



Module 8: tcm 7 super user workshop

1. Welcome and Introductions

- Trainer intro
- Venue details, tea/coffee, lunch details
- Participants to introduce themselves

2. Objectives for this workshop

This session is designed for experienced users of The Care Manager version 6.11.x or prior. Participants in this workshop will be knowledgeable about adding clients, creating Milestones and other client events; adding and revising diary services etc.

It is hoped that after this session, participants will become advocates for tcm 7 in their workplace and be able to offer support and encouragement to other users.

3. Common elements of the new Switchboards

Relevant to the Switchboards for Clients, Programs, Groups, Group Members, Events and Client Contacts

Navigation Pane

- Toggling the Navigation Pane on and off
- Setting a Open on Startup default

Navigation Pane buttons

Search Pane

- The new look search pane
- Furling and unfurling the Search Pane

Results Pane

- How to customise (adding columns etc)
- How to print a list
- Saving multiple views (similar, but better than the previous 6.11.x save search criteria)

Task Button Bar

- Refresh
- Preview
- Views
- Details
- Add New
- Other
- Discontinued buttons

Preview Pane

Status bar

4. Global Menu Bar

- The top menu bar provides access to all tcm 7 screens

5. Switchboard Search & Filtering Tools

- Views button
- Context Menu
- Quick filter
- Customising search results pane
- Creating a default open on login view

6. Switchboards converted from 6.11.x to tcm 7

- Client
- Program
- Groups
- Scheduled Events (previously called To Do)
- Service Delivery – see under Planned service

7. New Switchboards in tcm 7

- Events Switchboard
- Client Contacts Switchboard
- Calendar Notes Switchboard

8. Looking at the Client Switchboard

Go: Global Menu > Home > Clients

Discussion about the new look Search Pane

Task Bar Buttons

- Refresh
- Preview
- Details (previously Info button)
- Add New
- New Event
- View Event
- History
- Programs
- Contacts
- Scheduled Events (previously the To Do button)

Discontinued buttons

- New Episode - discuss new procedure required
- Workflow - discuss

9. Client Contacts

- No major changes to the contacts box. Access is as per previous versions (i.e. select client at Client Switchboard then click Contacts on the Task bar)
- The new Client Contacts Switchboard

10. Creating Client Events

No major changes in the way that Client Events are created between 6.11.x and tcm 7.

- Common Event header
- At the Client or Program Switchboard, select a client from the Results Pane then select New Event > name of Event from the Task bar.
- View Client Events via the View Event button (Client Episode Switchboard or the Programs Switchboard or via the respective Client or Program History screens.
- Cover spell check, alerts, linking external docs, security settings, Scheduling a future event

Events Switchboard – new in tcm 7

- Search and display Events (Episode or Program level) during any selected date range.
- Filter the type of Event (e.g. Note) by Note type

11. Calendars

A significant new feature in tcm 7 enables users to display more than one calendar at a time.

Calendars and Diaries

- Explanation of the terms

The three ways to access the Calendar

- As per 6.11.x – select a Client, Program or Group then click the Diary button
- Via the Global Menu bar
- Via the Calendar icon at bottom of Navigation Pane

Date Navigation Pane

- Selecting a range of dates (1,2,3 days)
- Selecting a week at a time
- Selecting non-contiguous (e.g. every Tuesday in August)
- Using in conjunction with the Task bar's Views feature (day, week, month etc)

Types of Diaries

- Client Diary
- Program Diary
- Group Diary

For organisations who roster their own workers there are additional Diaries:

- Client Roster (new in tcm 7)
- Program Roster (new)
- Group Roster (new)
- Worker Roster (new)

Open Calendar link

- Opening and displaying a diary

Adding to the Most Recent Used list

- Opening a calendar adds it to the Most Recent Used list
- Selecting and deselecting from the Most Recent Used list

Service colour backgrounds – new in tcm 7

- New in tcm 7
- Each colored background indicates whether it is a Group, Client, Program or Worker Diary

Service status colours – new in tcm 7

- Explanation of what each colour means

Calendar Notes (previously called Diary Notes)

- Adding a calendar Note
- New Calendar Notes Switchboard

Other features

- Rotating arrows indicate recurring service
- Timeline and how to change sizing using Ctrl + and –
- Previous and Next appointments tab

12. Global Menu > Service Delivery menu

- Calendar
- Service Instance Shifts
- Scheduled Events Switchboard
- Service Occurrences Switchboard
- Cost Recoveries Switchboard
- Planned Service Delivery
- Calendar Notes Switchboard
- Schedule Fee
- Timesheets
- Fee Occurrences

13. Adding a new service

- Procedure is similar to 6.11.x
- Changes in tcm 7

14. Planned Services menu options

- Add New Planned Service
- Edit Planned Variation
- Edit Planned Service
- Edit Service Instance
- Cancel Occurrence
- Allocate Purchase Invoice
- Revise Service From
- Terminate Service From
- Delete Planned Service
- Copy Planned Service
- Show Planned Service Deliveries

15. History screen for Clients, Programs and Groups

- New look screens

16. Reporting

- The new reporting screen
- Filtering reports

17. Maintenance screen (previously Management)

- Overview of Maintenance screen features

18. Wizards

- Overview of Wizards

19. New Help feature

- Online help and other available documentation.

20. Major and minor changes in tcm 7

- The Info button in version 6.11.x used to access a Client, Group or Program record is now labelled Details. Buttons previously called "Info" are now all called "Details"
- The Workflow button is not available in tcm 7. Workflow practices can now managed by the use of Consolidated Events.
- The New Episode button at the Client Switchboard in version 6.11.x is gone in tcm 7. Instead, new Episodes for clients are created using the Add New button.
- The Advanced Search button at the Client Switchboard is no more. Searching is now done via the Views, Context and Quick Filters buttons as well as the use of reports.
- Scheduled Events is the new name for the To Do list feature.
- By default, tcm 7's Client Switchboard only shows the client's most recent Episode. This is the reverse of what was the default in 6.11.x.
- The Edit Episode button, previously located on the bottom-left of a client History screen in version 6.11.x, has been removed in tcm 7. To edit a client's Details record from the History screen, click the blue "i" button located on the far-right of the Client field at the top of the screen.
- The History menu used in version 6.11.x is no longer. Creating new Events can be done in tcm 7 via the History's task bar; the Episode Info has been replaced by the "i" button as explained above, and there is now no longer a Workflow screen. Printing a History listing is done from the Preview button on the Task Bar.
- The Event called External Document has been discontinued. All existing External Document Events in 6.11.x will be merged into the Attached Document Event during the migration of your organisation's 6.11.x database to the tcm 7 format.
- Procedures used in the Purchase Invoice Reconciliation have changed.
- Roster Toolkit is now integrated into tcm 7. It is not launched as separate program.
- Group membership is not indicated on a client's Episode Diary in tcm 7.

** END **

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