

MM0815XX

DEACTIVATE ARCHIVE THIS PERSON EDIT THIS PERSON

INFORMATION

Contact: No phone provided
as@gmail.com

Groups: This user is not a member of any groups

TRAFFIC LIGHTS

TRAFFIC LIGHT	HISTORY	CURRENT
TPB_TK_Veränderungsmotivation (gP4)		

SCHEDULES

QUESTIONNAIRE	SINCE	FREQUENCY	TIMESLOT
TPB_MM0815	05/31/2016	täglich	15:00 - 22:00

DOCUMENTS

Dokument hochladen: [Datei auswählen](#) Keine ausgewählt

COMMENT

INSERT COMMENT

#create_new_client

General information:

This presentation will tell you how to create new clients in the SNS system and:

- How to add general information about new clients,*
- How to schedule questionnaires, and*
- How to apply traffic lights*

For information concerning the creation of new questionnaires, new traffic lights and more, please consult further chapters of our handbook, e.g.:

#create_process_questionnaire, #create_outcome_questionnaire or #create_traffic_lights

content: ②

1. click on "Clients" at the sidebar
2. click on button "NEW USER" opens the edit page for a new client
3. add user-/client-name (usually anonymous)
4. define first login-password
5. click the tab „SCHEDULES“
6. click on button „ADD SCHEDULE“
7. choose the applicable questionnaire
8. define the applicable frequency of questionnaire iterations:
 - always (questionnaire remains active at all times)
 - once (questionnaire can be filled only a single time)
 - daily
 - weekly
9. "SAVE" this schedule



10. Click on tab "TRAFFIC LIGHT"
11. Click on button "ADD TRAFFIC LIGHT"
12. Choose traffic light (here TPB_TK)
13. Send automatic e-mails to respective users when threshold is crossed
14. Define threshold (% of maximum)
15. Define window width for calculation of a traffic light score
16. "SAVE TRAFFIC LIGHT"
17. "SAVE USER", after having edited all information, schedules and traffic lights

Starting at sheet-nr. 10, you find tips and tricks on how to handle new clients...



1. click on "Clients" at the sidebar

2. click on button "NEW USER" opens the edit page for a new client

The screenshot shows the SNS application interface. On the left sidebar, the 'Users' menu is expanded, and 'Clients' is selected. The main content area displays a 'Users' management page with a search bar and filter options. A table lists various users with their usernames and associated actions (edit and delete). A 'NEW USER' button is highlighted in the top right corner of the main area.

USERNAME	GROUPS	ACTIONS
a3		
aas_patient_1		
ag15h		
AJ		
Alana		
Amqtpi		
Analyse_CB		
Analyse_TP		
Audit_Operations		
ba88i		

Create a new user

GENERAL SCHEDULES TRAFFIC LIGHTS

PROFILE

3. Username: MM0815XX|

4. Password: Click here to provide a new password

Repeat password: Repeat the new password

Client must change the password in the next login

Name: First name Last name

Email:

Gender: Male Female

Language: Deutsch Englisch

Phone:

Groups: Gruppen:

User(s) to whom this therapist should be allowed to have access: Auswählen Wahl aufheben

a3
aaskollege
aas_patient_1
aastest
aastest_english

the first page of the new client shows the tab "GENERAL" information

mandatory fields:

3. add user-/client-name (usually anonymous)

4. define first login-password

facultative fields:

- name and surname
- E-mail address → this field defines the address to which automated notifications are send to
- gender
- choice of language (English or German)

- group: the new client can be added to a previously defined "GROUP".

→ groups can contain information and rights that will automatically be assigned to any member of this group. A clinic can e.g. chose to have a standardized collection of questionnaires for all clients in day-treatment. All new clients that become member of that group automatically receive all questionnaires that are scheduled for this group.

- grant access
- here, new clients can receive the rights to view other users within the system. E.g. in a setting of open team-coaching, one might want to allow clients to be able to see data of other team-members.

NOTE!!! This field DOES NOT grant access of a therapist to the new user! Any SNS-user with the rights of being a "therapist/coach" automatically has access to all new clients/users he/she creates. If a therapist wants another therapist to be able to access data of a new client, one has to edit the "grant access" field of that therapist (and drag the respective client to the right side).

For the new client to be able to start filling in questionnaires, one has to add “SCHEDULES”:

Create a new user

5. click the tab „SCHEDULES”

TITLE	QUESTIONNAIRE	FREQUENCY	ACTIONS
			6. ADD SCHEDULE

6. click on button „ADD SCHEDULE”

Create a new user

GENERAL SCHEDULES TRAFFIC LIGHTS

TITLE	QUESTIONNAIRE	FREQUENCY
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CREATE A NEW SCHEDULE

7. Questionnaire:

Schedule title:

8. Frequency:

Every workday

Every day(s)

Start:

End: Open end

Ends at

Ends after day(s)

Time slot start:

Time slot end:

Timezone:

Remember user per email:

9.

7. choose the applicable questionnaire

8. define the applicable frequency of questionnaire iterations:

- always (questionnaire remains active at all times)
- once (questionnaire can be filled only a single time)
- daily
- weekly

9. "SAVE" this schedule
(NOTE!!! this only saves the new schedule, not the complete new client)

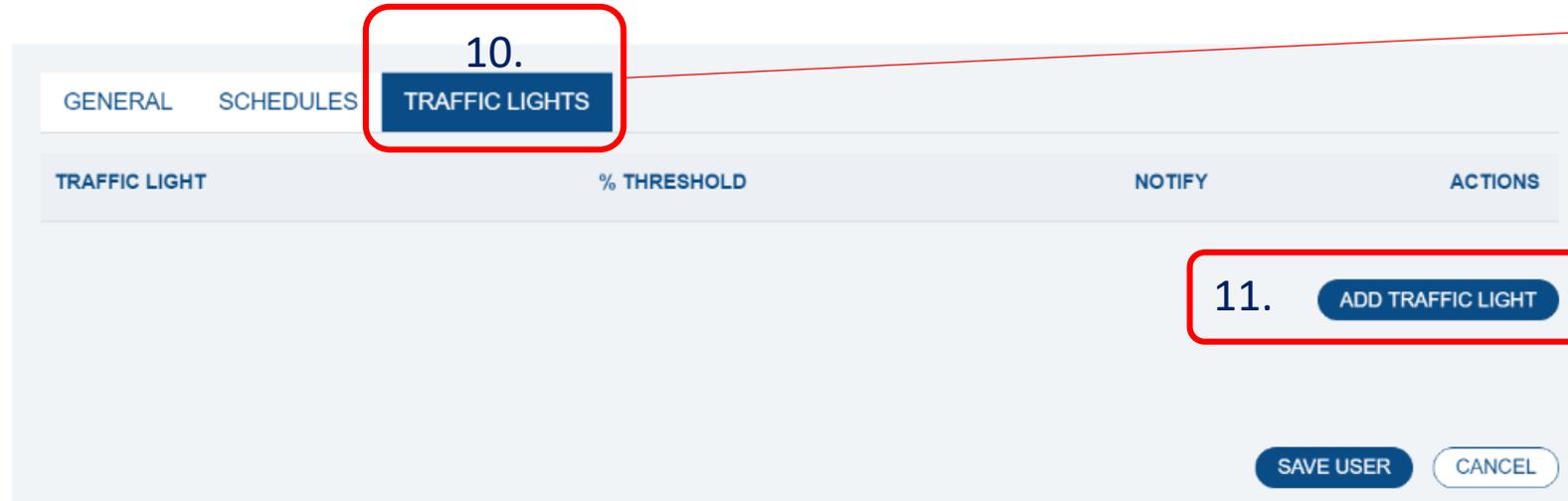
extra fields, if daily rhythm is chosen:

- only weekdays (no weekends)
- every ... day (e.g. every second day)
- starting date of the schedule
- open end or end date of the schedule
- time, when questionnaires becomes active
- time, when questionnaire is moved to "missed" (and remains active)
- time zone
- if box is checked, an automatic e-mail reminder is send to the new client's e-mail address (see tab "GENERAL"), each day when the questionnaire becomes active

The third tab allows you to add “TRAFFIC LIGHTS”

NOTE!!! Please apply TRAFFIC LIGHTS only after consulting the separate chapter on #create_traffic_lights, because these have special underlying algorithms that need to be understood for correct use !!!

Create a new user



The screenshot shows the 'Create a new user' interface. At the top, there are three tabs: 'GENERAL', 'SCHEDULES', and 'TRAFFIC LIGHTS'. The 'TRAFFIC LIGHTS' tab is selected and highlighted with a red box labeled '10.'. Below the tabs is a table with columns: 'TRAFFIC LIGHT', '% THRESHOLD', 'NOTIFY', and 'ACTIONS'. Below the table is a blue button labeled 'ADD TRAFFIC LIGHT', which is highlighted with a red box labeled '11.'. At the bottom of the form are two buttons: 'SAVE USER' and 'CANCEL'.

10. Click on tab “TRAFFIC LIGHT”

11.

ADD TRAFFIC LIGHT

11. Click on button “ADD TRAFFIC LIGHT”

Further information:

For all new questionnaires, traffic lights need to be created first. Only for the German version of TPQ and TPQ-TK, pre-installed traffic lights are available. Please consult the chapter #create_traffic_lights for an introduction on how to install a traffic light yourself or contact us directly under benjamin.aas@ccsys.de

Create a new user

GENERAL SCHEDULES **TRAFFIC LIGHTS**

TRAFFIC LIGHT	% THRESHOLD	NOTIFY	ACTIONS
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ASSIGN TRAFFIC LIGHTS ✕

Traffic Light: 12.

13. Notify client per email, when threshold is reached
 Notify therapist per email, when threshold is reached
 Notify other users per email, when threshold is reached

% Threshold: 14.

Window width: 15.

16.

12. Choose traffic light (here TPB_TK)

13. Send automatic e-mails to respective users (client, therapist, other users) when threshold is crossed

14. Define threshold (% of maximum)

15. Define window width for calculation of a traffic light score

16. "SAVE TRAFFIC LIGHT"

17. "SAVE USER", after having edited all information, schedules and traffic lights

Create a new user

GENERAL SCHEDULES **TRAFFIC LIGHTS**

TRAFFIC LIGHT	% THRESHOLD	NOTIFY	ACTIONS
Stabilitaet (gP1)	75		

ADD TRAFFIC LIGHT

17. **SAVE USER** CANCEL

You can find a list of clients in the sidebar under “USERS” and “CLIENTS”

You can use the search field for finding clients (activates while typing)

Users

Overview
Diagrams
Users
Clients
Therapists
Admins
Archive
Groups
My questionnaires
Administration

mm|

NEW USER

Active users Inactive users All users

USERNAME	GROUPS	ACTIONS
kr131m		
kr163m		
Marlene		
Marlene_Klient1		
Meg		
Mimi		
MM0815XX		
moomoo		
mk		
Participant1		

1 2 3 4 5 6 7 8 9 10

Click on the user-name shows information of that user

- Overview
- Diagrams
- Users
- Clients**
- Therapists
- Admins
- Archive
- Groups
- My questionnaires
- Administration

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DEACTIVATE ARCHIVE THIS PERSON EDIT THIS PERSON

INFORMATION

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aas@gmail.com

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TRAFFIC LIGHTS

TRAFFIC LIGHT HISTORY CURRENT

TPB_TK_Veränderungsmotivation (gP4)

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COMMENT

INSERT COMMENT

- “DEACTIVATE” user (pauses all schedules)
- “ARCHIVE” user (save data and makes user inaccessible)
- “EDIT” user (to change information, add schedule,...)

General information on the client

Current traffic light score

Activated schedules/questionnaires

upload documents
(scans, homework-assignments, diagnostic data,...)

Add a commentary, note, next meeting etc.



List of all clients

Overview

Diagrams

Users

Clients

Therapists

Admins

Archive

Groups

My questionnaires

Administration

Users

Type a user's name ...

NEW USER

Active users Inactive users All users

USERNAME	GROUPS	ACTIONS
a3		
aas_patient_1		
ag15h		
AJ		
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Amqtpi		
Analyse_CB		
Analyse_TP		
Audit_Operations		
ba88i		

< 1 2 3 4 5 6 7 8 9 10 >

Inactive users appear grey

Click on the pen opens editing of client directly (see page 3)

Click on the “trash bin” archives the user:

- all schedules and data are being transferred to the archive
- the user cannot enter SNS anymore
- all data become inaccessible to therapists until re-activating the user

Users

Type a user's name ...

NEW USER

Active users Inactive users All users

USERNAME	GROUPS	ACTIONS
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Audit_Operations		
ba88i		

1 2 3 4 5 6 7 8 9 10

Feedback

If you come across problems when creating a new client or if the presentation has flaws, misses information or you have suggestions, please do not hesitate to contact us.

SNS is a work in progress and we (and you!) benefit from all feedback we receive. Just contact the support under:

benjamin.aas@ccsys.de

Thank you very much!