



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 interface for managing users. The sidebar on the left has a 'Users' section with a dropdown menu. The 'Clients' option is highlighted with a red box and the number '1.'. The main content area is titled 'Users' and includes a search bar, radio buttons for 'Active users', 'Inactive users', and 'All users', and a table of users. The table has columns for 'USERNAME', 'GROUPS', and 'ACTIONS'. The 'ACTIONS' column contains edit and delete icons for each user. In the top right corner, a 'NEW USER' button is highlighted with a red box and the number '2.'. The top navigation bar shows the SNS logo and the user 'aatest\_english'.

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”

The screenshot shows the 'Create a new user' interface. At the top, there are three tabs: 'GENERAL', 'SCHEDULES', and 'TRAFFIC LIGHTS'. The 'SCHEDULES' tab is highlighted with a red box and labeled '5.'. Below the tabs is a table with the following columns: 'TITLE', 'QUESTIONNAIRE', 'FREQUENCY', and 'ACTIONS'. At the bottom right of the table, there is a blue button labeled 'ADD SCHEDULE', which is also highlighted with a red box and labeled '6.'.

6. click on button „ADD SCHEDULE”

# Create a new user

GENERAL SCHEDULES TRAFFIC LIGHTS

TITLE	QUESTIONNAIRE	FREQUENCY
-------	---------------	-----------

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 highlighted with a red box and 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 and 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](mailto:benjamin.aas@ccsys.de)***

## Create a new user

GENERAL SCHEDULES **TRAFFIC LIGHTS**

TRAFFIC LIGHT	% THRESHOLD	NOTIFY	ACTIONS
---------------	-------------	--------	---------

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

MM0815XX

DEACTIVATE ARCHIVE THIS PERSON EDIT THIS PERSON

## INFORMATION

Contact: No phone provided  
aas@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
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## DOCUMENTS

Dokument hochladen:  Keine ausgewählt

## 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		
Alana		
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
a3		
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ag15h		
AJ		
Alana		
Amqtpi		
Analyse_CB		
Analyse_TP		
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](mailto:benjamin.aas@ccsys.de)**

**Thank you very much!**