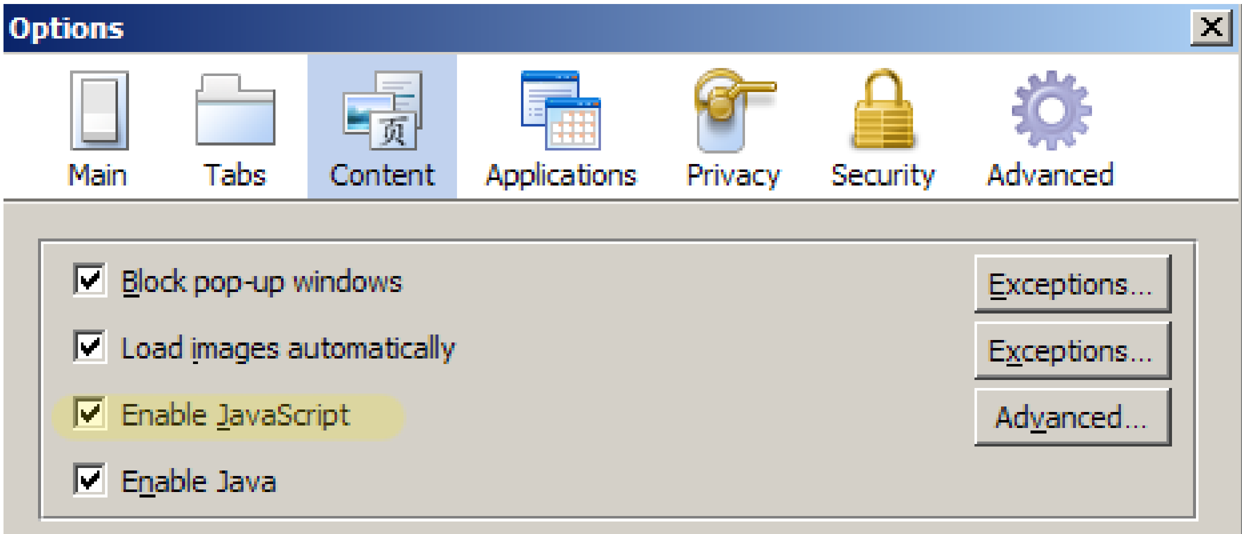
Firefox *Menu* Differences in Windows, Linux, and Mac

> **MS Windows:** *Tools → Options...*
>
> **Linux:** *Edit → Preferences*
>
> **Mac OS X:** *Firefox → Preferences...*

Prognotus uses JavaScript (a scripting language) and *cookies* for some functionality and should be turned on in your browser.

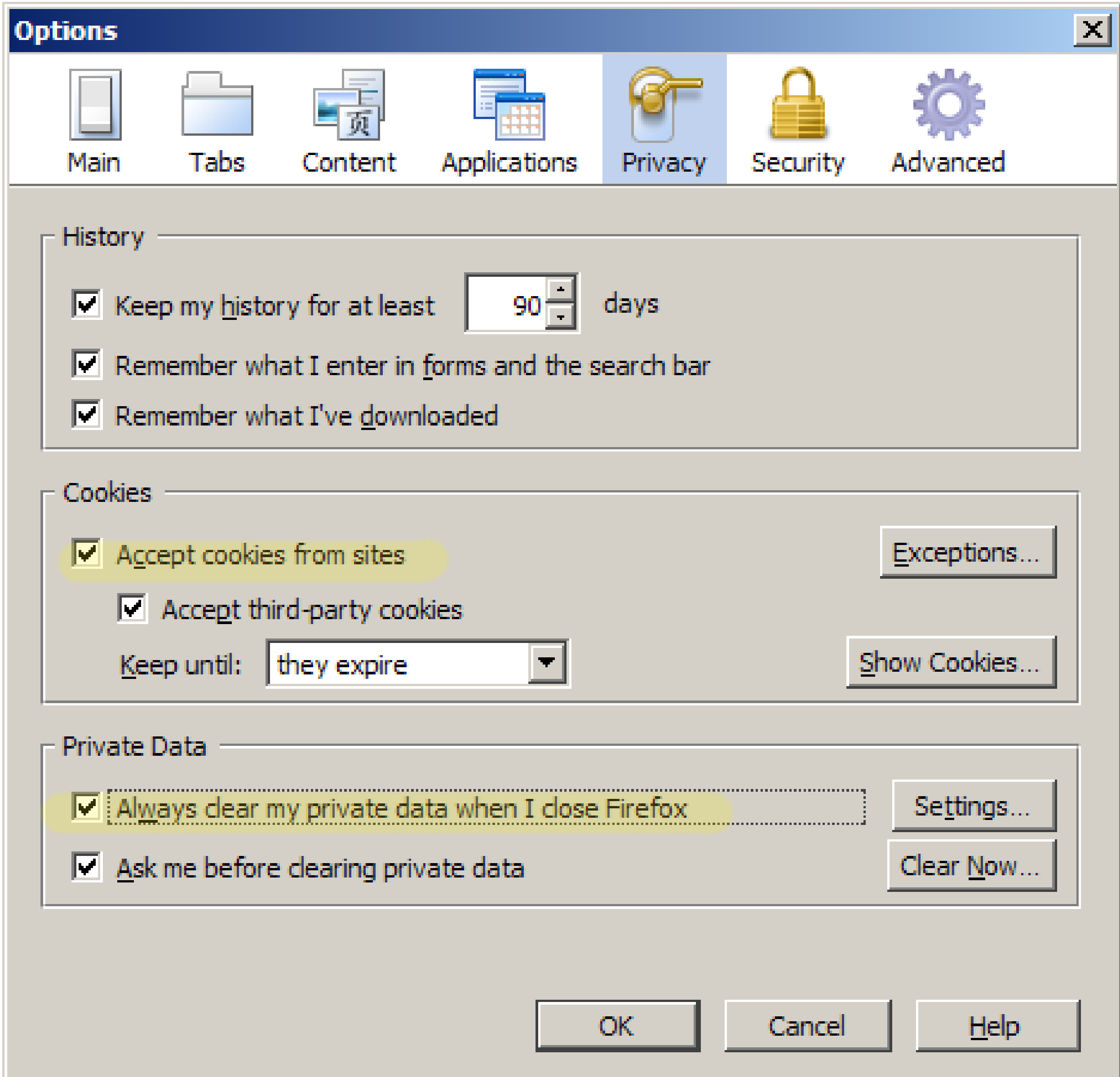
Javascript in Firefox

Click *Tools → Options...* and then click the “Content” icon. Ensure that “Enable Javascript” is checked.



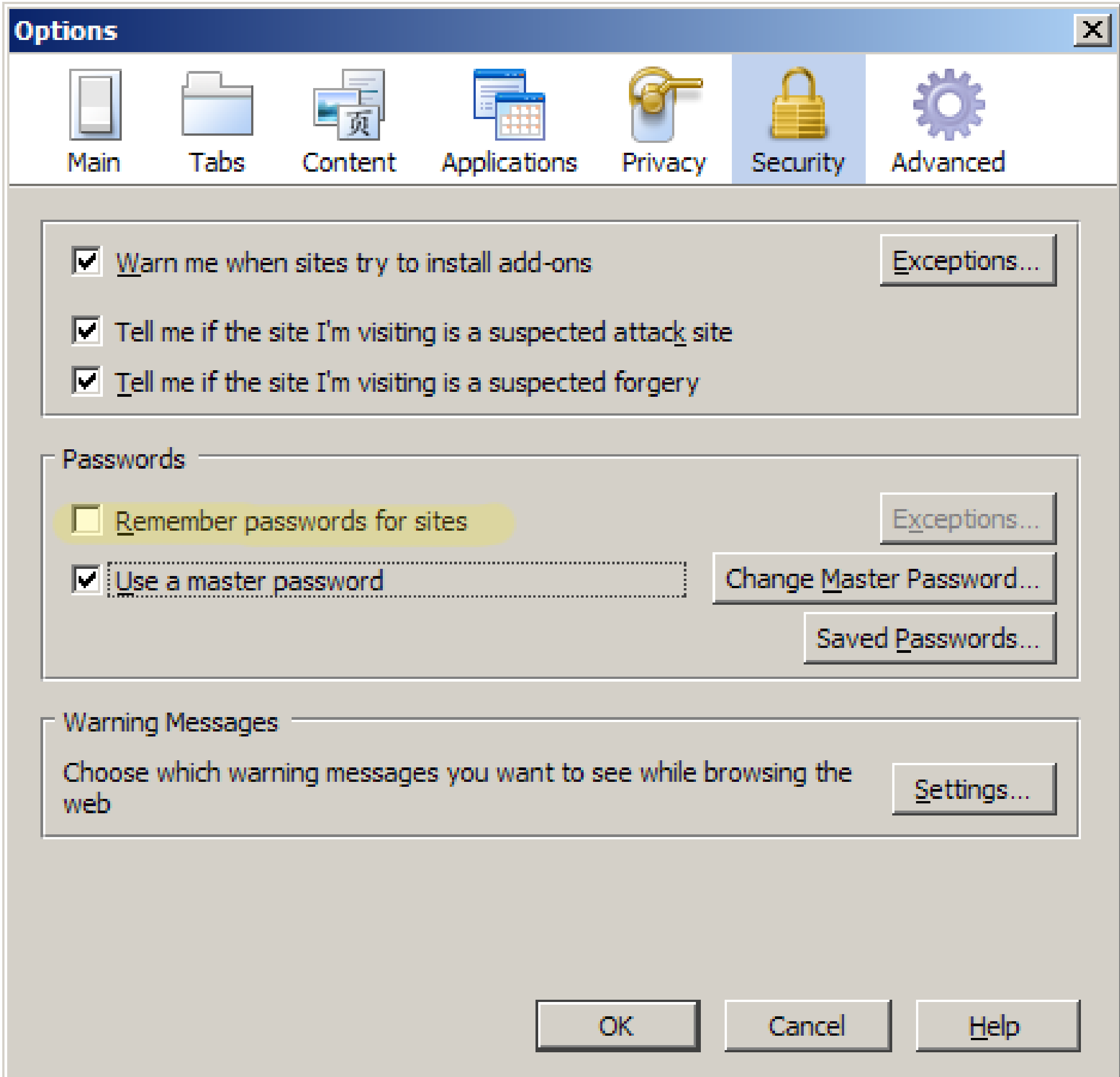
Cookies & Privacy in Firefox

Click *Tools* → *Options...* and then click the "Privacy" *icon*. Ensure that "Accept cookies from sites" is checked. It can't hurt to check "Always clear my private data when I close Firefox". Click "Settings..." and check the options listed then click "OK".



Password Security in Firefox

Allowing you browser to remember passwords is generally a bad idea, especially with passwords that access HIPAA protected information or other private information. To disable password storage in Firefox click *Tools* → *Options...* and then click the "Security" icon. Ensure that "Remember passwords for sites" is **unchecked**.



In the event that you plan to leave the "Remember passwords for sites" checked, then also check "Use a master password" and set that also. This will help secure your stored passwords to some extent.

CHAPTER

TWO

PROGNOTUS BASICS

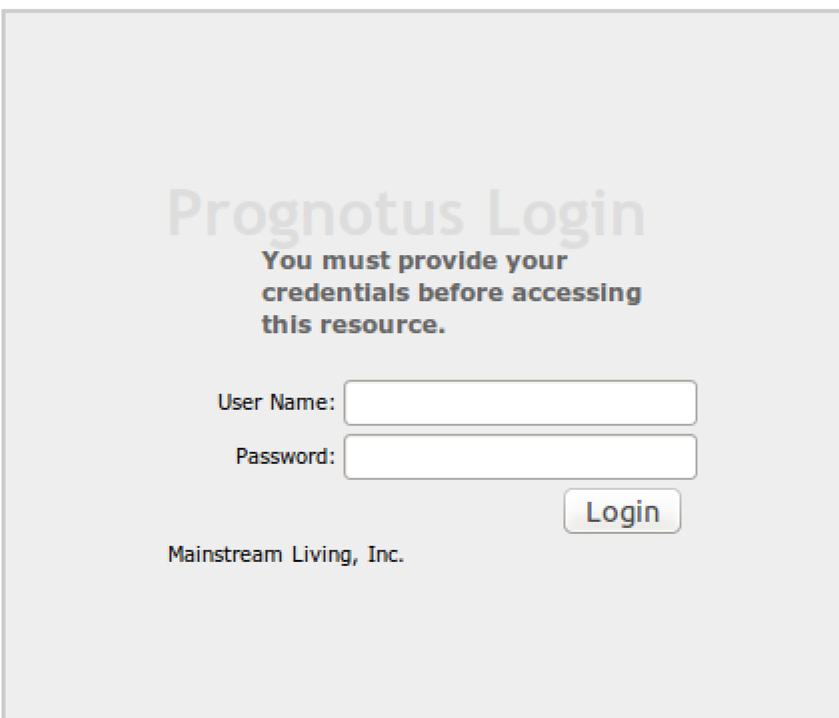
Logging In

Open a browser and enter the Prognotus *URL* (web address) http://www.prognotus.net into the *Location Bar*. Choose the correct login link for your company.

You may also want to *bookmark* this *page* for future reference.

Login Box

You should now see the Prognotus login box. Your company name will be displayed near the bottom of the login box.



To begin, log in using the “User Name” and “Password” provided to you.

If you password has expired you will be directed to the password form. You will be able to use Prognotus until a new and valid password has been entered.

If you do not know your password or user name contact an administrator and request that your password be reset.

Overview

After logging in the first page displayed is likely the *Dashboard*.

The Prognotus *The Menu* is displayed horizontally near the top of the page.

The upper right shows your "display name", current group you are in, and a logout link. *Click* the Logout link when finished using Prognotus.

Click your name to go to your profile; if you are in multiple groups you can change which is your current (active) group there.

Note: Access to clients is limited by your "current group". If you belong to multiple groups you will need to switch your *Current Group* to access that group's client information.

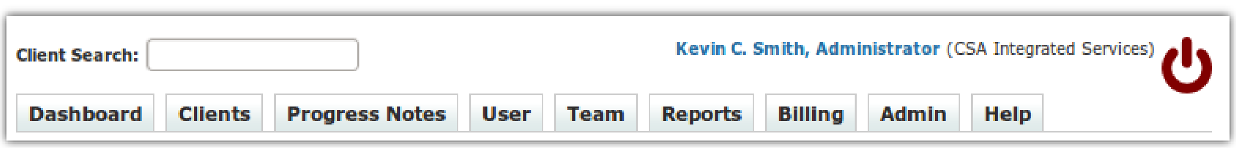
Quick Start

Most users will need to create *Progress Notes*. If you wish to get starting writing notes immediately follow the instructions below.

Write a Progress Notes

1. *Log into Prognotus*.
2. Locate the *Client* you wish to create a Progress Note for.
   - Use the "Client Search" field at the top left by entering first, last name, or nickname of the Client.
   - Browse through the displayed listing.
3. *Click* "Add Note" on the Client you wish to create a note for.
4. Write your *Progress Note* completing all fields as required.
5. Change "Status" to "Completed/Signed".
6. *Click* "Submit Completed/Signed Note".

Your Prognotus Profile



Click your "Display Name" near the top right of the *page* to edit your profile.

Note: Your current (active) group is shown near your "Display Name".

Change the "User Title" and "Display Name" as needed. Add any credentials to the end of your Display Name (e.g. John Doe, M.D.).

Warning: These fields are used in the reports and should be your legal name and real job title.

Current Group

To change your current group, use the provided select field. You are only able to change to a group to one you are a member of.

The Menu

The Prognotus *menu* has 5-7 categories depending on the level of access.

First two tabs will be used the most.

Dashboard	Clients
	Caseload
	Favorites
	All Clients
	Clients by Funder

The third will help you lookup/manage Progress Notes.

Progress Notes
Recent
Incomplete
Drafts
Search
Follow-up
Caseload Unreviewed
New Unreviewed
All Unreviewed
Pass

The remaining tabs are less useful to most users.

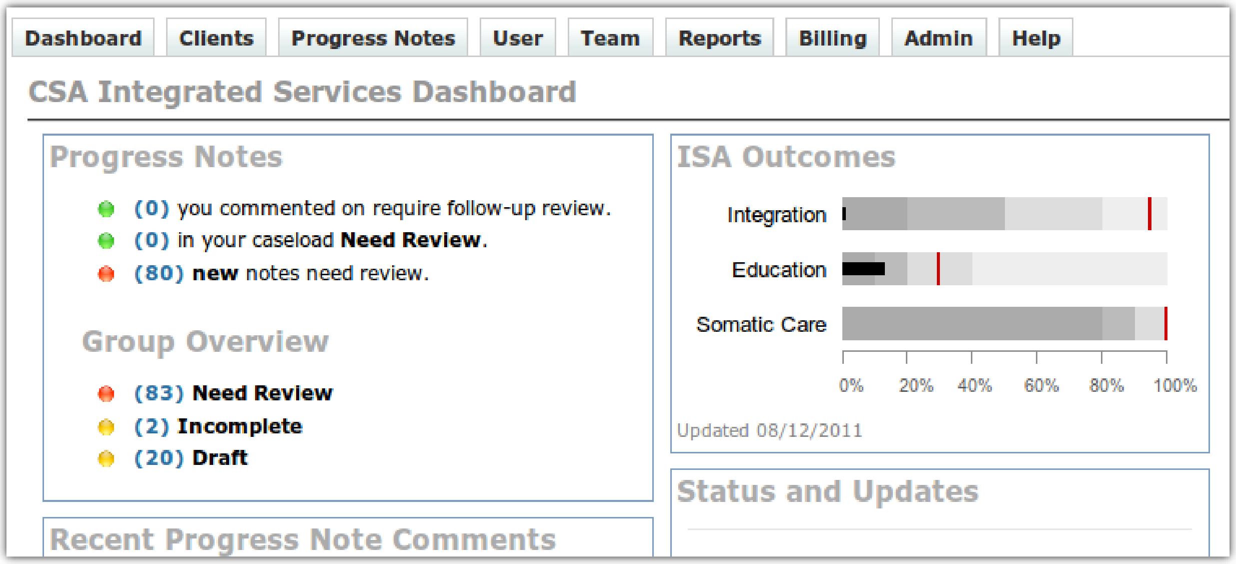
User	Team	Reports	Billing	*Admin*
Time Card	Team List	Print/PDF	List Billings	*Current Users*
Caseload Billable Activity	Group Billable Activity	CSV Export	New Billing	*List Users*
Caseload Plans	Client Plans	Charts		*Add Client*
My Client Plans				*Admin Dashboard*
				Service Types
				Add User

Help menu contains links to this manual.

Help
Manual

Dashboard

The Prognotus Dashboard, like the dashboard of a car, is designed to give the user with at a glance information. Contents of the Dashboard may vary by a user's group.



Status and Updates

Displays important messages.

Progress Notes

Displays your total notes marked "Incomplete". These are notes that need fixed in some way (e.g. rewritten, finished). Those in the QA group will see a total count of all notes in the current group marked "Incomplete" as well as "Needs Review". Old drafts are also displayed here.

See also:

Quality Assurance for more information.

Recent Progress Note Comments

Displays comments made on any notes you have written. Once a QA person has commented on a note, standard users are able to add additional comments to the note.

Events

- Displays the oldest five *Events* that have not been linked to a *Progress Note*, and also provides a total count of unlinked notes.
- Lists the last seven days of jail *Events* for the current group.

Plans

Displays the five oldest expired *Plans* that *you* created, and a total expired count.

Clients

Caseload

Lists the *Clients* that have been assigned to you (your caseload).

Favorites

Lists the *Clients* that you marked as a favorite.

All Clients

Lists all clients in your current group.

Progress Notes

Recent

Lists your *Progress Notes* starting with the most recently *updated*.

Incomplete Notes

Lists *Progress Notes* that are tagged “Incomplete” in the *Quality Assurance* review process.

Drafts

List notes that you have saved as a draft.

Search

Provides a form for searching *Progress Notes*.

Follow-up

Lists *Progress Notes* that are tagged “Needs Review” and have been commented on by the QA user. Used only by the QA group therefore not visible to all users.

Caseload Unreviewed

Lists *Progress Notes* that are tagged “Needs Review” in the QA users caseload. Used only by the QA group therefore not visible to all users.

New Unreviewed

Lists *Progress Notes* that are tagged “Needs Review” and have not been commented on by QA. Used only by the QA group therefore not visible to all users.

All Unreviewed

Lists *Progress Notes* that are tagged "Needs Review". Used only by the QA group therefore not visible to all users.

Pass

Provides a form for QA Administrators to set the QA Tag on Progress Notes by date range to "Pass".

User

Tme Card

Basic time entry and time card creation. See *Time Card*.

Caseload Billable Activity

Lists Progress Notes marked "Billable" with time totals of clients in your caseload.

Caseload Plans

Lists *Client Plans* you in your assigned caseload.

Client Plans

Lists *Client Plans* you own/created.

Team

Team List

Lists your group/team members, each user's caseload, and provides a *link* to each user's *Progress Notes*.

Group Billable Activity

Lists Progress Notes marked "Billable" with time totals of clients in your current group.

Client Plans

Lists *Client Plans* for the current/active group.

Reports

Print/PDF

Provides a form for creating a *PDF* documents suitable for printing. Fields used are dependent on the report.

CSV Export

Provides a form for creating a comma-separated values *CSV* file, which can be opened in any spreadsheet program. Fields used are dependent on the report.

Charts

Bar graphs showing Face-to-Face, Attempted Face-to-Face, and Telephone contacts.

See *Reports* for more information.

Billing

The billing menu is available to user who are members of the Accounting group.

List Billings

List billing history for the current group.

New Billing

Provides the form for new billing for the current group.

Admin

Admin menu is not available to all user groups.

Current Users

List users who currently have unexpired Prognotus sessions.

List Users

List users who have you listed as their supervisor. Lists all users if logged in as an administrator.

Add Client

Provides users, with appropriate permissions, a form to add new clients.

Admin Dashboard

Administration page for those in the admin group.

Service Types

Lists Prognotus Service Types. Groups with appropriate permissions may rename or add Service Types.

Add User

Visible to those in the Administrator group. Provides a form to add new users.

See *Administration* for more information.

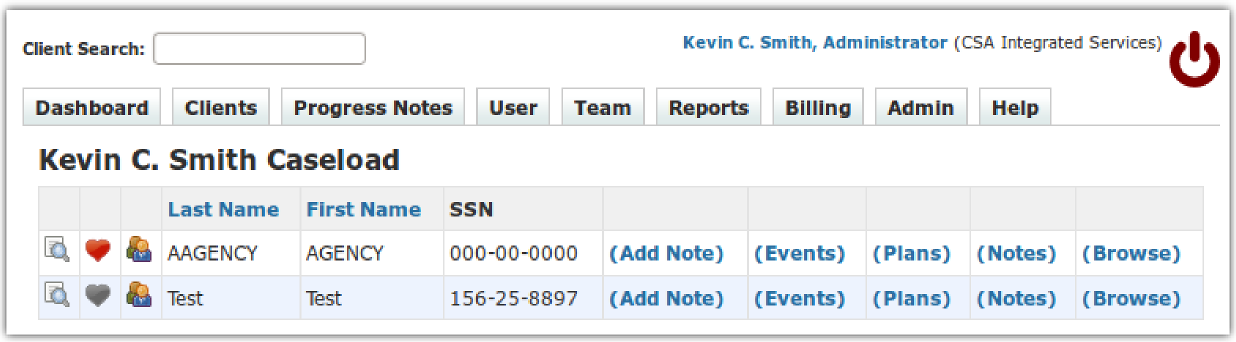
Using Prognotus

Clients

Clients are the central focus of Prognotus. Just about every process will involve a particular client; *Progress Notes*, *Events*, *Plans* and more are associated with a client. In most cases even a user is associated with a list of clients; the user's "caseload". Caseloads are managed by users in the "Supervisor" group.

Working with Clients

Clicking *Clients* on *The Menu* lists the clients that have been assigned to your caseload. Clicking "All Clients" will list all your current group's clients.



Each row contains: A *View Client* icon, "Favorite" icon, "Caseload" icon, Last Name, First Name, Social Security Number, *Plans*, *Add Note*, *Events*, *Notes*, and "(Browse)". Additionally, those in the Supervisor group may use the caseload icon to add or remove a client from a user's caseload. User may use the favorite icon to add or remove client from their list of favorites.

You can sort by "Last Name" or "First Name" by clicking the blue table column header.

A client search field will be displayed near the bottom of the page. You may search by first name, last name, or nickname. The search is *case* insensitive and partial names will work. A search includes all clients in your current group.

View Client

Click the *View icon* to look at a summary of the a Client's information. This page contains demographic information, a list of users assigned the client, and a list of groups the client is in. This page also displays various other icons including the *Edit icon* and a *World/Internet icon* among others.

Click the "Edit" icon to *edit the client*.

Edit Client

When updating client information ensure that the client is in at least one group before saving.

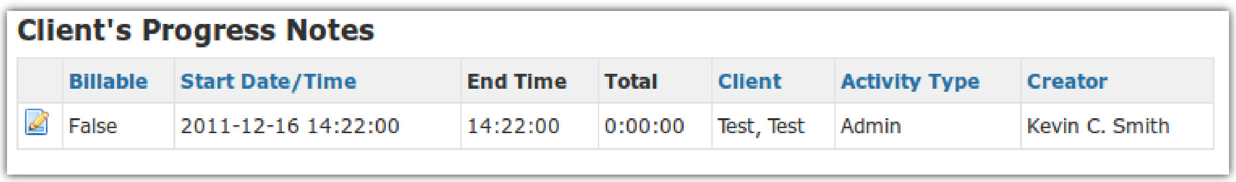
Warning: If an error occurs the form will be reset and all information, but the groups, will be restored. Remember to recheck the proper groups or click "Client", find the client, click "Edit" and start from the beginning; this will reload the groups.

Note: For some functions to work correctly; such as jail site checks, the first and last name fields must contain their legal names (name on their ID).

Progress Notes

Progress Notes are, as well as *Clients*, a primary focus of Prognotus. When viewing a list of Progress Notes the order and columns will vary by how you arrived at the listing.

Clicking "Notes" in a *Client list* displays a Client's notes from the most recent "Start Date".



Client's Progress Notes

	Billable	Start Date/Time	End Time	Total	Client	Activity Type	Creator
	False	2011-12-16 14:22:00	14:22:00	0:00:00	Test, Test	Admin	Kevin C. Smith

Click the *Edit* icon to change a Progress Note.

Note: A red shaded icon indicates "Incomplete" and green is "Billable". See *Quality Assurance* further information.

"Total Time" is calculated for each note ("End Time" - "Start Time").

Search Notes

"Search Notes" form with various search fields. You can search for notes other than your own as long as you belong to the same group assigned to the note.

Fields used: ID, Search By, Start Date, End Date, User, Client, Activity Type, Service Type, Note Contains, QA Tag, Status, Billable, Billing.

To search notes for key works use the "Note Contains" field.

- Do not use special characters.
- Use "!" to exclude a word.
- Use "&" to require another word. Any spaces will be converted to "&".
- Use "|" (means "or") to search for any of the words.

Some keyword search examples:

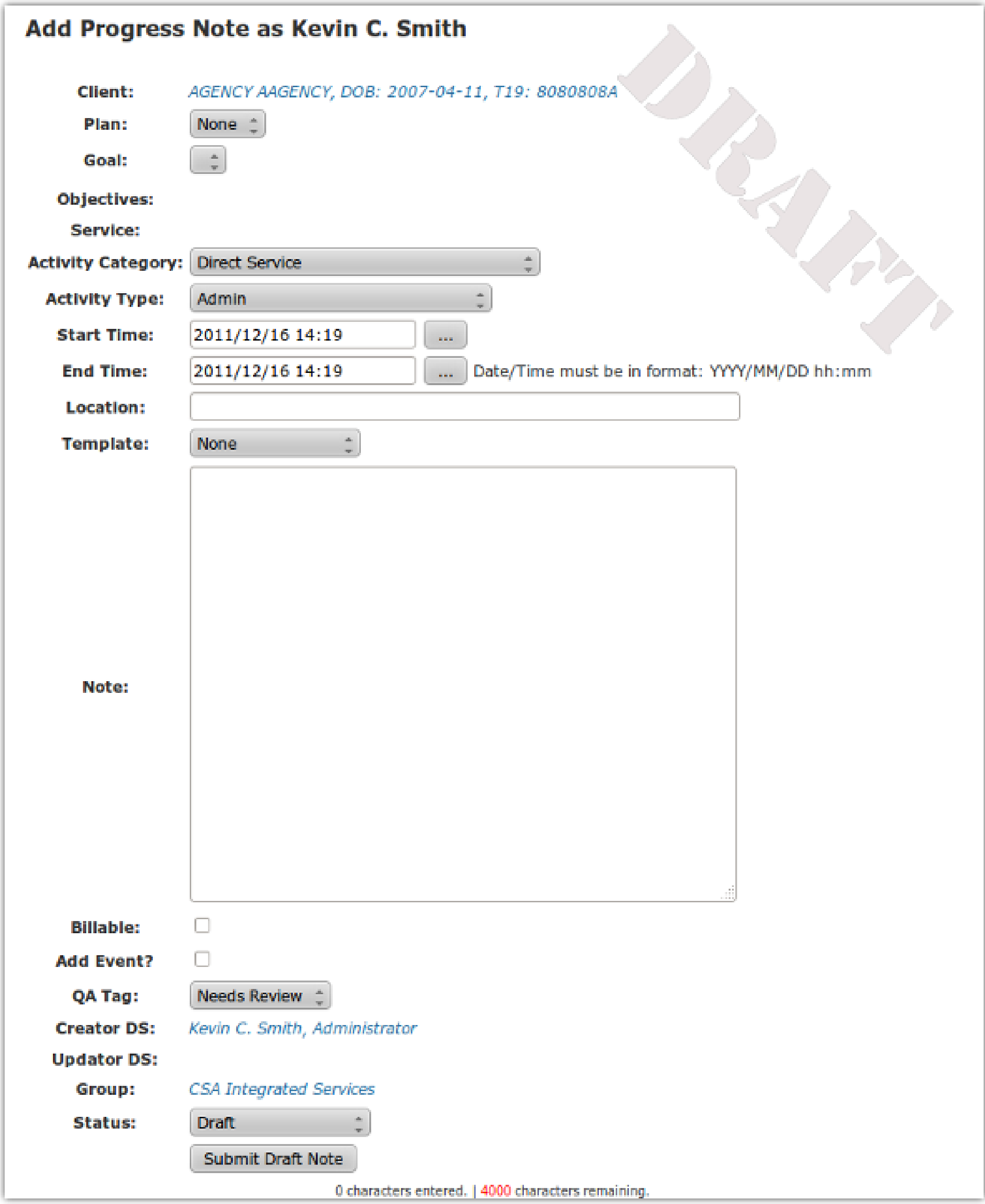
```
* home&medication (Will find notes with both words).
  * home medication (Will will return the same results).
* home&!medication (Will find notes that contain the word home and do note contain␣
↪the word medication).
* home|medication (Will finde notes containing either home or medication).
* home|medication&!office (Will find notes containing either home or medication, and␣
↪do not contain office).
```

The resulting list also adds the "End Time" column, and the total is calculated if the "Calculate Time" checkbox checked.

Note: To use search Client: Caseload you must select a User. Selecting User: "All" will cause the client search to equal Client: All.

Edit/Add Note

1. Clicking "Add Note" in a *Client list* will give you the Progress Note entry form.
2. If the note is to be linked with a client's objectives. Select a Plan, a Goal, and then check as many objectives as applies to your note.



- Click “View Goal” for an overview of the *Plan*.

3. Choose and “Activity Category”.

   - The default “Direct Service” should be fine for most Mainstream users.

4. Choose an “Activity Type”.

5. Enter the “Start Time” and “End Time”.

Note: To the right of “Start Time” and “End Time” is a button, which will assist with date and time entry. A particular format for these fields is required: YYYY/MM/DD hh:mm (2008/10/28 21:34).

> **Warning:** The Date & Time can not be over one year in the past or 12 hours in the future. You can only write a note that has the same start and end date unless it's for midnight. If note's time crosses midnight (Midnight is 00:00), write two notes splitting the time accordingly.

Overnight Shift Summary Example

- Write two notes
- Note 1: Start = 2010/10/08 23:00, End = 2010/10/09 00:00
- Note 2: Start = 2010/10/09 00:00, End = 2010/10/09 07:00

The only time dates can be different is if one is for midnight.

6. Enter the "Location" information.
7. Some groups have a Template option, which provides some helpful preformatted note structures. Some groups may also have a default template for new notes.
8. Write your "Note" in the Note field.

> **Note:** The "Note" field is limited to 4000 characters. A counter is displayed at the bottom of the page. If you should run out of space, save the note and continue in another note. You may want to divide the time accordingly between the two notes. Also, formatting in this field is irrelevant, printed documentation will combine all paragraphs to increase the number of notes per page.

9. Check Billable if the note is billable. The billable default is set by group. If you don't know just go with that default.
10. Set the "Status" of your note; the default status of a new note is Draft. There are three options (Completed/Signed, Draft, Delete).

- "Completed/Signed" means the Progress Note is in a finished state and your electronic signature is applied.
- "Draft" means the Progress Note is still being worked on and you plan to return to it later. A Progress Notes can be set to Draft only when creating a new note. One a note leaves Draft status it cannot be changed back. Progress Notes in a "Draft" state will not be listed for QA review and changes will not be tracked. Draft notes are considered unsigned.
- "Delete" means this Progress Note is not wanted, it's incorrect, etc. Progress Notes marked "Delete" will not show in any reports and most listings.

> **Note:** Progress Notes marked "Delete" are not immediately deleted, but will be purged from the database at a later date.

> **Note:** Progress Notes marked "Completed/Signed" or "Delete" cannot be changed to "Draft".

11. Click the submit button to finish.

> **Note:** After a *Quality Assurance* review a Progress Note cannot be changed in most groups.

> **Warning:** If your current session expired before you clicked "save", log back in immediately to complete the Progress Note save. Failing to do so may result in the loss of that note. Also see *FAQ*.

Progress Note Validation Errors

Most form fields are validated to ensure correct data is being received and stored in the database. A validation error will cause the Progress Note form to reload and display a red message about the error.

To proceed, correct the error indicated in red. Before saving the form again check to ensure all other fields are still correct. Most fields should not have changed, however check-boxes and some single select (drop-down) fields will in rare cases.

- Click the submit button when completed.

Linking Event(s)

A Progress Note may have *Events* associated/linked with it. Checking the "Add Event" check-box before submitting a note, then submitting the note, will save the note then load the events page.

See *Linking a Progress Note and Event(s)* under Events for instructions.

Note Comments

Comments are short notes regarding a Progress Note written by QA. Comments are only visible to QA, Supervisor, Admin or the note creator.

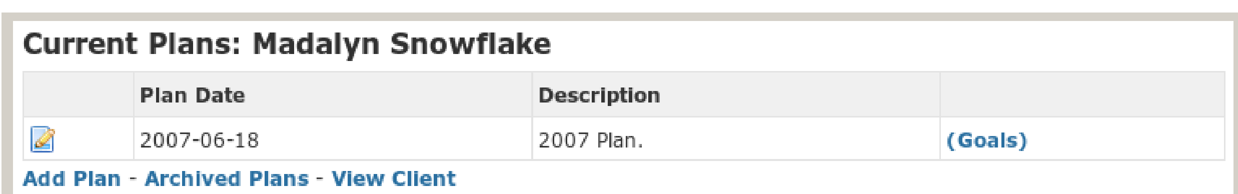
If a progress note does not have any comments the "Comment" section will not be visible; unless the user is in the QA, Supervisor or Admin groups.

The Progress Note creator can use the comment form to respond to QA comments, if needed.

- To view comments *click* "Comments".
- To close *click* "close comments".

Plans

List of plans for a *Client* with a brief description. "Archived" plans are not displayed by default.


Current Plans: Madalyn Snowflake

	Plan Date	Description	
	2007-06-18	2007 Plan.	(Goals)

Add Plan - Archived Plans - View Client

Click the  *Edit icon* to edit a plan.

> **Warning:** Changes effect all *Progress Notes* that have been associated with this plan's goals and objectives.

Click *Add Plan* to create a new plan for the client.

Click *Goals* to list the goals of this plan.

Edit/Add Plan

When creating the plan make the plan description short but descriptive (e.g. "2008 ISA IEP"), so it will be useful in a clients plans list. The same form is used for editing or adding a plan.

Fields displayed: Plan Date, Description, Locked, Archived.

Plans are editable by the plan creator or the creator's direct supervisor.

"Locked" sets important fields to "read only".

Goals

Lists the goals for a *Plan*, ordered by *weight*.

Madalyn Snowflake Plan: 2007 Plan.

	Weight	Goal	Domain		
	0	I want to move into a my own apartment.	Community Living	**(Objectives)**	

Add Goal - **Archived Goals** - **Plans**

Click the Edit icon to *modify a goal*.

> **Warning:** Changes effect all *Progress Notes* that have been associated with this goal and it's objectives. Changing a Goal's service type effects billing.

Clicking *Objectives* will give you a list of objectives associated with this goal.

You can add a new goal by clicking "Add Goal". Once again, keep the goal description short but descriptive. How you write a goal will be program dependent, however goals are usually only one sentence, clear, and measurable/observable.

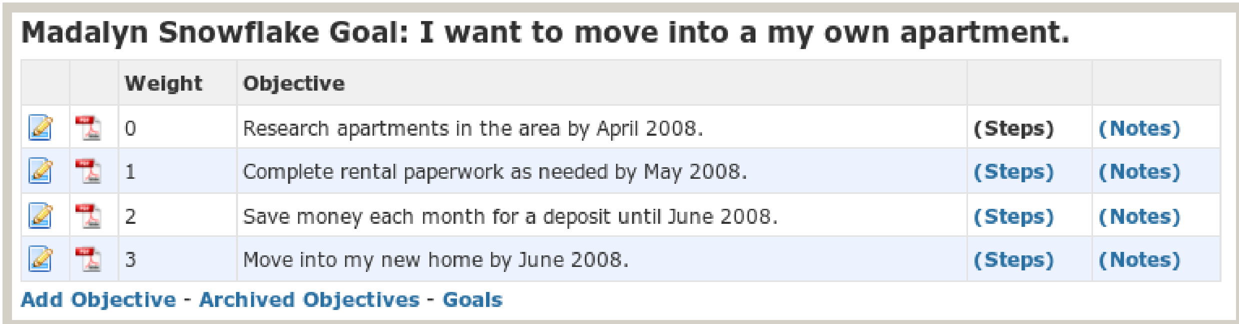
Edit/Add Goal

Displays a form for editing or adding a goal. Fields displayed: *Weight*, Domain, Goal, Background, Comments, Service Type, Locked, Archived.

"Locked" sets important fields to "read only".

Objectives

Lists the objectives for a *goal*, ordered by *weight*.



Madalyn Snowflake Goal: I want to move into a my own apartment.

		Weight	Objective		
		0	Research apartments in the area by April 2008.	(Steps)	(Notes)
		1	Complete rental paperwork as needed by May 2008.	(Steps)	(Notes)
		2	Save money each month for a deposit until June 2008.	(Steps)	(Notes)
		3	Move into my new home by June 2008.	(Steps)	(Notes)

Add Objective - Archived Objectives - Goals

Click the “Edit” icon to make changes to *edit an objective*.

> **Warning:** Changes effect all *Progress Notes* that have been associated with this objective and it’s steps.

Click the *PDF icon* to create a printable report of the objective and it’s steps.

Click *Steps* for a list of steps associated with an objective.

Click “Notes” for a list of Progress Notes that have been associated with an objective.

Edit/Add Objective

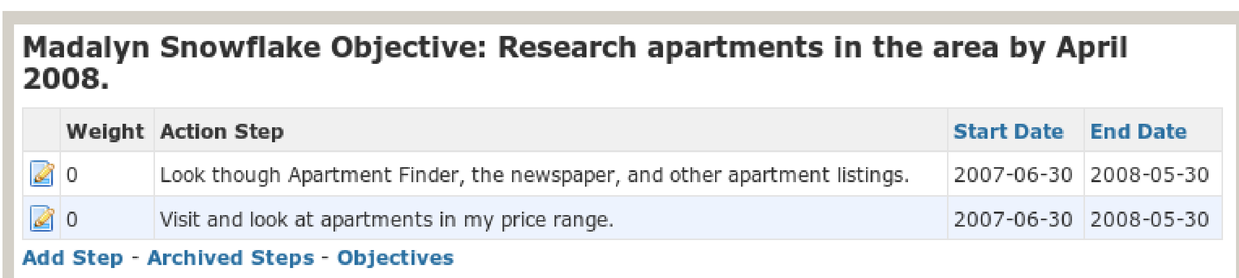
Displays a form for editing or adding an objective. Fields displayed: *Weight*, Objective, Locked, Archived.

Objectives, like goals, are should also be one sentence, clear, and measurable/observable.

“Locked” sets important fields to “read only”.

Steps

Lists the steps for a *objective*, ordered by *weight*.



Madalyn Snowflake Objective: Research apartments in the area by April 2008.

	Weight	Action Step	Start Date	End Date
	0	Look though Apartment Finder, the newspaper, and other apartment listings.	2007-06-30	2008-05-30
	0	Visit and look at apartments in my price range.	2007-06-30	2008-05-30

Add Step - Archived Steps - Objectives

Click the “Edit” icon to make changes to *a step*

Edit/Add Steps

Displays a form for editing or adding a step. Fields displayed: *Weight*, Step, Who’s Responsible?, Funding, Start Date, End Date, Locked, Archived.

Steps must have a description; usually only one sentence, as well as the start and end date.

“Locked” sets important fields to “read only”.

Transferring a Plan

You may need to transfer a plan you have written to another user, such as when transferring a client to another user.

1. Click “Edit” icon of a plan.
2. Click the “Creator” name link.
3. Select a user from the “Owner” field.
4. click “Change Owner”.

The plan along with it’s goals, objectives, and steps will be transferred to that user.

Events

Events record particular *Client* occurrences for agency reporting/tracking purposes. The use of this section is program dependent; not all programs do or will use this area. Ask your supervisor if you will be using Events.

The Events page is split into two area: The *Edit/Add Event* form and the *Events History* list.

Edit/Add Event

1. First locate the *Client* you wish to create an event for, if you haven’t already.
2. Click “Events” and complete the form under the heading **Adding New Events**.
3. Click “Save Event”.

The event will now appear in under the heading *Events History*. Repeat the process as many times as needed.

If you need to change an event simply click the *Edit icon*.

Note: A message now appears *“You are editing an Event”* in a yellow *alert* box.

Correct your event and click “Save Event”. The event in the *Events History* should now reflect the changes.

Duplicate Events

Duplicate events are allowed. However, you can and should *link* your Progess Notes to events other users have created if it’s the same event.

> **Warning:** Check a client’s events before adding one that could be an unnecessary duplicate such as, Jail, Hospital, Job changes, etc.

Events History

The “Events History” lists all events for the client starting with the most recent. It provides an *Edit icon*, Event Group, Event Type, Date Created, Creator, and the number of *Progress Notes* associated with an event.

An Event can have any number of linked/associated Progress Notes.

Note: Events added by group “Prognotus System” were automatically added.

Delete Event

When *editing an event* you have the option of deleting an event. Once this is done it can not be restored. Click the “Delete Event” link at the lower right of the edit area, and your event will be deleted.

Linking a Progress Note and Event(s)

A *Progress Note* can be linked (associated) with an *Event*. The number of unlinked Events that you created will appear on your *Dashboard*.

Events History

(Progress Notes)

	Date	Group	Type	Created	Creator	# Notes	
	2008-10-29	Face-to-Face	Client Home	2008-10-29 12:31:36	Kevin C. Smith	0	

1. Find the *Progress Notes* you will wish to link to an Event.
   - From *Events* click “Progress Notes” to get a list of notes written for the current Client.
   - Or, click “Progress Notes” from the *Client List*.
   - Or, click *Progress Notes* on the *The Menu*.
2. Click the *Edit* icon.
3. At the bottom of the Progress Note form will be a list of Events linked to this note.
4. Click “Attach an Event”.

5. The *Events* page will be displayed with an additional *Add icon* displayed in the *Events History*.
6. Locate the correct event in the *Events History*.
   - If the Event is not created yet, use the Event form at the top to create and add it to the current list.
7. Click the "Add" icon by the Event you wish to link to the note.
8. The Event is now linked to the Progress Note.

Reports

There are primarily two types of reports *PDF* and *CSV*.

Print/PDF

Creating a report in "Print/PDF" sends a *PDF* document to your browser which can be downloaded and/or printed.

Note: Not all fields are used by every report.

Reports and Fields Used

Progress Note Service Type, Start & End Date, Order, User, Client (Leave User field unselected to get report by client without User sorting)

Case Load User

Time Spent by Activity Type Start & End Date, Disability

Time Spent by User Start & End Date, User

CSV Export

Creating a report under "CSV Export" sends a *CSV* file to your browser, which can then be downloaded and/or viewed with any spreadsheet application.

Reports and Fields Used

Some reports will limit the number of days that can be run at one time.

Activity Report Access Level: Unlimited User

Handles Overlapping Time: No

Fields Used: Start Date, End Date

Columns: ("Date", "Week", "Start Time", "End Time", "Time", "Activity", "Last Name", "First Name", "Client ID", "Note ID", "Billing Code", "QA Tag", "Creator", "Creator ID", "Rate Code", "Billable")

Description: Returns all Progress Note activity for a period of time.

Billable Report Access Level: Unlimited User

Handles Overlapping Time: No

Fields Used: Start Date, End Date

Columns: (“Date”, “Week”, “Start Time”, “End Time”, “Time”, “Activity”, “Last Name”, “First Name”, “Client ID”, “Note ID”, “Billing Code”, “Creator”, “Creator ID”, “Rate Code”)

Description: Returns Progress Notes marked “Billable”.

Billable Service Units Access Level: Unlimited User

Handles Overlapping Time: Yes

Fields Used: Service Type, Sum By, Start Date, End Date, Clients

Columns: (“Month/Date”, “Client ID”, “Client Code”, “Last Name”, “First Name”, “Service Code”, “Service Funder”, “Client Funder”, “Billable Time”, “Units”)

Description: Returns billable time per client and units summed by day or month. Any overlapping time is accounted for in time and units. During the transition to the MCOs, there will be two funder columns. Service Funder is the funder associated with the service type. Client funder is associated with the Client, which should be an MCO.

Billing Client Report Access Level: Accounting

Handles Overlapping Time: No

Fields Used: Billing, Service Type, Start Date, End Date, Clients

Columns: (“Client ID”, “Client Code”, “Last Name”, “First Name”, “Total Time”, “Units”, “Client Memo”, “Date Billed”, “Start Date”, “End Date”, “Service Type”, “Service Code”, “Memo”)

Description: Returns billings by Client for a given period of time. Billings are Progress Notes that have been marked “billed”.

Billings Report Access Level: Accounting

Handles Overlapping Time: No

Fields Used: Service Type, Start Date, End Date

Columns: (“Date Billed”, “Start Date”, “End Date”, “Service Type”, “Service Code”, “Units”, “Total Time”, “Memo”)

Description: Returns billings for a given period of time. Billings are Progress Notes that have been marked “billed”.

Client Report Access Level: QA Access

Fields Used: None

Columns: (“LastName”, “FirstName”, “MiddleName”, “SSN”, “DOB”, “Diagnosis”, “Medicaid”, “Insurance”, “Insurance Number”, “Address1”, “Address2”, “ZipCode”, “Group”, “RateCode”, “ClientCode”)

Description: Returns unarchived client information for the current group.

CSA PCHS Export Access Level: Unlimited User

Handles Overlapping Time: No

Fields Used: Start Date, End Date

Columns: (“SID”, “Contact Date”, “Start Time”, “End Time”, “Duration”, “Service Type”, “Contact Type”, “Activity Type”, “Provider ID”, “User ID”, “Date Entered”, “Location”)

Description: Returns contacts formated for import by PCHS MIS system. BI clients are not included in this report.

CSA PCHS Extended Access Level: Unlimited User

Handles Overlapping Time: No

Fields Used: Start Date, End Date

Columns: ("SID", "Last Name", "First Name", "Contact Date", "Start Time", "End Time", "Duration", "Service Type", "Description", "Contact Type", "Description", "Activity Type", "Description", "Provider ID", "User ID", "Display Name", "Date Entered", "Location", "Service Location", "PNote ID", "QA TAG", "Billable")

Description: Returns contacts based on the CSA PCHS Export, but formated for readability and a few extra fields. BI clients are not included in this report.

Client Address Book Access Level: Unlimited User

Handles Overlapping Time: N/A

Fields Used:

Columns: ("First Name", "Last Name", "Display Name", "Nickname", "Primary Email", "Secondary Email", "Work Phone", "Home Phone", "Fax Number", "Pager Number", "Mobile Number", "Home Address", "Home Address 2", "Home City", "Home State", "Home ZipCode", "Home Country", "Work Address", "Work Address 2", "Work City", "Work State", "Work ZipCode", "Work Country", "Job Title", "Department", "Organization", "Web Page 1", "Web Page 2", "Birth Year", "Birth Month", "Birth Day", "Custom 1", "Custom 2", "Custom 3", "Custom 4", "Notes")

Description: Returns a list of clients formated for import into a address book, such as Mozilla Thunderbird.

Client Addresses Access Level: Unlimited User

Handles Overlapping Time: N/A

Fields Used: None

Columns: ("First Name", "Last Name", "Address 1", "Address 2", "City", "State", "Zip")

Description: Returns a list of client and addresses which can be used to make mailing labels.

Clients by Funder Access Level: Unlimited User

Handles Overlapping Time: N/A

Fields Used: None

Columns: ("Client_ID", "Last Name", "First Name", "Funder")

Description: Returns the current group's clients and their associated funder/payer.

Contact Report Access Level: Unlimited User

Handles Overlapping Time: No

Fields Used: Start Date, End Date

Columns: ("Client ID", "Last Name", "First Name", "Disability", "Face-to-Face", "Telephone", "Collateral", "Total")

Description: Returns Progress Note contacts (Face-to-Face, Telephone, etc). Primarily used for contact analysis.

Contact Report (CSA CM Billable) Access Level: Unlimited User

Handles Overlapping Time: No

Fields Used: Start Date, End Date

Columns: (“Client ID”, “Last Name”, “First Name”, “Disability”, “Face-to-Face”, “Telephone”, “Collateral”, “Total”, “Billable Units”)

Description: Returns Progress Note contacts (Face-to-Face, Telephone, etc). Primarily used for CSA Case Management contact analysis. Units are Case Management units and based on contacts over two minutes.

Creator Daily Productivity Report Access Level: Unlimited User

Handles Overlapping Time: Yes

Fields Used: Start Date, End Date, Users

Columns: (“Start Time”, “End Time”, “Group”, “Creator”, “Total”)

Description: Returns note creator(s) billable hours totaled daily. Only counts overlapping time once.

Creator Productivity Report Access Level: Unlimited User

Handles Overlapping Time: No

Fields Used: Start Date, End Date

Columns: (“Creator_ID”, “Employee”, “Month”, “Num_Notes”, “Total_Time”, “Avg_Contact_Hrs”)

Description: Returns note creator billable hours for the current group. Counts overlapping time totaled monthly.

GP Billing (IHH) Access Level: Unlimited Users

Handles Overlapping Time: Notes

Fields: Start Date, End Date

Columns: (“InvoiceID”, “InvoiceDate”, “Billing”, “Providing”, “SSN’, “Lname”, “Fname”, “Service”, “BeginDate”, “EndDate”, “Chg”, “Units”, “Fees”, “Credits”, “Amt”, “Notes”, “Deny”, “Customer #”, “Program #”, “Account String”)

Description: Returns billable contact for CSA IHH. Columns are formated for importing into the CSA accounting system and PCHS billing.

Late Entry Access Level: Unlimited User

Handles Overlapping Time: N/A

Fields Used: Start Date, End Date, Days

Columns: (“Pnote ID”, “Start Time”, “End Time”, “Created”, “Signature”)

Description: Returns Progress Notes that were created over a specfied number of days after the contact date. Enter a number in the Days field to specify what is late. If none is provide the default is 3.

Events (All) Access Level: Unlimited User

Handles Overlapping Time: N/A

Fields Used: Start Date, End Date

Columns: (“Event Date”, “Last Name”, “First Name”, “SSN”, “Event Group”, “Event Type”, “Group”)

Description: Returns Client events for the defined period of time.

Events (Linked to notes) Access Level: Unlimited User

Fields Used: Start Date, End Date

Columns: (“Event Date”, “Last Name”, “First Name”, “SSN”, “Event Group”, “Event Type”, “Creator”, “Note ID”, “Group”, “Event ID”)

Description: Returns Client events for the defined period of time, which have been linked to a Progress Note.

Incompletes Report Access Level: Quality Assurance

Handles Overlapping Time: N/A

Fields Used: Start Date, End Date

Columns: ("Group", "Incompletes", "Current Notes", "Total History")

Description: Returns the sum of the Progress Note status for a Group; used for QA analysis.

Medicaid Billable Report Access Level: Quality Assurance

Handles Overlapping Time: No

Fields Used: Start Date, End Date

Columns: ("Date", "Week", "Start Time", "End Time", "Time", "Activity", "Last Name", "First Name", "Client ID", "Billing Code", "Note ID", "Creator", "Creator ID", "Rate Code")

Description: Returns Progress Notes with a QA tag of "Billable" and which are linked to an Objective. This as be superseded by the various billable reports.

Notes Overlaps Creation Access Level: Quality Assurance

Fields: Start Date, End Date

Columns: ("Created Timestamp","Start Time", "End Time", "Total", "Note ID", "Note Creator", "Group")

Description: Returns notes created between the stard and end time of the note.

PCHS-GP Billable Units Access Level: Unlimited User

Handles Overlapping Time: Yes

Fields Used: Service Type, Sum By, Start Date, End Date, Clients

Columns: ("InvoiceID", "InvoiceDate", "Billing", "Providing", "SSN", "Lname", "Fname", "Service", "BeginDate", "EndDate", "Chg", "Units", "Fees", "Credits", "Amt", "Notes", "Deny", "Customer #", "Program #", "Account String", "Billable Time")

Description: Returns billable time per client and units summed by day or month. Any overlapping time is accounted for in time and units. Columns are formated for importing into the CSA accounting system and PCHS billing.

User Report Access Level: Supervisor

Handles Overlapping Time: N/A

Fields Used: None

Columns: ("User Name", "Title", "Employee ID", "Error Rate", "Review %", "Last Login", "Supervisor", "Group Name", "User Created")

Description: Returns a group's user information.

User History Access Level: QA

Handles Overlapping Time: N/A

Fields Used: Start Date, End Date, Users

Columns: ("User", "Action", "Created")

Description: Returns user login history.

Time Card

Prognotus offers basic time entry and Mainstream time card creator. This replaces the original Mainstream online time card creator.

Simple Time Entry

1. Enter the date and time in.
2. Enter the date and time out. Keep the date the same as the IN date unless you need to end on midnight (following day 00:00).
3. Choose the type of entry (Base, Sleep, Premium, Temporary, Holiday, Vacation or Sick)
4. Optionally, choose a Client. Choosing a client is used to code the time. If more than one, any client in the a home should produce the correct code.
5. Optionally, add a comments. Comments are added in the Client section of the card along with the code.
6. Click Submit.

Note: The comment section allows longer text than can be added to a time card. Only the first 20 characters will be added to time cards.

Note: If the code is wrong, it can be changed by editing the entry. Notify QA, so they fix the code associated with that Client.

Time Card Creator

Prognotus can create a PDF time card formatted for printing on Mainstream's cards. Use a blank card or the back of a time card. Most likely the PDF can simply be e-mailed to the proper person; ask your supervisor.

1. From the Time Card page, click (Create Time Card).
2. Choose the start date for the time period.
3. Choose the end date; the same was the Week Ending date for the reporting period.
4. Click Submit.
5. A PDF will be produced with you electronic signature.

- The PDF file is not kept in Prognotus. Save it for your records.
- E-mail a copy to the proper person.

CHAPTER

THREE

PROGNOTUS ADVANCED USE

Prognotus Groups

Prognotus has several built in "system" groups providing various levels of access rights, as well as various company "program" groups.

Agency Roles & Prognotus System Group Assignments

Agency Role	Suggested Prognotus System Group(s)
Billing Technician	Quality Assurance
CSA Case Manager	Case Manager
Director	Supervisor, Manager
General Users	NONE (*Most users have no system group.*)
Integrated Services Coordinator	Case Manager
Team Leader (MSL)	Supervisor
Team Leader (CSA)	Supervisor, Manager
QA Assistant	Manager, Quality Assurance
QA Technician	Manager
Outside Agencies (Reviewers, etc)	Guest (**Guest only, No other system group!**)

The following lists the "system" groups in descending level of access.

Prognotus Administrator

The Administrator system group has full access and therefore should contain a limited number of users.

- The "Username" and "Email Address" user fields can only be modified by an Administrator.
- Only Administrators can add other users.
- Administrators can also delete Progress Notes.

Note: It may be necessary to contact an Administrator to add an existing Client to a another program group.

Prognotus Manager

This group has similar access as the Administrator group, however that access is limited to their program group(s).

- Managers can create and update client *Plans*.

- Managers can add and update new clients.
- Managers can manage Client caseloads of users.

Prognotus Supervisor

The Supervisor system group contains users that supervise or manage other users.

- Supervisors can change group memberships of other users, but only to groups that they are also members of.
- Supervisors can edit *Plans* created by users assigned to them; if they themselves can have plan creation permissions.
- Supervisors manage the Client caseloads of users.

Prognotus Quality Assurance

The QA group is able to assess and change Quality Assurance related fields.

- QA users can modify *Progress Notes* of other users (limited to QA fields).
- QA users are able to attach comments to Progress Notes.
- QA users can modify **all** user's *Plans* if also in the Manager or Case Manager group.
- QA users who are also in the Supervisor group can access the Progress Note Pass form.

Prognotus Quality Assurance Admin

The QA Admin group adds addional rights that should be limited to a small number of users.

- QA Admin can set a list of notes to pass in bulk. This will bypass note review.
- QA Admin can move anyones note out of Draft status.
- QA Admin can change a notes billable field even after it has been billed. Use with caution.
- QA Admin can change a user's "Review Percentage" and "Auto Review".
- QA Admin can limit a user's access only to their definced caseload.

Prognotus Case Manager

The system group Case Manger contains "Standard" users who are also responsible for creating and managing Client *Plans*.

Prognotus Standard User

This system group does not in actuality exist. Any user not assigned to a system group is a "Standard" user.

Note: Standard users need to be assigned to at least one "program" group.

Prognotus Guest

The Guest system group contains users who require only limited access to Prognotus. Users in this group do not have the rights to create or modify Client information or documentation. They are able to view Client information, run reports, and have all other standard user rights. This group will have no client information access unless assigned to at least one *Program Group*.

> **Warning:** To be safe Guests should not be assigned to any other above system group.

Program Groups

All other groups are "Program" groups, which organize *Clients* and Users into their respective teams. These groups also provide or limit access to Client information based on group membership(s).

Administration

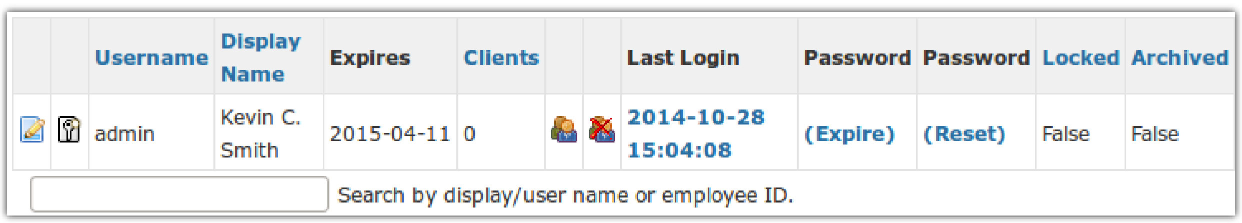
The "Admin" features are available only to users in the admin and supervisor groups.

Current Users

Lists users who currently have unexpired Prognotus sessions. A session expires after 20 minutes of inactivity.

Working with Users

List users who have you listed as their supervisor. Lists all users if logged in as an administrator.



		Username	Display Name	Expires	Clients			Last Login	Password	Password	Locked	Archived
		admin	Kevin C. Smith	2015-04-11	0			2014-10-28 15:04:08	(Expire)	(Reset)	False	False

Search by display/user name or employee ID.

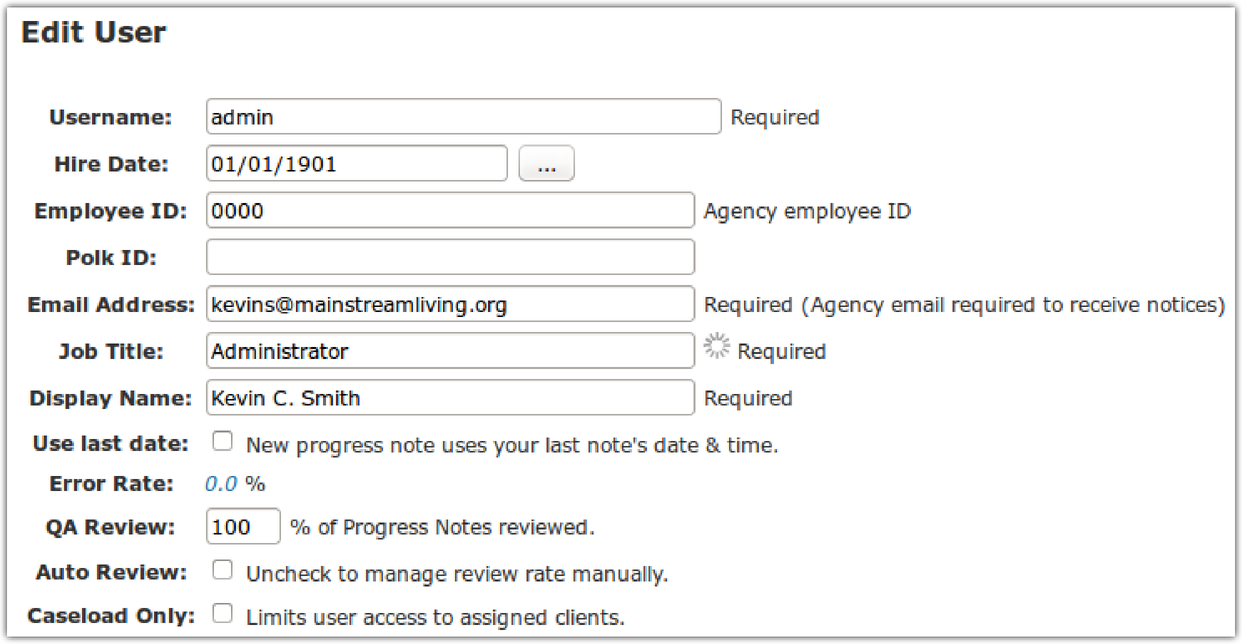
- Click the *Edit icon* to *edit a user's profile*.
- Click the to view temporary password information.
- Click the *People icon* to list a *user's caseload*.
- Click the *Delete Caseload icon* to *clear a user's caseload*.
- "Last Login" lists a user's logins and other information.
- Click "Expire" to require the user change their password on next login.
- Click "Reset" to reset the user's password. A temporary password will be created.
- If an account is "Locked", logins have been disabled for the user.

- If the account is "Archived", logins have been disabled and the user will no longer appear in various lists.

Note: The user's history is only a simple list of logins and account changes. A more accurate report can be run by the *database* administrator if needed.

List Users

Click the  "Edit" icon and use the form to modify a user's profile.

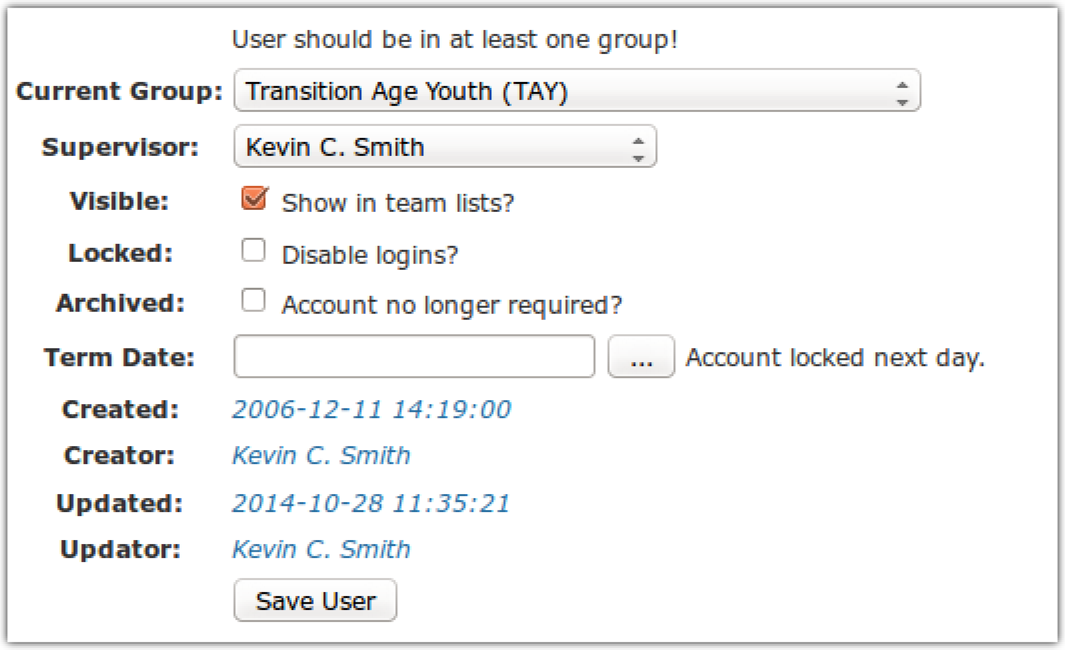


The fields available are dependent on your level of access. The above image shows all available fields in the top half of the form.

- Change the "User Title" and "Display Name" as needed.

Warning: These fields are used in the reports and should be the user's legal name and real job title.

- Checking "Use last date" checkbox will set the start date in a new Progress Note to the last created note's date; if available.
- "Auto Review" is checked by default. It can be unchecked by QA, however in most cases it's best to leave it checked.
- "Caseload Only", if checked, will limit the user's access to their defined caseload.



- Check "Visible" for a user to show in form user lists, and team lists.

Note: Some users, such as those in the group "Guests" and "Administrator" should not be visible. Generally, user's that don't write notes do not need to be visible.

- Check "Locked" to disable a user's login ability.
- Check "Archived" if the user's account is not longer required. They will not longer appear in report form user lists, will not be able to login, and all their caseloads will be cleared.
- If "Term Date" is set, the automatically the account will be locked the following day.

Current Group

The "Current Group" is the user's active group. Lists of clients, team members, etc only show for the user's current group.

To change the current group, use the provided select field. You are only able to change the current group to one the user is a member of.

Managing Caseloads

Click the *Delete Caseload icon* to clear a user's caseload.

Note: Only clears clients who are in the same group as you are currently in.

To view a user's caseload click the *People icon*.

Clicking *Remove icon* will remove a client from the caselaod.

To Add a Client to a Caseload

1. Click the "People" icon.
2. Use "Client Search" to find the client.
3. Click the *Add icon* by the desired client.

Add Client

Provides users, with appropriate permissions, a form to add new clients.

Note: For some functions to work correctly; such as jail site checks, the first and last name fields must contain their legal names (name on their ID).

Warning: A real social security number is required. Do not make one up. If unable to create a new client because the social security number is already in use. The client already exists in another group. Contact an Administrator to have the client added to another group.

Administrator Only Functions

Service Types

Lists Prognotus Service Types. Administrators may rename or add Service Types.

Warning: Changes effect billing, users and groups, therefore use with caution when renaming.

Add Users

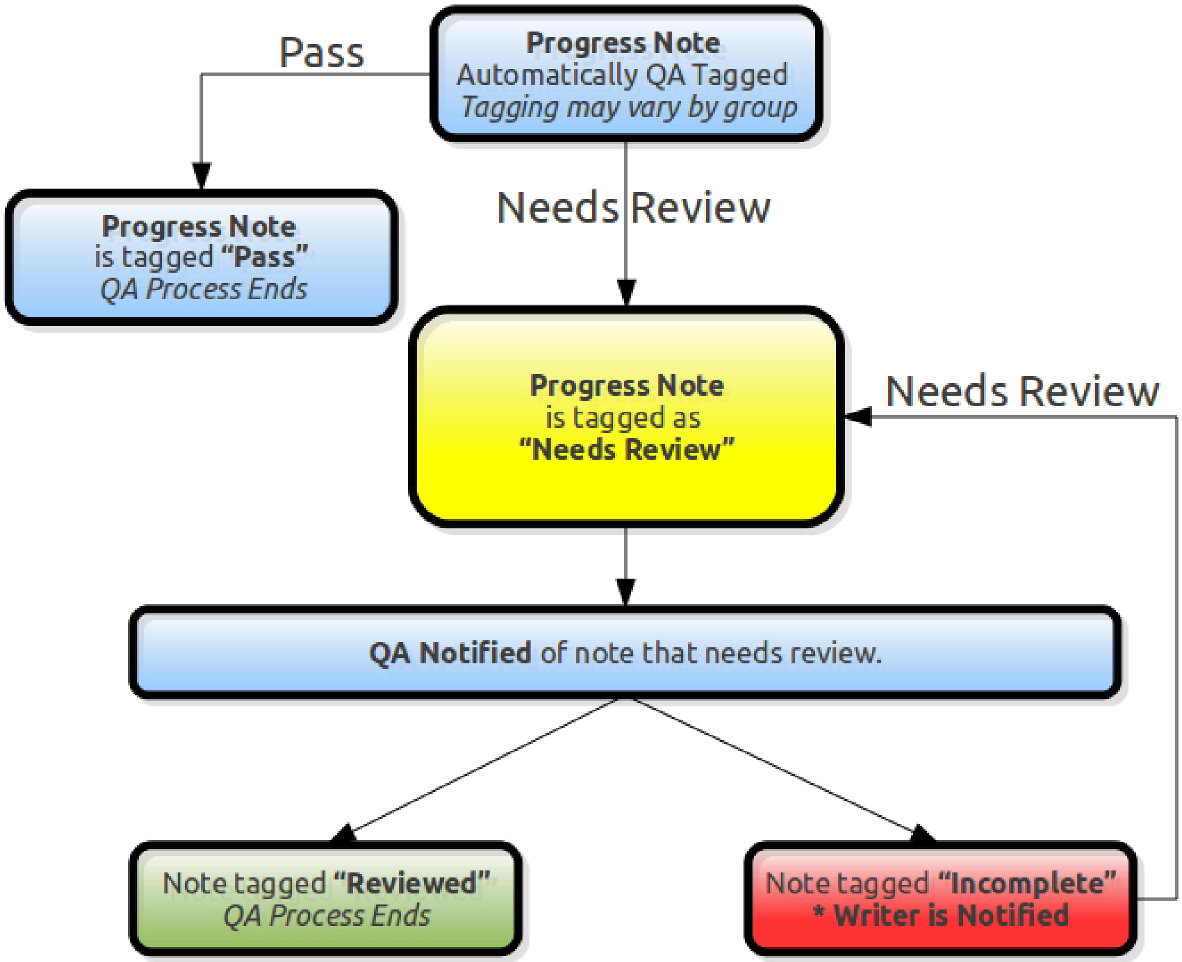
Provides those in the Administrator group with a form to add new users.

- An active email address is required for each user.
- A user needs to be in at least one group.
- Most Users should be have "Visible" checked.

Quality Assurance

The QA Process helps *Progress Notes* meet a group's reporting requirements.

Quality Assurance Workflow



1. New Progress Notes are marked "Needs Review" or "Pass" (varies by group and user).
2. Progress Notes needing review are added to the Dashboard of the group's QA user.
3. The QA user reviews the Progress Note and marks it "Reviewed", "Incomplete", or "Pass".
4. Progress Notes marked "Incomplete" are counted on the note creator's Dashboard.
5. Note creator makes changes; Progress Note is marked "Needs Review".

Note: All changes/updates to a Progress Note in the QA process will result it's status returning to "Needs Review", unless the user is in the QA group.

Note: Progress Notes marked "Reviewed" cannot be changed until QA resets the note to "Needs Review" or "Incomplete". If the QA user is the note creator, another QA person must reset the note.

Permissions & User Access

Access and rights to create, view, update, or delete Prognotus records are given based on a user's group and/or permissions. Groups have permissions, and users are assigned to one or more groups based on their *role(s)*.

Groups & Permissions

Permission	Prognotus System Group(s)
create	Administrator, Manager, Supervisor, QA
create_case	Administrator, Case Manager, Manager
create_client	Administrator, Manager
update_client	Administrator, Manager
qa_access	Quality Assurance
manage_pnote	Quality Assurance

Step Access

Action	Permission(s)	System Group(s)
Add Steps to other's Plans	qa_access	Supervisor (of Creator)

Activity Type Access

Action	Permission(s)	System Group(s)
Add/Update Activity Types		Administrator

Client Access

Action	Permission(s)	System Group(s)
Add new Client	create_client	
Modify Client medicaid No.	update_client (any at first entry)	
Modify Client groups	update_client	
Modify Client SSN	update_client	
Modify Client billing agency	update_client	
Modify Client MSL #	update_client	
Modify Client rate code	update_client	
Archive Client	update_client	

Event Access

Action	Permission(s)	System Group(s)
Modify other's Event		Administrator, Supervisor (of Creator)
Link an Event to other's Note		Administrator, Supervisor
Delete other's Event		Administrator, Supervisor (of Creator)

Goal Access

Action	Permission(s)	System Group(s)
Add Goals to other's Plans	qa_access	Supervisor (of Creator)
Modify other's Goals	qa_access	Supervisor (of Creator)

Objective Access

Action	Permission(s)	System Group(s)
Add Objectives to other's Plan	qa_access	Supervisor (of Creator)
Modify other's Objectives	qa_access	Supervisor (of Creator)

Plan Access

Action	Permission(s)	System Group(s)
Add Plans	create_case	Administrator, Case Manager, Manager
Modify other's Plans	qa_access	Supervisor (of Creator)
Modify Plan owner		Administrator, Supervisor (of Creator)

Progress Notes Access

Action	Permission(s)	System Group(s)
Add Comment to a Note	qa_access	
Modify a other's Note	qa_access (limited to tag)	
Delete a Note		Administrator, Creator

Service Type Access

Action	Permission(s)	System Group(s)
Add/Update Service Types		Administrator

Users Access

Action	Permission(s)	System Group(s)
Add Users		Administrator
Modify User (limited)	create	
Modify User (all)		Administrator
Reset user password		Administrator
Clear User caseload	create (same group)	
Add to User caseload	create (same group)	

CHAPTER

FOUR

APPENDIX

FAQ

Some answers to some frequently asked questions about Prognotus.

I lost my progress note. Can I get it back?

Maybe, first check in your *Progress Notes* and see you didn't choose the wrong client or date by mistake. Also see the next FAQ.

I clicked save after working on a note and it took me back to the login screen, did I lose my progress note?

Your session expired. Sign back in. Sessions expire after 20 minutes of no activity; typing is not seen by the server. Activity is registered when you click on links or buttons in Prognotus. The note should not be lost if you sign in when prompted; don't wait until later to sign back in.

I created a note for the wrong client. Can I change it?

Go to "My Progress Notes" click the "Edit" icon. Select all the text (Ctrl + A) in the note field and copy it (Ctrl + C) or right click and choose "Copy". Mark the note for deletion by setting "status" to "Delete". Then start a new note for the correct client and paste the text into the note field (Ctrl + V) or right click choose "Paste".

How do I find a progress note's ID?

Go to *Progress Notes* find the note, click the "Edit" icon. The progress note id will be the number at the end of the *URL* in the *browser location bar*. It's also part of the title when viewing or editing a note.

Can I delete a progress note?

You can mark if for deletion by setting the "status" to "Delete". The note will be deleted 60 days later.

How do I clear the browser's cache?

It's different for each browser and can change between versions. Look in the browser settings under privacy or security. Try searching online for the answer. Contact IT support if needed.

Why don't I have access to certain clients?

You have to be in the same group as the client to see them.

Also you may have access to more than one group and are currently in the wrong group. Look at the top of the page, by your name the active/current group is displayed. To change the active/current group click you name, select a different group, and then save.

Read the *Overview* section.

Glossary of Terms

Bookmark Bookmarks are Web page locations (*URLs*) that are easily stored and retrieved. As a feature of all modern *Internet web browsers*, their primary purpose is to easily catalog and access *web pages* that a user has visited or will visit, by name rather than by address (URL).

Saved links are called Favorites in Internet Explorer. By virtue of the browser's large market share, the term Favorite has become virtually synonymous with Bookmark.

Case In orthography and typography, letter case (or just case) is the distinction between majuscule (capital or upper-case) and minuscule (lower-case) letters.

Click Also called *Left Click*. Press down once on the left *mouse* button.

Computer A computer is a machine that manipulates data according to a list of instructions.

Computer Network A computer network is a group of interconnected *computers*. Networks may be classified according to a wide variety of characteristics.

Cookie *HTTP* cookies, or more commonly referred to as *Web* cookies, tracking cookies or just cookies, are parcels of text sent by a server to a Web client (usually a *browser*) and then sent back unchanged by the client each time it accesses that server. *HTTP* cookies are used for authenticating, session tracking (state maintenance), and maintaining specific information about users, such as *site* preferences or the contents of their electronic shopping carts. The term "cookie" is derived from "magic cookie," a well-known concept in UNIX computing which inspired both the idea and the name of HTTP cookies.

CSV The comma-separated values (also known as a comma-separated list or Comma-Separated Variable) file format is a file type that stores tabular data. The format dates back to the early days of business computing. For this reason, CSV files are common on all *computer* platforms.

Cursor An indicator used to show the position on a *computer* monitor or other display device that will respond to input. Usually indicated by an arrow.

Double-click A double-click is the act of pressing a computer *mouse* button twice quickly without moving the mouse. Double-clicking allows two different actions to be associated with the same mouse button. Often, *single-clicking* selects (or highlights) an object, while a double-click executes that object, but this is not universal.

Download To download is to receive data from a remote or central system, such as a webserver, FTP server, mail server, or other similar systems. A download is any file that is offered for downloading or that has been downloaded.

Encryption Encryption is the process of transforming information (referred to as plaintext) to make it unreadable to anyone except those possessing special knowledge, usually referred to as a key. The result of the process is encrypted information (in cryptography, referred to as ciphertext). In many contexts, the word encryption also implicitly refers to the reverse process, decryption (e.g. "software for encryption" can typically also perform decryption), to make the encrypted information readable again (i.e. to make it unencrypted).

Error Message A message displayed to inform you that something is wrong, and possibly how to correct it.

File Sharing File sharing refers to the providing and receiving of digital files over a *network*, usually following the *peer-to-peer* (P2P) model, where the files are stored on and served by personal *computers* of the users. Most people who engage in file sharing on the *Internet* both provide (upload) files and receive files (download).

Firewall A hardware or software device which is configured to permit, deny or proxy data through a *computer network* which has different levels of trust.

Graphical User Interface A graphical user interface (GUI) is a type of user interface which allows people to interact with electronic devices like computers, hand-held devices (MP3 Players, Portable Media Players, Gaming devices), household appliances and office equipment. A GUI offers graphical *icons*, and visual indicators as opposed to text-based interfaces, typed command labels or text navigation to fully represent the information and actions available to a user.

HTML HyperText Markup Language, It provides a means to describe the structure of text-based information in a document.

HTTP The Hypertext Transfer Protocol is a record of transmission of *WWW* documents between WWW servers (hosts) and *browsers* (clients).

Icon A *computer* icon is a small pictogram. Icons may represent a file, folder, application or device on a computer *operating system*. In modern usage today, the icon can represent anything that the users want it to: any macro command or process, mood-signaling, or any other indicator. User friendliness also demands error-free operation, where the icons are distinct from each other, self explanatory, and easily visible under all possible user setups.

Internet The Internet is a global system of interconnected *computer networks* that interchange data by packet switching using the standardized Internet Protocol Suite (TCP/IP)

Keylogger A diagnostic tool used in software development that captures the user's keystrokes. It can be useful to determine sources of error in computer systems and is sometimes used to measure employee productivity on certain clerical tasks. Such systems are also highly useful for law enforcement and espionage—for instance, providing a means to obtain passwords or encryption keys and thus bypassing other security measures. However, keyloggers are widely available on the *Internet* and can be used by private parties to spy on the *computer* usage of others.

Left Click Press down once on the left *mouse* button.

Link Hyperlinks are cross-references, highlighted in text in various colors and activated by *mouse-click*. With the aid of hyperlinks, readers can jump to specific information within a document as well as to related information in other documents and *websites*.

Local Area Network A local area network (LAN) is a *computer network* covering a small physical area, like a home, office, or small group of buildings, such as a school, or an airport. Also known as an Intranet.

Location Bar A *URL* bar, or location bar/address bar, is a *widget* in a *web browser* which indicates the *URL* of the *web page* currently viewed. A new page can be viewed by typing its URL to the URL bar.

In most *browsers*, the URL value can often be auto-completed, either by looking up similar URLs from the history or by using keyboard shortcut for URL completion. For *websites* which use favicon (a small icon that represents the website), there will also be a small *icon* in the URL bar.

The URL bar is also used, in some web browsers, to indicate the security status of the web page. Various colors and padlock icons show if the page is encrypted and how trustworthy the communication is.

Malware Short for *malicious software*, software specifically to damage or disrupt a system, such as a *virus*, *worms*, *spyware*, or *trojan*.

Markup Language A markup language is an artificial language using a set of annotations to text that give instructions regarding the structure of text or how it is to be displayed.

Menu In computing and telecommunications, a menu is a list of commands presented to an operator by a *computer* or communications system. They may be thought of as shortcuts to frequently used commands that avoid the operator having to have a detailed knowledge or recall of syntax.

Menu Bar A menu bar is a feature of most *computer graphical user interfaces* that implement windows. The menu bar allows the user to have point-and-click access to window-specific functions, such as saving a file, copying text, or opening a help *window*.

Mouse In computing, a mouse (plural mice or mouses) functions as a pointing device by detecting two-dimensional motion relative to its supporting surface. Physically, a mouse consists of a small case, held under one of the user's hands, with one or more buttons. It sometimes features other elements, such as "wheels", which allow the user to perform various system-dependent operations, or extra buttons or features can add more control or dimensional input. The mouse's motion typically translates into the motion of a pointer on a display.

Object In its simplest embodiment, an object is an allocated region of storage. Since programming languages use variables to access objects, the terms object and variable are often used interchangeably. However, until memory is allocated, an object does not exist.

Operating System An operating system (commonly abbreviated OS and O/S) is the software component of a computer system that is responsible for the management and coordination of activities and the sharing of the limited resources of the computer. The operating system acts as a host for applications that are run on the machine. As a host, one of the purposes of an operating system is to handle the details of the operation of the hardware. This relieves application programs from having to manage these details and makes it easier to write applications.

Peer-to-Peer A Peer-to-Peer (or P2P) *computer network* uses diverse connectivity between participants in a network and the cumulative bandwidth of network participants rather than conventional centralized resources where a relatively low number of servers provide the core value to a service or application. P2P networks are typically used for connecting nodes via largely ad hoc connections. Such networks are useful for many purposes. Sharing content files (see file sharing) containing audio, video, data or anything in digital format is very common, and realtime data, such as telephony traffic, is also passed using P2P technology.

PDF Portable Document Format (PDF) is a file format created by Adobe Systems in 1993 for desktop publishing use. PDF is used for representing two-dimensional documents in a device independent and display resolution independent fixed-layout document format. Each PDF file encapsulates a complete description of a 2D document (and, with the advent of Acrobat 3D, embedded 3D documents) that includes the text, fonts, images, and 2D vector graphics that compose the document.

See also:

Foxit Reader http://www.foxitsoftware.com

Adobe Reader http://www.adobe.com

PNG Portable Network Graphics (PNG) is graphic file format that is found more and more often in the *Internet*. The files are compressed with a selectable compression factor, and, as opposed to the JPG format, PNG files are always compressed without any information loss. PNG can save 24 and 8 Bit Color, gray scale and black&white pictures, and,if desired, provide alpha channels that can be used for transparency attributes. Interlaced PNG pictures can be loaded displaying, for example, only every 10th row (or column).

Primary Key A primary key serves as a unique identifier of *database* fields. The unique identification of database fields is used in *relational databases*, to access data in other tables. If reference is made to a primary key from another table, this is termed a foreign key.

Relational Database A relational database is a collection of data items organized as a set of formally described tables from which data can be accessed or reassembled in many different ways without having to reorganize the database tables.

A relational database management system (RDBMS) is a program that lets you create, update, and administer a relational database. An RDBMS takes Structured Query Language (*SQL*) statements entered by a user or contained in an application program and creates, updates, or provides access to the database.

Right Click Press down once on the right *mouse* button.

Spyware *Computer* software that is installed surreptitiously on a personal computer to intercept or take partial control over the user's interaction with the computer, without the user's informed consent.

While the term spyware suggests software that secretly monitors the user's behavior, the functions of spyware extend well beyond simple monitoring. Spyware programs can collect various types of personal information, but can also interfere with user control of the computer in other ways, such as installing additional software, redirecting Web browser activity, or diverting advertising revenue to a third party

SQL Structured Query Language (SQL) is a language used for *database* queries.

TLS/SSL Transport Layer Security (TLS) and its predecessor, Secure Sockets Layer (SSL), are cryptographic protocols which provide secure communications on the *Internet* for such things as web browsing, e-mail, Internet faxing, instant messaging and other data transfers. There are slight differences between SSL 3.0 and TLS 1.0, but the protocol remains substantially the same. The term "TLS" as used here applies to both protocols unless clarified by context.

Trojan In the context of computing and software, a Trojan, also known as a Trojan horse, is *malware* that appears to perform a desirable function but in fact performs undisclosed malicious functions. Therefore, a *computer worm* or *virus* may be a Trojan horse.

Upload The inverse operation is to send data from a local system to a remote system, FTP server, or *website*. The difference between uploading and *downloading* is downloading means to receive and uploading means to send.

URL The Uniform Resource Locator (URL) displays the address of a document or a server in the Internet. The general structure of a URL varies according to type and is generally in the form *Service://Hostname:Port/Path/Page#Mark* although not all elements are always required. An URL can be a FTP address, a *WWW* (HTTP) address, a file address or an e-mail address.

Virus A *computer* virus is a computer program that can copy itself and infect a computer without permission or knowledge of the user. The original may modify the copies or the copies may modify themselves, as occurs in a metamorphic virus. A virus can only spread from one computer to another when its host is taken to the uninfected computer, for instance by a user sending it over a network or carrying it on a removable medium such as a floppy disk, CD, or USB drive. Additionally, viruses can spread to other computers by infecting files on a network file system or a file system that is accessed by another computer. Viruses are sometimes confused with computer *worms* and *Trojan* horses. A worm, however, can spread itself to other computers without needing to be transferred as part of a host. A Trojan horse is a file that appears harmless until executed. In contrast to viruses, Trojan horses do not insert their code into other computer files. Many personal computers are now connected to the *Internet* and to *local area networks*, facilitating their spread. Today's viruses may also take advantage of network services such as the *World Wide Web*, e-mail, and file sharing systems to spread, blurring the line between viruses and worms.

Web Application In software engineering, a web application or webapp is an application that is accessed via *web browser* over a *network* such as the *Internet* or an *intranet*. It is also a *computer* software application that is coded in a browser-supported language (such as *HTML*, JavaScript, Java, etc.) and reliant on a common *web browser* to render the application executable.

Web Browser A web browser is a software application which enables a user to display and interact with text, images, videos, music, games and other information typically located on a *Web page* at a *website* on the *World Wide Web* or a *local area network*. Text and images on a Web page can contain *hyperlinks* to other Web pages at the same or different website. Web browsers allow a user to quickly and easily access information provided on many Web pages at many websites by traversing these links. Web browsers format *HTML* information for display, so the appearance of a Web page may differ between browsers.

See also:

Mozilla Firefox http://http://www.mozilla.com/en-US/firefox/

Opera Web Browser http://www.opera.com

Internet Explorer http://www.microsoft.com/windows/products/winfamily/ie/default.mspx

Safari http://www.apple.com/safari/

Web Page A web page or webpage is a resource of information that is suitable for the *World Wide Web* and can be accessed through a *web browser*. This information is usually in *HTML* or XHTML format, and may provide navigation to other web pages via *hypertext links*.

Website A website (alternatively, web site or Web site, from the proper noun *World Wide Web*) is a collection of Web pages, images, videos or other digital assets that is hosted on one or more web servers, usually accessible via the *Internet*.

Weight In Prognotus, weights are used to sort a list of objects. Weights are do not print. The use of weights is optional.

Widget In computer programming, a widget (or control) is an element of a graphical user interface (GUI) that displays an information arrangement changeable by the user, such as a window or a text box.

Window A window is a visual area, usually rectangular in shape, containing some kind of user interface, displaying the output of and allowing input for one of a number of simultaneously running *computer* processes. Windows are primarily associated with graphical displays, where they can be manipulated with a pointer. A *graphical user interface* (GUI) that uses windows as one of its main metaphors is called a windowing system.

World Wide Web The World Wide Web (commonly shortened to the Web or WWW) is a system of interlinked *hypertext* documents accessed via the *Internet*. With a *Web browser*, one can view Web pages that may contain text, images, videos, and other multimedia and navigate between them using *hyperlinks*.

Worm A computer worm is a self-replicating *computer* program. It uses a network to send copies of itself to other nodes (computer terminals on the network) and it may do so without any user intervention. Unlike a *virus*, it does not need to attach itself to an existing program. Worms almost always cause harm to the network, if only by consuming bandwidth, whereas viruses almost always corrupt or modify files on a targeted computer.

XHTML The Extensible Hypertext Markup Language, or XHTML, is a *markup language* that has the same depth of expression as *HTML*, but also conforms to *XML* syntax.

XML The Extensible Markup Language (XML) is a general-purpose specification for creating custom *markup languages*. It is classified as an extensible language because it allows its users to define their own elements. Its primary purpose is to help information systems share structured data, particularly via the *Internet*.

HOWTO

Mailing Labels

This how-to describes creating mailing labels in Microsoft Word XP. You can use a similar process with other word processors and MS Office versions as well.

1. Run the "Client Addresses" Report under "CSV Reports" in Prognotus.
2. Save the file onto your computer.
3. Open a new document in Microsoft Word.
4. Open *Tools* → *Letters & Mailings* → *Mail Merge Wizard*
5. Select "Labels", Click "Next"

6. Select "Change document layout"
7. Click "Label Options"
8. Choose the proper label template for your labels.
9. Click "Next"
10. Select "Use an existing list"
11. Select "Browse"
12. Find and open the CSV file saved in step 2. You can select all client address or only a few depending on you needs during this step.
13. Click "Next"
14. Click "Address Block"
15. Click "OK" the defaults should be fine.
16. Click "Update all labels"
17. Click "Next". It should be done. Click "Next" again and print your labels.

Quick References

Military Time Cheat Sheet

Hour	AM	PM
1	1:00	13:00
2	2:00	14:00
3	3:00	15:00
4	4:00	16:00
5	5:00	17:00
6	6:00	18:00
7	7:00	19:00
8	8:00	20:00
9	9:00	21:00
10	10:00	22:00
11	11:00	23:00
12	12:00	00:00

Visual Elements

Icons and images used in Prognotus are listed below. The icon functionality aims to be consistent throughout the application.

Icon Descriptions

 **Add** Adds an association between one *object* with another.

 **Alert** Used to indicate a high level of importance.

 **Calendar** The Client event calendar. (Not Functional)

Clear Clears information or starts over.

Delete Permanently deletes an *object* and all associations.

Clear Caseload Removes Clients from a Users caseload.

Edit Modifies an *object* (Client, Plan, Progress Note, etc). In the case of Progress Notes a red shaded icon indicates "Incomplete", gray is "Unbillable", and green is "Billable".

Information Used to indicate new or interesting information.

Key Security/Password

Lock Used to indicated an *object* is secured from editing.

Medical/Health A Client's Medical or Health information. (Not Functional)

OK Used to indicate an event worked as expected or a good outcome.

PDF Creates a PDF file formatted for printing.

People/Caseload Show Clients assigned a to particular user.

Pharmacy Client's Medications. (Not Functional)

Remove Removes associations between *objects*.

View Shows a summary of an *object* (Client, Plan, etc).

Warning Indicates important information.

Work/Employement Employment Section. (Not Functional)

World/Internet Opens a map on the internet to the address listed.

Alert Notification Levels

Prognotus has four levels of alerts: Information, OK, Warning, and Alert.

Information Level: Helpful FYI.

OK Level: Action completed.

Warning Level: Import Information!

Alert Level: Something may have gone wrong!

Keyboard Shortcuts

Calendar Widget

The DHTML Calendar *widget* is an (*HTML*) user interface element that gives end-users a friendly way to select date and time. It works in a *web browser*. You can use the keyboard to select dates (only for popup calendars, and the keyboard shortcuts may not work in all browsers). The following keys are available:

- ← , → , ↑ , ↓ – select date
- CTRL + ← , → – select month
- CTRL + ↑ , ↓ – select year
- SPACE – go to today date
- ENTER – accept the currently selected date
- ESC – cancel selection

Browser Access Keys

Using Access Keys is theoretically simple, although browser manufacturers have yet to agree on a standard way of using them. Here is a list describing the various browser's methods for utilizing Access Key functionality:

Windows

- Firefox: Alt + Shift + Access Key
- Opera: Shift + Esc + Access Key
- Internet Explorer: Alt + Access Key + Enter
- Safari Ctrl + Alt + Access Key

Macintosh

- Firefox: Ctrl + Access Key
- Opera: Shift + Esc + Access Key
- Safari: Crtl + Access Key

Linux

- Konqueror: Crtl + Access Key
- Firefox: Alt + Shift + Access Key
- Opera: Shift + Esc + Access Key

Prognotus Access Keys

- Access Key + 1 = [*Dashboard*] Jump to “Dashboard”
- Access Key + c = [*Clients*] Jump to “Caseload”
- Access Key + f = [*Clients*] Jump to “Favorites”
- Access Key + a = [*Clients*] Jump to “All Clients”
- Access Key + r = [*Progress Notes*] Jump to “Recent Progress Notes”
- Access Key + i = [*Progress Notes*] Jump to “Incomplete Progress Notes”
- Access Key + t = [*Progress Notes*] Jump to “Draft Progress Notes”
- Access key + s = [*Save Note*] Saves current note

Prognotus Manuals

Use HTML Manual from any browser for on-line reading.

Use PDF Manual for off-line reading on a computer.

Change Log

Prognotus Changes

1.1 Changes

1.1.12 (October 28, 2016)

- ADDED: Creator Productivity Report (NEW)
- RENAMED: Creator Productivity Report to Creator Daily Productivity Report

1.1.11 (September 02, 2016)

- FIXED: Client search bug where archived clients can been found.

1.1.10 (April 08, 2016)

- FIXED: CSV Report: Client Report to include Insurance

1.1.9 (April 01, 2016)

- UPDATED: Add Insurance number to Client data.
- UPDATED: CSV Report: Client Report to include Insurance.

1.1.8 (January 26, 2016)

- UPDATED: Moved list by funder to Client tab.

1.1.7 (December 11, 2015)

- ADDED: MCO assignments to Client.
- ADDED: Clients by Funder CSV Report.
- ADDED: Creator Productivity Report.
- REMOVED: Billing agency from Client.
- UPDATED: Billable Service Units report.

1.1.6 (July 17, 2015)

- UPDATED: Moved Pnote Activity preferences to group table.
- UPDATED: Handle Activity Type and Category preferences independently.

1.1.5 (July 15, 2015)

- FIXED: PDF Time Card rounding issue.
- UPDATED: Time Card, removed Premium (P) as an option.

1.1.4 (June 12, 2015)

- FIXED: CSV client selection not filtering.

1.1.3 (June 05, 2015)

- ADDED: Rate code filter to Reports.
- ADDED: Rate code column to CSV Billable Service Unites.

1.1.2 (May 03, 2015)

- FIXED: Time Card Creator week ending missing last entry ending a midnight.
- FIXED: Time Card Creator total time floating point precision not limited to 2.

1.1.1 (May 02, 2015)

- FIXED: Account lock/archive locking.

1.1 (May 01, 2015)

- UPDATED: Passwords expire every 180 days.
- ADDED: Basic MSL timecard creation.

1.0 Changes

1.0.3.39 (April 13, 2015)

- FIXED: Pnote search history issues.

1.0.3.38 (April 10, 2015)

- **REMOVED: Deprecated CSA CM Reports.**
  - Billable Units (CSA CM) use Billable Service Units.
  - PCHS-GP Billable Units (CSA CM) use PCHS-GP Billable Units.
- ADDED: Lunch Pnote template.
- UPDATED: Pnote search options.
- FIXED: Large data tables not sorting.
- FIXED: Service Type duplicates not caught.

1.0.3.37 (December 02, 2014)

- UPDATED: SSN validator to reflect new SSA rules.

1.0.3.36 (November 14, 2014)

- ADDED: Therapy outline.

1.0.3.35 (October 31, 2014)

- ADDED: Hide archived service types for new goals.
- FIXED: Error handling for note search.

1.0.3.34 (October 10, 2014)

- **ADDED: CASELOAD option to CSV reports.**
  - Select only one user or none.
  - CASELOAD and no user selected returns "Your Caseload."
  - CASELOAD only works for reports that use the "Clients" field.
- ADDED: Daily simple unit calculation rule.

1.0.3.33 (September 17, 2014)

- FIXED: Report creator fails.

1.0.3.32 (September 16, 2014)

- FIXED: Accessibility issues with objectives and IE.

1.0.3.31 (August 27, 2014)

- ADDED: Goal reviews to Objective PDF report.

1.0.3.30 (August 08, 2014)

- FIXED: Rare stale data event resulting in two current notes.
- FIXED: View note history difference failure.
- FIXED: Progress Note Report eSignature gets cut off (in most cases).
- ADDED: Note critical error messages to user log.

1.0.3.29 (July 25, 2014)

- ADDED: Email notices when account is locked.
- ADDED: Search notes by note, created, or updated date.
- ADDED: Auto Review if marked not billable preference for group.
- UPDATED: No longer store temporary password for archived users.

1.0.3.28 (July 20, 2014)

- FIXED: Jail job not using email configuration.
- ADDED: Ability to archive Client Events.

1.0.3.27 (April 18, 2014)

- FIXED: Goal error messages not properly caught.

1.0.3.26 (March 14, 2014)

- ADDED: CSA IHH GP Report.
- ADDED: Ability to archived Client Events.

1.0.3.25 (March 07, 2014)

- UPDATED: Access keys have been changed.
- UPDATED: Set focus to client search field on page load.

1.0.3.24 (February 28, 2014)

- UPDATED: Medication list format.

1.0.3.23 (January 17, 2014)

- UPDATED: Calendar Picker. Can choose two years forward.
- UPDATED: Removed webkit speech.

1.0.3.22 (December 20, 2013)

- FIXED: Medication list report.

1.0.3.21 (December 13, 2013)

- ADDED: Client Medications
- ADDED: Password history checking
- ADDED: Defaults for company specific settings
- FIXED: Medical list error after session expires

1.0.3.20 (November 27, 2013)

- UPDATED: Draft created dates not kept; created when signed now.
- UPDATED: Improved Pnote search. Use "!, & or |" in "Note Contains" field. * ! = NOT, & = AND, | = OR * Example: "Foo|Bar" finds Foo and/or Bar.
- ADDED: Medical Diagnosis History, uses ICD-10 codes.
- ADDED: Medical Procedure History, uses ICD-10 codes.
- ADDED: Health Assessment
- ADDED: Health Allergies

1.0.3.19 (October 11, 2013)

- UPDATED: Client Report no longer includes archived clients.
- FIXED: Issues handling midnight in some reports.
- REMOVED: Convert T2020 to T2021 on note save.

1.0.3.18 (August 16, 2013)

- ADDED: Service Type check before note save.

Service T2020 becomes T2021 if time requirements are not met.

1.0.3.17 (August 09, 2013)

- FIXED: User History Report.

1.0.3.16 (July 15, 2013)

- FIXED: QA CSV “Client Report”.

1.0.3.15 (July 12, 2013)

- UPDATED: CSA Accounting “Account String”.
- ADDED: QA CSV “Client Report”.

1.0.3.14 (July 02, 2013)

- **FIXED: Some reports used wrong service type reference.**
  - CM Reports still only uses client reference.
- UPDATED: Date note originally created visible to QA.
- ADDED: User history CSV Report

1.0.3.13 (March 22, 2013)

- **UPDATED: Late Reports**
  - Reduced to one report
  - Days field added to specify days (default: 3)

1.0.3.12 (March 08, 2013)

- UPDATED: Limit draft edits to QA Admins.
- FIXED: Pnote saves when no changes made.

1.0.3.11 (February 15, 2013)

- UPDATED: Include archived clients in client search.
- UPDATED: Include archived clients in note search.

1.0.3.10 (February 01, 2013)

- UPDATED: Moved more options to configuration file.
- UPDATED: Progress note admin purge function.

1.0.3.9 (January 31, 2013)

- UPDATED: Company name, admin email recipients moved to conf file.

1.0.3.8 (January 30, 2013)

- UPDATED: Separation of CSA and MSL databases.
- UPDATED: RSS feed URL obtained from configuration file.

1.0.3.7 (January 25, 2013)

- FIXED: Users unable to edit email address
- UPDATED: Software dependencies
- UPDATED: Hardware and software configurations

1.0.3.6 (December 21, 2012)

- UPDATED: Performance improvements
- UPDATED: QA Needs Review countlimited to notes created in last 180 days.

1.0.3.5 (November 30, 2012)

- UPDATED: HCBS groups merged.
- UPDATED: Calendar ID Daily billable day changed to 8 hours averaged over calendar month.

1.0.3.4 (October 03, 2012)

- FIXED: Review rate calculation.
- FIXED: Error when adding new goal.

1.0.3.2 (September 28, 2012)

- UPDATED: QA can edit others plans.
- UPDATED: Goals, added date range for service type changes.
- FIXED: Pnote caseload search.

1.0.3.1 (September 10, 2012)

- ADDED: Show user name on password page.
- ADDED: Overlap report.
- FIXED: Allow Draft Deletion Regardless of Age.
- FIXED: Client Archive Fails when in a user's favorites.

1.0.3 (August 03, 2012)

- ADDED: Service Type filter it Pnote PDF Reports.
- ADDED: Billable tag to PDF Reports.

1.0.2j (July 20, 2012)

- FIXED: Dublicate key error not caught.
- UPDATED: CSA CM billable unit calculations.

1.0.2i (July 06, 2012)

- UPDATED: QA can only edit read only notes.
- UPDATED: QA Admin can only edit billed notes.

1.0.2h (June 25, 2012)

- UPDATED: Usernames to allow non-plain text.
- UPDATED: More curve to error rate calculations.
- ADDED: QA Admin group.
- UPDATED: QA Admin can only edit read only notes.
- UPDATED: QA Admin can only change user auto-review setting.
- UPDATED: QA Admin can only bulk set notes to pass.
- FIXED: Set pass function not recorded in history.
- FIXED: Password page view showed wrong dates.

1.0.2g (May 11, 2012)

- FIXED: Shifts ending at midnight not appearing in calendar.
- FIXED: Drop down fields not getting updated.
- UPDATED: Password length increased to 8 to match e-mail. Checks tweeked
- UPDATED: Python(2.7), Postgresql(9.1), Cracklib, z3c.rml, and various dependencies.

1.0.2f (February 17, 2012)

- ADDED: Search by Client ID.
- ADDED: Temporary password access for QA & Supervisor groups.
- UPDATED: User Pnote review rate can now be less than 10% again.

1.0.2e (February 03, 2012)

- FIXED: Add client field validation bug.

1.0.2d (January 27, 2012)

- FIXED: User removed from guest group on archive.
- ADDED: Hire date to user report.
- ADDED: Add user redirects to user list now.

1.0.2c (December 30, 2011)

- UPDATED: Changed shift summary templete.

1.0.2b (December 19, 2011)

- FIXED: Caseload Progress Note search did not include all note writers.

1.0.2 (December 16, 2011)

- ADDED: Search Progress Notes by Caseload
- ADDED: User Hire Date
- ADDED: User Term Date
- ADDED: User lock at scheduled time (Day ofter term date)
- ADDED: Voice Recognition to some fields. Google Chrome support only.
- ADDED: eSignature statement on PDF Pnotes report.
- ADDED: Second signatures to Pnotes.
- ADDED: QA ability to update Pnotes, add objectives, etc.
- ADDED: Pnote diff view.
- UPDATED: User Pnote review rate can't be less than 10%.
- UPDATED: User Pnote review rate calculation formulas.

1.0.1b (September 30, 2011)

- FIXED: Password Reset Redirect.
- FIXED: Default user listing for supervisors and admins.

1.0.1a (September 27, 2011)

- FIXED: CSV Report bug.

1.0.1 (September 23, 2011)

- ADDED: Client Favorites.
- ADDED: Drafts to Progress Note menu.
- ADDED: Global client search form.
- ADDED: Caseload icon to client lists.
- ADDED: "Add Event" checkbox to new progress note.
- UPDATED: Global menu. Moved links in tabs into menu for touch screens.
- FIXED: User comment progress note link.
- FIXED: Group plans report.

1.0 (September 16, 2011)

- UPDATED: !TurboGears to version 1.5.

0.9 Changes

0.9.2.50 (August 19, 2011)

- ADDED: User limit by caseload option.
- FIXED: Supervisor employee list no longer show archived users.
- FIXED: Report submit broken for some browsers.

0.9.2.49 (August 12, 2011)

- FIXED: PCHS-GP Billable Units (CSA CM) Report.
- UPDATED: Client Calendar
- UPDATED: Shifts changed to (0-8,8-4,4-10, 10-12).
- UPDATED: Count note for each shift it spans.
- UPDATED: Count only notes finished with QA process.
- UPDATED: Count only billable notes.
- ADDED: Link to day's notes.

0.9.2.48 (July 22, 2011)

- UPDATED: PCHS-GP CSA CM Billable Report.
- UPDATED: Billable Units (CSA CM) Report.
- ADDED: PCHS-GP Billable Report.

0.9.2.47 (July 15, 2011)

- FIXED: Viewing client form errors out when not in same group.
- UPDATED: Added additional info to the calendar.

0.9.2.46 (July 08, 2011)

- ADDED: CSA GP accounting client fields.
- ADDED: GP CSA CM experimental report (No ISA yet).
- UPDATED: Client-side cache controls.

0.9.2.45 (June 17, 2011)

- ADDED: Client-side cache controls.
- UPDATED: User Report, added "user created" column.

0.9.2.44 (May 20, 2011)

- ADDED: Filter billable hours by Service Code to calendar.
- UPDATED: Calendar to use the client's default group service type.
- FIXED: Billable Activity search included notes still in QA process.

0.9.2.43 (May 13, 2011)

- FIXED: TAY billing service unit report (ALL) fails.
- ADDED: CSV Report, "Incompletes Report".

0.9.2.42 (April 15, 2011)

- ADDED: Use last date user preference (New progress note uses your last note's date). This works per user avoiding one of the prior issues with this feature.
- UPDATED: ISA and KEY outcomes.

0.9.2.41b (April 08, 2011)

- FIXED: Limit Chart Reports.
- FIXED: Client's group specific data not always set.
- FIXED: Billing reports unit rounding error in a few cases.
- FIXED: Billing Client Report (failed when only one client selected).

0.9.2.41a (April 01, 2011)

- ADDED: Help menu with "Service Request".
- ADDED: Service Request
  - Those without agency email can use "Service Request" to submit Maintenance and IT help tickets.
  - Use the location supervisor's email address as the requester if you know it.

0.9.2.41 (March 25, 2011)

- UPDATED: Progress Note date no longer remembers last date.
- UPDATED: Progress Note MH and TAY defaults to NOT billable.

0.9.2.40b (February 04, 2011)

- UPDATED: Hide some fields for new pnote.
- UPDATED: Removed timezone from late report.
- UPDATED: Removed bcc jail notices to admin (Testing complete).
- UPDATED: Improved user logging.
- FIXED: Fixed Event error handling.

0.9.2.40a (January 16, 2011)

- FIXED: PDF Report Form.

0.9.2.40 (January 14, 2011)

- FIXED: Guest Account updates limit removal from guest group.
- FIXED: Guest users can not now be added to other system groups.
- FIXED: Changing service type on goal did not update notes.
- ADDED: Guest user tracking to admin page.
- ADDED: User CSV report for supervisors.
- ADDED: Jail event email notifications.
- ADDED: Client form for billing notes.

- ADDED: Billing Reports.
- UPDATED: User Account updates log updator for group changes.
- UPDATED: Service Type descriptions changed to match funder wording.
- UPDATED: Progress Note report service type more descriptive.
- UPDATED: Report "Entry 7 Days Late" to "Entry 3 Days Late".
- UPDATED: Billings client listing with time billed.
- UPDATED: Most paginated lists increased to 20 rows per page.

0.9.2.39 (January 07, 2011)

- ADDED: Funder to Service Types.
- ADDED: Mail service.
- UPDATED: Improved logging.
- UPDATED: Billing Hab hourly calculation. Now rounds down at 31 minutes.

0.9.2.38 (December 08, 2010)

- ADDED: Progress Note text search.
- ADDED: Service default per client and group.
- UPDATED: Billings - start and end dates are kept.
- UPDATED: Progress Note search time calculation limited to one month.
- UPDATED: A client's "client code" is now group specific.
- FIXED: Billable Service Units Report column "Billable Time".

0.9.2.37 (December 03, 2010)

- ADDED: DRAFT "Billable Service Units" report. Use with caution.
- ADDED: New Events report - "Events (All)".
- UPDATED: "Events" report renamed to "Events (Linked to notes)".
- UPDATED: Reports limited to 31 days.
- FIXED: Flatten time function failed to take new QA process into account.

0.9.2.36a (November 22, 2010)

- FIXED: New user login bug.

0.9.2.36 (November 19, 2010)

- UPDATED: QA Progress Note pass functions.
- UPDATED: User error level calculated once per day.
- UPDATED: QA Group settings have precedence over per user settings.
- UPDATED: Billable Units report.
- UPDATED: Preliminary billing functions.
- ADDED: Preliminary filter billable hours/notes by service.
- ADDED: "Group Activity" to Activity Category.

0.9.2.35 (November 08, 2010)

- ADDED: Service Type to Progress Note search.
- UPDATE: Billing memo can be updated.
- FIXED: QA tag changes now change read/write status of note.
- FIXED: Progress Notes with start or end times at midnight.

0.9.2.34 (November 06, 2010)

- ADDED: Billable checkbox on Progress Note form.
- ADDED: Progress Note error rate to user profiles.
- ADDED: Automation to some QA functions.
- ADDED: Accounting group and billing functions *(Updating billings not finished)*.
- ADDED: Ability to better sort by service type *(Only available for billing at this time)*.
- UPDATED: Improved Progness Note views.
- UPDATED: Progress Note QA tag is now only visible to QA *(CSA use billable checkbox now)*.

0.9.2.33 (October 15, 2010)

- ADDED: User percent review field.
- ADDED: New pnote template.

0.9.2.32 (September 10, 2010)

- UPDATED: Changed Objective size limit.

0.9.2.31 (August 20, 2010)

- FIXED: Limit Identi feed.
- ADDED: Recent Progress Note comments to Dash.
- ADDED: Progress Note comment lists.

0.9.2.30 (July 16, 2010)

- FIXED: Fixed billable activity search.
- UPDATED: Goal formating in Progress Note form.
- UPDATED: New goal service type default is “None”.
- UPDATED: Progress Note comments character limit increased.

0.9.2.29 (June 25, 2010)

- FIXED: CSA QA pnote template display.
- FIXED: User session expunge job.
- FIXED: Polk jail check, site structure changed.

0.9.2.28 (June 18, 2010)

- FIXED: Session cleanup job not working.
- ADDED: Disable activity pnote fields for MELC group.
- ADDED: CSA ISA/KEY progress note template.
- ADDED: Billable units CSV report.
- ADDED: QA CSV Reports (“7 days late entry”, “After 3rd day”)
- ADDED: Additional CSV Contacts report with billable units.
- UPDATED: Removed title from CSV reports.

0.9.2.27 (June 4, 2010)

- ADDED: Automated tasks: Purge notes and DB session clean ups.

0.9.2.26 (May 28, 2010)

- ADDED: Identi.ca feed to dashboard.
- ADDED: Administrative logging area.

0.9.2.25 (May 21, 2010)

- ADDED: Beginning unit tests.
- ADDED: Start of user productivity. (Not accessible yet)
- UPDATED: QA permissions.

0.9.2.24 (May 19, 2010)

- FIXED: QA progress note critical bug.
- UPDATED: Progress Note icons.

0.9.2.23a (May 16, 2010)

- FIXED: Security bug.

0.9.2.23 (May 14, 2010)

- FIXED: Billable calendar daily client with zero hour day marked billable.
- FIXED: My Plans Report is the Caseload report.
- FIXED: Note listed more then once in Goal notes if multiple Objectives selected.
- ADDED: QA HCBS template for billing notes.
- ADDED: “Paper Documentation Reference” to Activity Category for QA use.
- ADDED: BI billable days to hours billable calendar.

0.9.2.22 (May 07, 2010)

- FIXED: Plan search issues with dates.
- FIXED: Last login not recorded.
- FIXED: Pass on notes date form.
- ADDED: Client name to staff comments list.
- UPDATED: Billable Hours calendar now works for daily clients.

0.9.2.21 (April 30, 2010)

- ADDED: Flattened billable hours client calendar.
- ADDED: User’s remote IP to user log.

0.9.2.20 (April 23, 2010)

- FIXED: Progress Note report get user title/name for note signature.
- FIXED: Some forms not validating.
- ADDED: Common group default for new user title.
- ADDED: Flatten overlapping time option in Billable Activity searches.
- UPDATED: Most common user titles listed first, then alphabetically, in selection.

0.9.2.19 (April 09, 2010)

- FIXED: Team billable activity too slow.
- FIXED: User creation fields validated.
- ADDED: User job title look-up.

0.9.2.18 (April 02, 2010)

- UPDATED: Billable activity now paginated.
- UPDATED: New note show signature for current user and other clues.
- ADDED: Plan description to plans reports.

0.9.2.17a (March 29, 2010)

- FIXED: Add user & client forms.

0.9.2.17 (March 26, 2010)

- UPDATED: Unhide pnote activity type from HCBS Supervisors.
- FIXED: Warn user if draft note(s) are over one week
- **UPDATED: Electronic Signature with clear intent to sign.**
  - Default status of a new note is now “Draft”.
  - User must change status to “Completed/Signed” = intent to sign.
  - Added visual feedback of status (Submit button text changes).
- UPDATED: Converted from Kid to Genshi templates.

0.9.2.16 (March 05, 2010)

- FIXED: Pagination duplicate issues.

0.9.2.15 (January 29, 2010)

- FIXED: QA tagging shouldn't have changed updator or updated date.
- FIXED: User unlocking improved, user now has 30 days to log in.
- ADDED: User search by employee ID.
- ADDED: Progress Note time total to save message.
- ADDED: Progress Note time total to note views.
- UPDATED: Logging expanded.

0.9.2.14 (January 22, 2010)

- FIXED: Pagination button style now consistent.
- ADDED: Progress Note revision history viewing if authorized.
- ADDED: User Progress Note browsing.
- ADDED: Progress Note creator can respond to QA comments.

0.9.2.13 (January 15, 2010)

- FIXED: Removed ability to add user with wrong default group.
- FIXED: Unlocked user will be locked again within 24 hours if last login is old.
- FIXED: Removed ability to create a note for a client not in current group.
- UPDATED: "CSA PCHS Extended" report.
- **UPDATED: "Billable Activity" available for all groups now.**
  - Moved Caseload Activity to "User" menu.
  - Added Group Activity to "Team" menu.
- UPDATED: Timezone info hidden.
- UPDATED: QA pass on progress notes limited to daily clients only.

0.9.2.12 (December 15, 2009)

- FIXED: Error when adding new user.

0.9.2.11 (December 04, 2009)

- **ADDED: Progress Note template options.**
  - Available to MSL groups only.
- **ADDED: Daily stale user processing.**
  - User is locked if no activity for 90 days.
  - User is archived if no activity for 180 days.

- **UPDATED: Archiving user method.**
  - Client caseload is cleared.
  - User is removed from any system groups.
  - Supervised employees are transfered to admin user (listed as None).
- ADDED: Progress Note QA pass.

0.9.2.10 (November 27, 2009)

- UPDATED: Progress Note views.
- ADDED: Activity Category to note search.

0.9.2.9 (November 20, 2009)

- ADDED: Billing Code to Progress Note views

0.9.2.8 (November 13, 2009)

- UPDATED: Signature formating

0.9.2.7 (November 06, 2009)

- ADDED: CSA PCHS Export.
- ADDED: User Password Expire method.

0.9.2.6a (October 31, 2009)

- FIXED: Error updating Progress Notes.

0.9.2.6 (October 30, 2009)

- FIXED: Handle daylight savings.

0.9.2.5a (October 12, 2009)

- FIXED: JavaScript bugs.
- Clearing browser cache may be required.

0.9.2.5 (October 09, 2009)

- UPGRADED: Framework to TG1.1
- UPGRADED: SQLObject to 11.2
- UPDATED: User tab available to everyone.
- FIXED: User plans logic.

0.9.2.4 (October 02, 2009)

- FIXED: Polk County jail check.
- FIXED: Quarterlies calculations.
- ADDED: Activity Category to notes.
- UPDATED: Reverted back to creator and their supervisor only can modify a plan.

0.9.2.3 (September 25, 2009)

- ADDED: Plan start date.
- ADDED: Plan Schedules PDF (start date, quarterlies)
- FIXED?: Some Events not showing in list
- BROKE: Jail site changed, so auto check is off until fixed.

0.9.2.2 (September 04, 2009)

- FIXED: Minor Reports bug.

0.9.2.1 (August 21, 2009)

- FIXED: Move ActionStep validation.
- FIXED: On delete also remove progress note children.
- FIXED: Pre-signature viewing issue.
- UPDATED: QA dashboard work-flow.
- ADDED: Plan searching and listings.
- ADDED: List progess notes related to a Goal.
- ADDED: Administration page.

0.9.2 (August 14, 2009)

- UPDATED: Logging
- UPDATED: Progress Note views (added T19 & DOB)
- FIXED: Date handling issues when date is before 1900.

- ADDED: Date validation and limits to some forms.
- ADDED: Pretty format for electronic signatures.

0.9.1.139a (August 07, 2009)

- Fixed: Bug introduced in 0.9.1.139 update.

0.9.1.139 (August 07, 2009)

- UPDATED: User group management.
- FIXED: Search by User's user name also.
- UPDATED: Form error handling.

0.9.1.138 (July 31, 2009)

- Meets Electronic Signature requirements.
- ADDED: Paginated Progress Note browsing by Client.
- UPDATED: Only admin group can change MSL Client Code once set.
- FIXED: Resetting own password locks user out.
- ADDED: Progress Note versioning (functioning, but not viewable yet).
- NOTE: Progress Notes marked "Complete or Delete" cannot be changed to Draft.

0.9.1.137a (July 17, 2009)

- UPDATED: Notes created over 1 year old cannot be changed.

0.9.1.137 (July 10, 2009)

- ADDED: Progress Notes date limited to 12 hours in the future and 1 year past.
- ADDED: Notes over 1 year old cannot be changed.
- ADDED: Prevent saving note when nothing changed.
- UPDATED: Outcome graphs.

0.9.1.136 (July 07, 2009)

- ADDED: Document Status (Completed, Draft or Delete) option when saving a note.
- ADDED: Client caseload billable time page - under the Clients tab (CSACM/SC Only).
- UPDATED: Changed notes "Pending QA Review" list order.
- UPDATED: Plans/Events status hidden when there is nothing to display.

0.9.1.135b (June 19, 2009)

- FIXED: Guest user bugs.

0.9.1.135a (June 01, 2009)

- FIXED: Saving note validation errors fixed!

0.9.1.135 (May 29, 2009)

- UPDATED: Renamed "Default Group" to "Current Group".
- UPDATED: Removed Progress Note "Group" select field and replaced with a simple label.
- FIXED: Managers, Supervisors can not attach events to other user's notes.

0.9.1.133 (May 15, 2009)

- REMOVED: External elementtree requirement (Python 2.5 now required).
- UPDATED: Production server scaled to two processes / 20 threads per process to handle increased load.

0.9.1.132 (April 24, 2009)

- UPDATED: Passwords
  - New passwords good for 1 year.
  - Temporary passwords only allow login to create a new password.
  - Fixed missing proper name check.
- FIXED: Goal sheet included archived steps.
- UPDATED: Changed "Supervisor" role.
- FIXED: Unlinked Events for archvied clients were counted.

0.9.1.131 (April 17, 2009)

- REMOVED: County reference in RateCode.
- UPDATED: Rate Code single select.

0.9.1.130 (April 03, 2009)

- UPDATED: Service Type single select.
- REMOVED: Activity Type default for notes.
- FIXED: Small bug.

0.9.1.129 (March 20, 2009)

- ADDED: User title to some displays.

0.9.1.128 (March 13, 2009)

- ADDED: Notice after Progress Note save.
- FIXED: Minor Bug.

0.9.1.127 (February 27, 2009)

- UPDATED: Visual elements.
- ADDED: Identity Stamp to notes.
- FIXED: Only Progress Note creator may update a note.

0.9.1.126 (February 20, 2009)

- FIXED: Billing reports.

0.9.1.125 (February 20, 2009)

- UPDATED: QA Comments Form.
- UPDATED: Comments section only shows note has comments.

0.9.1.124 (February 13, 2009)

- ADDED: Legal Events to Dashboard (last seven days).
- ADDED: Auto event if in Polk jail (checks hourly).
- ADDED: Nickname to client search.
- ADDED: Progress Notes logging.
- UPDATED: Progress Notes marked "Delete" do now show in reports.
- FIXED: Progress Notes marked "Delete" do on show in lists and search unless requested.
- QA Workflow completed.

0.9.1.123 (February 03, 2009)

- FIXED: Duplicates in some reports.
- MOVED: "Billing Report" to "Contact Report".
- MOVED: "Service Report (Billable)" to "Medicaid Billable Report." (shows those marked "Billable and linked to goal/objective(s)).
- DELETED: "Service Report (Unbillable).

- ADDED: “Billable Report” (shows all marked “Billable”).
- UPDATED: “Activity Report” (includes QA).

0.9.1.122 (February 02, 2009)

- FIXED: Internet Explorer Javascript bug.
- UPDATED: Re-arranged Columns in Client list.

0.9.1.121 (January 30, 2009)

- ADDED: Time total in Search Notes results.
- UPDATED: Progress Note Form.
- UPDATED: Service Report (Billable). Now used “billable” QA tag.
- UPDATED: Archiving Plans, Goals, etc now archives everything below it. (e.g. Archiving a Plan now archives it’s goals, those goals objectives, and those objectives steps.)
- UPDATED: Events (Removed limits on creating events, added group ID).
- UPDATED: Search Notes form.
- FIXED: “Don’t show archived users.”
- FIXED: “Add lock to archiving methods.”

0.9.1.120 (January 02, 2009)

- ADDED: Delete to QA options. Currently this only notifies an administrator of a Progress Note deletion request.

0.9.1.119 (December 25, 2008)

- ADDED: QA Notes marked “Unbillable” cannot be changed.

0.9.1.118 (December 20, 2008)

- ADDED: QA Status to Dashboard.
- ADDED: QA Workflow.
- ADDED: QA Notes marked “Billable” cannot be changed.
- FIXED: Progress Notes report incorrect page break.
- FIXED: Plan wasn’t updating when locked.
- UPDATED: TG to version 1.0.8.

0.9.1.117 (December 12, 2008)

- UPDATED: Dashboard.
- ADDED: QA Group and Fields.

0.9.1.116 (December 5, 2008)

These fixes limit future problems for billing and increase data integrity.

- FIXED: Limited Plan creation.
- FIXED: System/Program Group separation.
- FIXED: Limit Supervisor Group.
- FIXED: Plans now read only after linked to a note.

0.9.1.115 (November 21, 2008)

- UPDATED: Progress Note report. Added note IDs.

0.9.1.114 (November 14, 2008)

- UPDATED: Medicaid field now requires correct format.
- ADDED: KEY outcomes to dashboard.

0.9.1.113 (November 07, 2008)

- FIXED: New User visible now checked by default.
- FIXED: Progress Notes not appearing in lists.
- ADDED: "End Time" to Progress Notes search results.
- ADDED: Progress Notes Search option "All Group Notes".
- UPDATED: Progress Notes lists now sortable.
- ADDED: Billing Type table needed for Program/Group specific billing reports.

0.9.1.112 (October 24, 2008)

- UPDATED: Calendar picker (Now has AM/PM Option).

0.9.1.111 (October 23, 2008)

- ADDED: Ability to transfer Plans.
- FIXED: Removed Manager group from Client group options.

0.9.1.110 (October 22, 2008)

- FIXED: Bugs
- UPDATED: Activity Report
- UPDATED: Plan table (Added "lock" column)

0.9.1.109 (October 17, 2008)

- ADDED: Event Delete.
- UPDATED: Objective Statement length increased.
- FIXED: Weights added to Goals Ticket
- FIXED: Guest user visibility
- FIXED: Added nickname field to Client

0.9.1.108 (October 15, 2008)

- ADDED: CSV Export intended for Thunderbird address book import.
- UPDATED: CSV Events Report (list all linked & unlinked events).

0.9.1.107 (October 09, 2008)

- ADDED: Client Search now by Last Name OR First Name.
- ADDED: First Objective now checked by default on New Notes.

0.9.1.106 (October 06, 2008)

- ADDED: MSL fields added to Client.
- ADDED: Legal Settlement added to Client (default=Unknown).
- ADDED: Weights added to Objectives and Steps to control ordering.
- Database cleanup and performance fixes.

0.9.1.104 (October 03, 2008)

- FIXED: Archived Clients no longer included in Mailing Address Report.
- ADDED: Archived User. Archived users not displayed in options lists.

0.9.1.103 (September 30, 2008)

- ADDED: Plan status added to Dashboard.

0.9.1.102 (September 29, 2008)

- UPDATED: Event Types
- UPDATED: Dashboard

0.9.1.101 (September 26, 2008)

- ADDED: Limit Progress Notes Report to 31 days.
- ADDED: Event creator to Events Report and List Progress Notes.
- IMPROVED: Reports error handling.
- ADDED: Beginnings of the Dashboard.

0.9.1.100 (September 22, 2008)

- ADDED: Limit editing of plans, goals, steps to creator.
- UPDATED: Events Fixups (Okay to use now).

0.9.1.99 (September 19, 2008)

- ADDED: Order by no. clients option added.
- FIXED: Printing style to not print navigation tabs.
- ADDED: MSL header for reports.
- ADDED: MSL Group and Users.
- ADDED: ISA Events & DB updates.
- UPDATED: TG to version 1.0.7.

0.9.1.98 (September 12, 2008)

- Updated interface making room for 0.9.2 features.
- Improved archive handling.
- "My" Progress Notes order changed to last updated.

CHAPTER

FIVE

INDICES AND TABLES

- genindex
- search

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