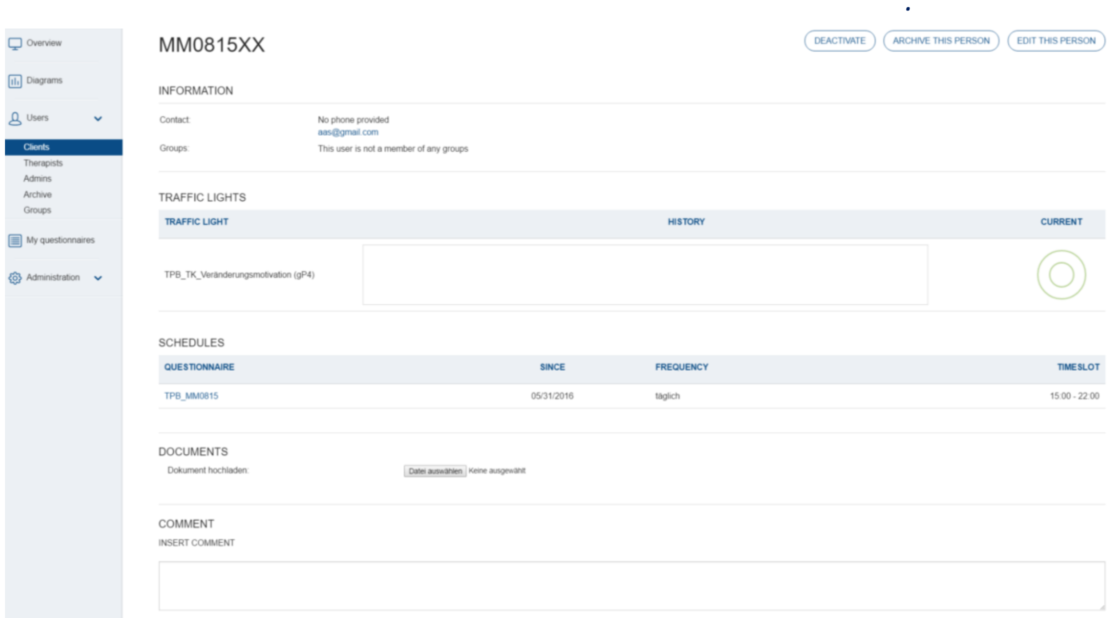



# #create_new_client

*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*

sheet-nr.

*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

3 → 4 → 5 → 6 → *sheet-nr.*

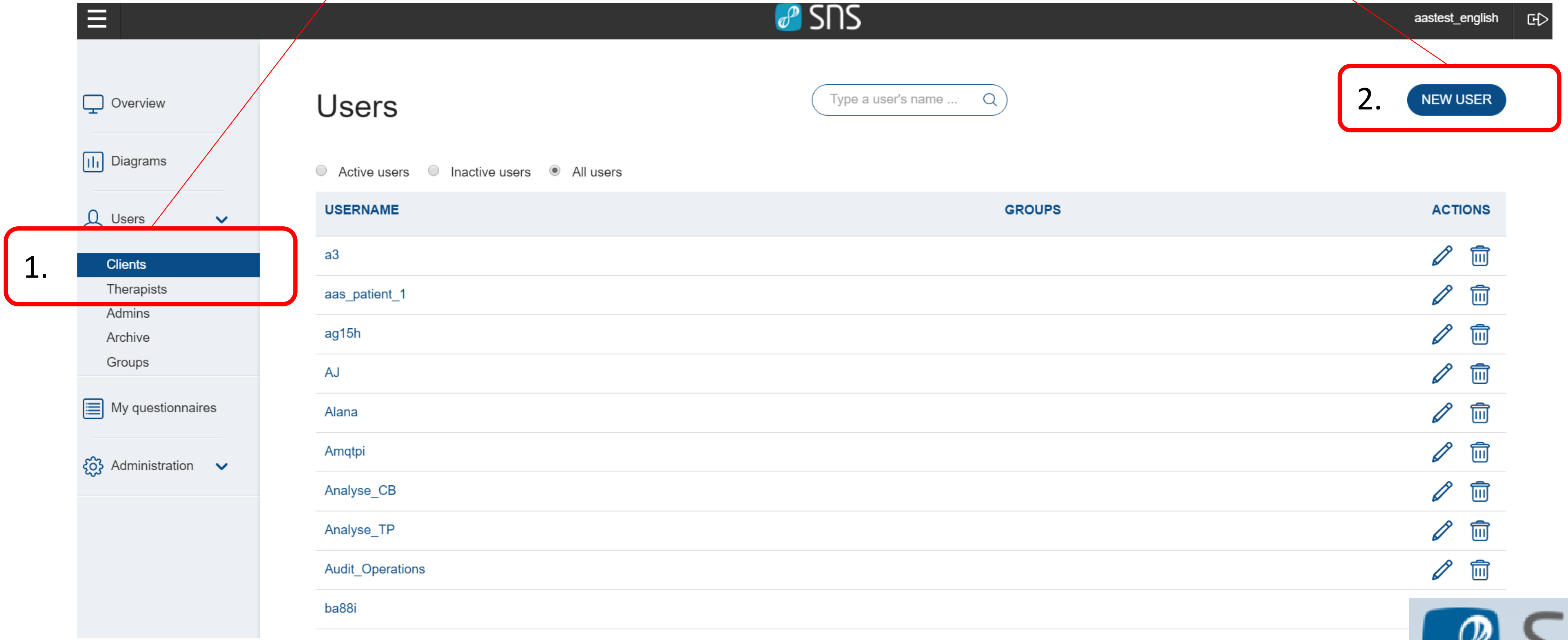
10. Click on tab "TRAFFIC LIGHT"
11. Click on button "ADD TRAFFIC LIGHT"
12. Choose traffic light (here TPB_TK)
13. Send automatic e-mails to respective users when threshold is crossed
14. Define threshold (% of maximum)
15. Define window width for calculation of a traffic light score
16. "SAVE TRAFFIC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

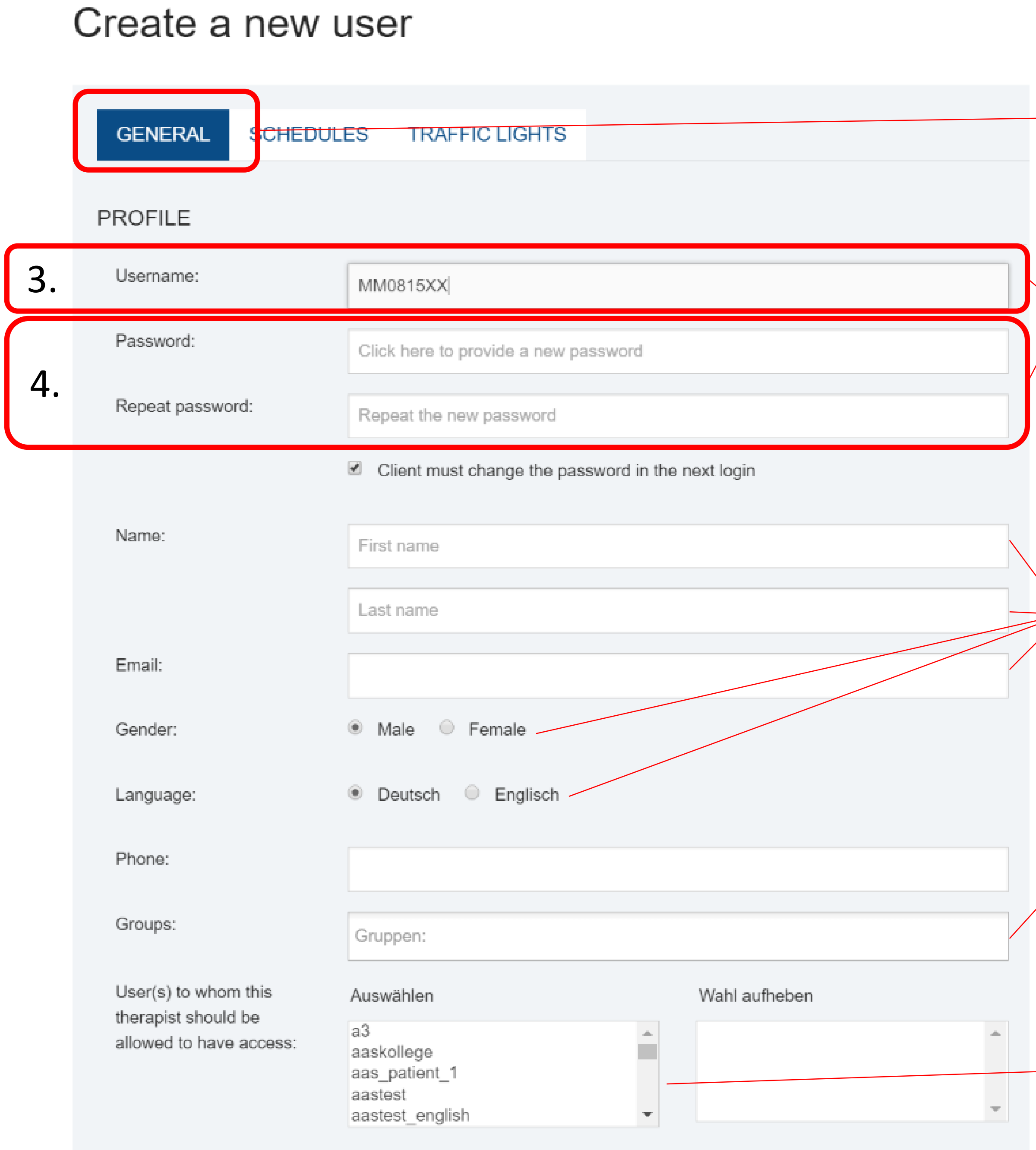
7 → 8 → *sheet-nr.* → 9 → …

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 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.

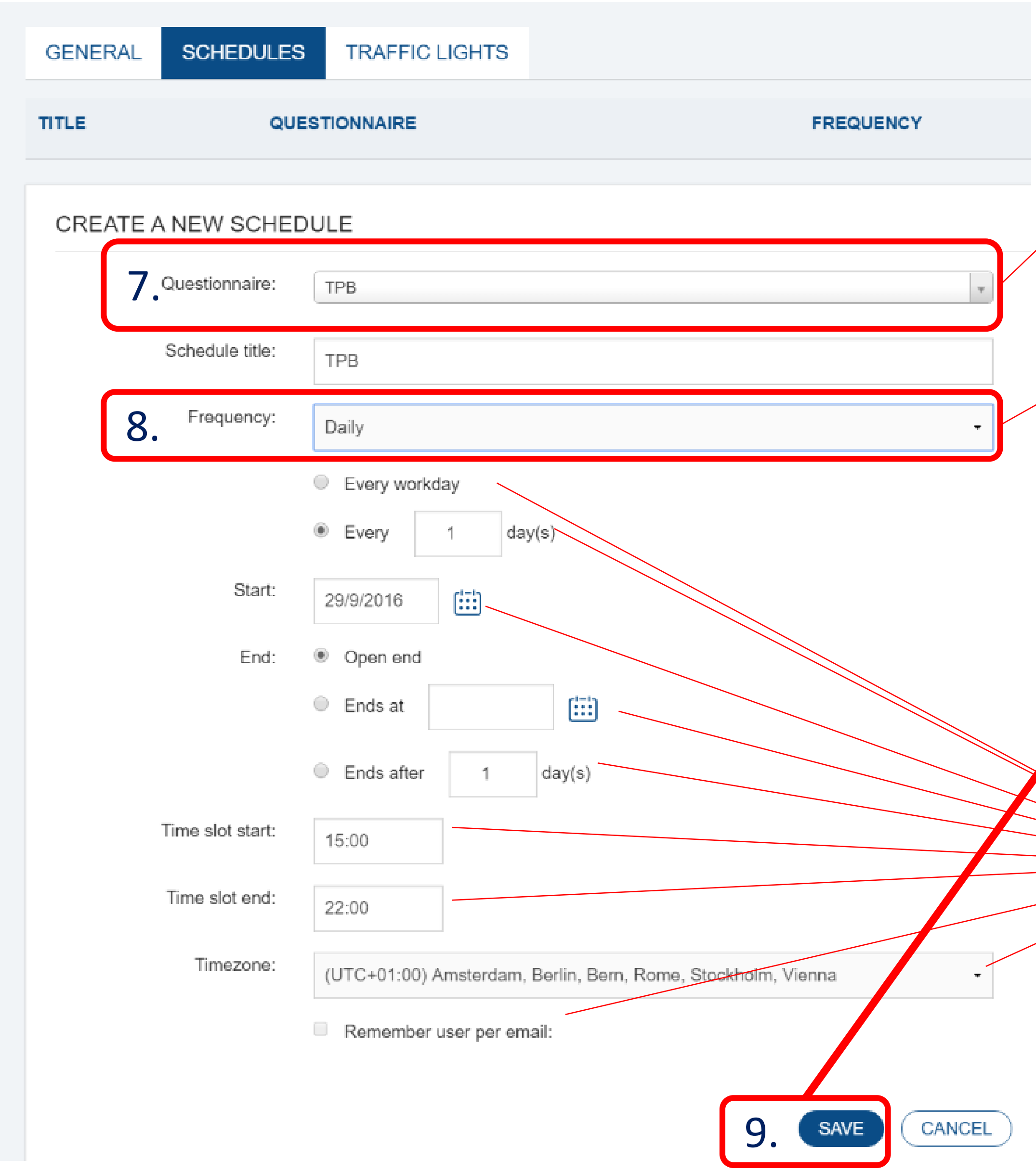
NOTE!!! This field DOES NOT grant access of a therapist to the new user! Any SNS-user with the rights of being a "therapist/coach" automatically has access to all new clients/users he/she creates. If a therapist wants another therapist to be able to access data of a new client, one has to edit the "grant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

**5. click the tab „SCHEDULES"**


**6. click on button „ADD SCHEDULE"**

# Create a new user




## 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

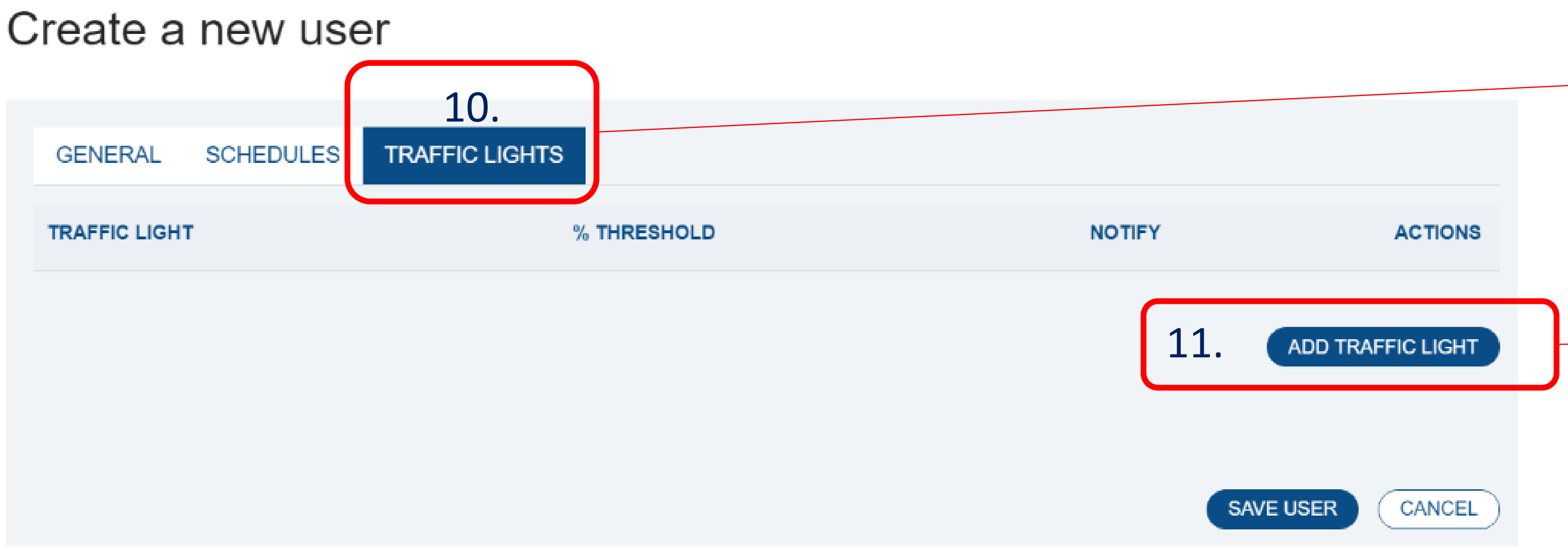
**(NOTE!!! this only saves the new schedule, not the complete new client)**

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 !!!***

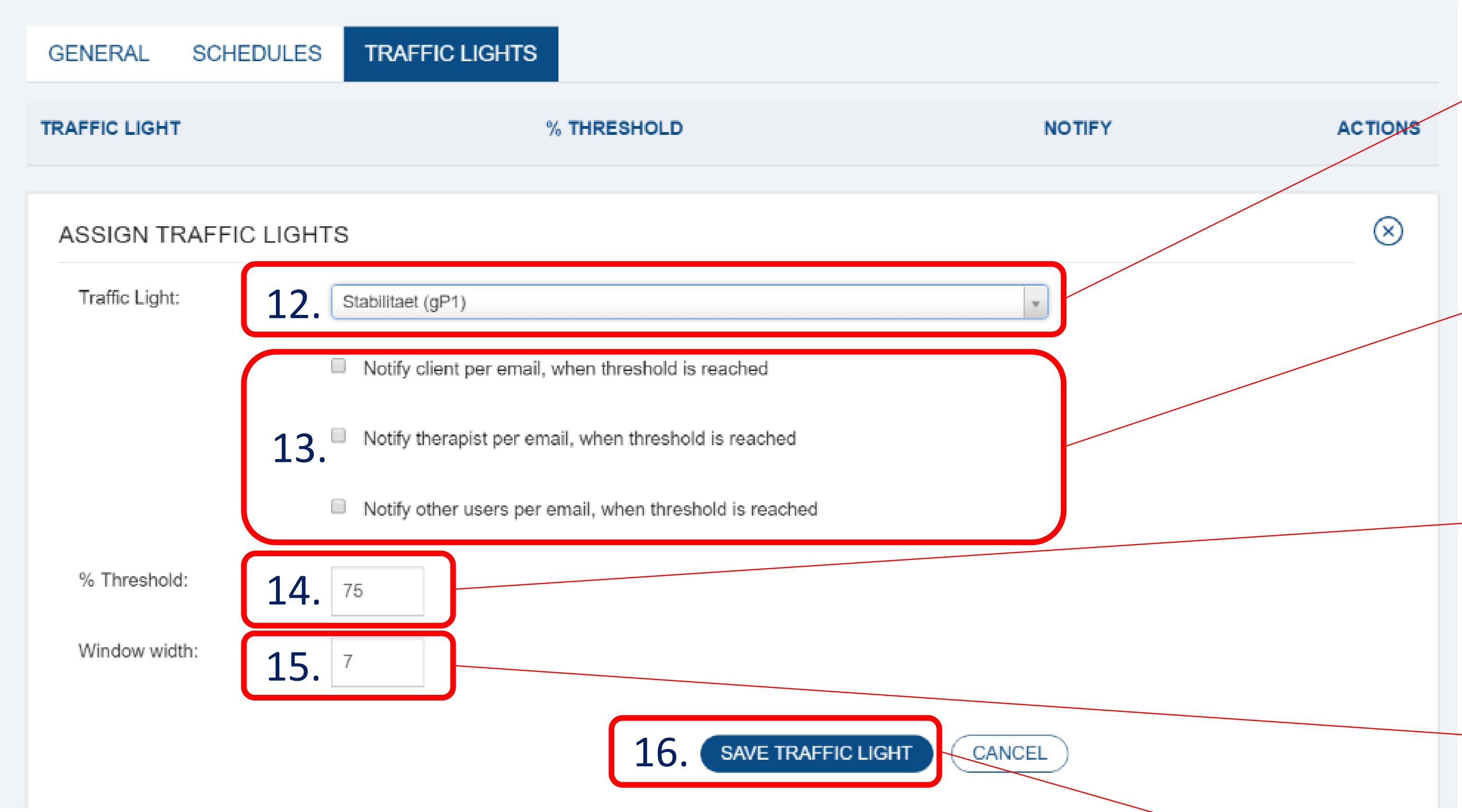



**10. Click on tab "TRAFFIC LIGHT"**

**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




**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”**

SNS

**17. “SAVE USER”, after having edited all information, schedules and traffic lights**

## Create a new user

GENERAL SCHEDULES TRAFFIC LIGHTS

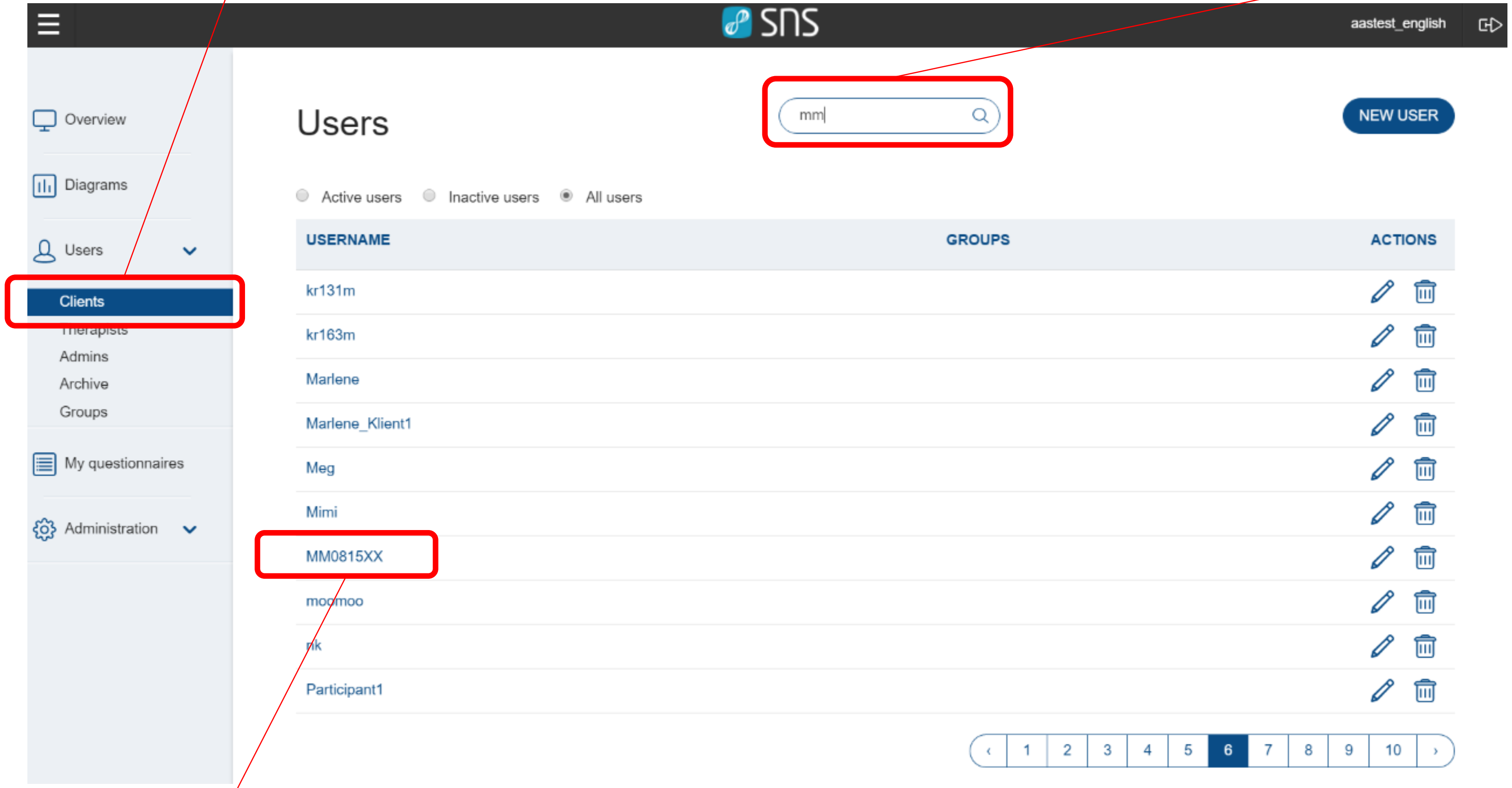
| TRAFFIC LIGHT | % THRESHOLD | NOTIFY | ACTIONS |
|---|---|---|---|
| Stabilitaet (gP1) | 75 | | |

ADD TRAFFIC LIGHT

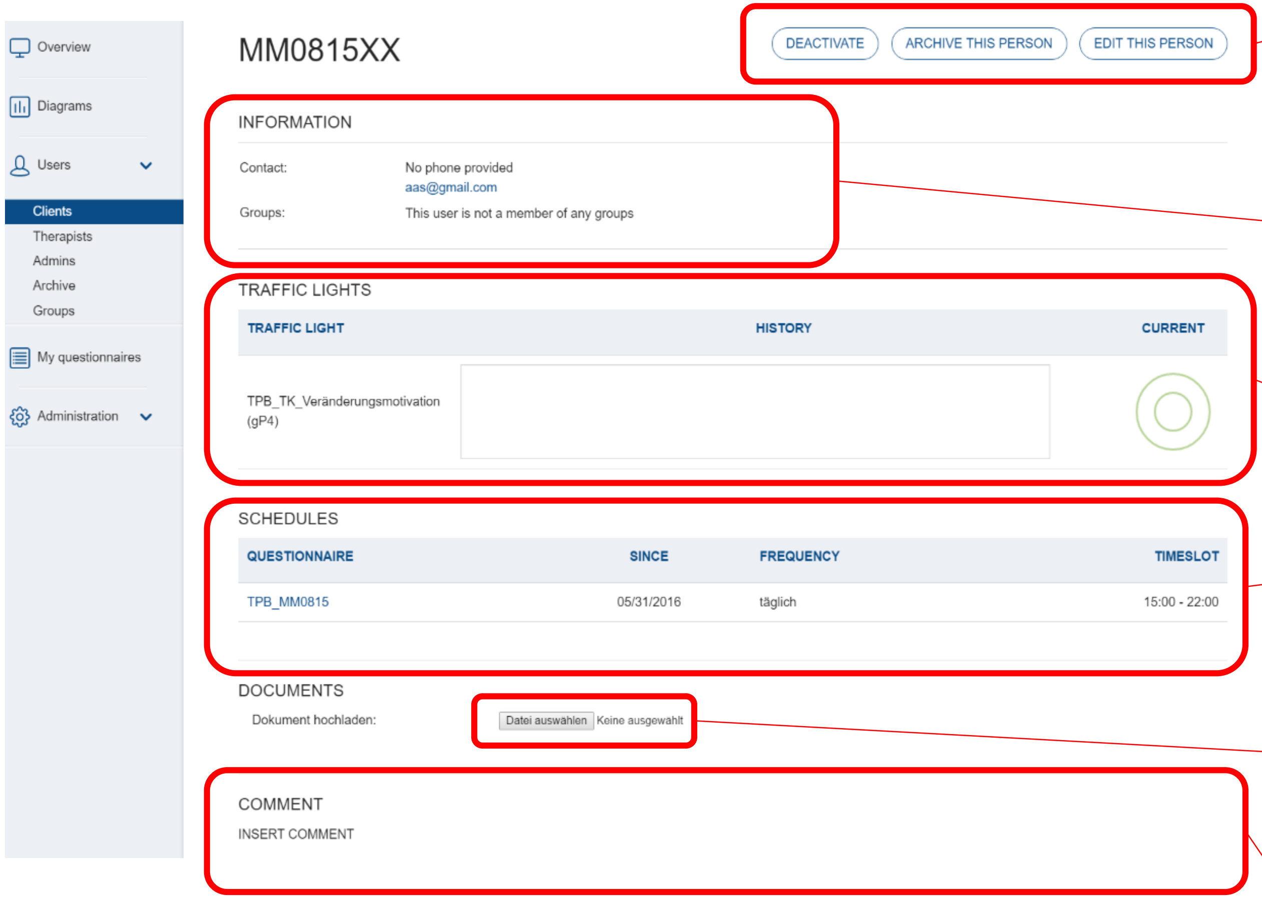
17. SAVE USER CANCEL

**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)**




**Click on the user-name shows information of that user**




- "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**

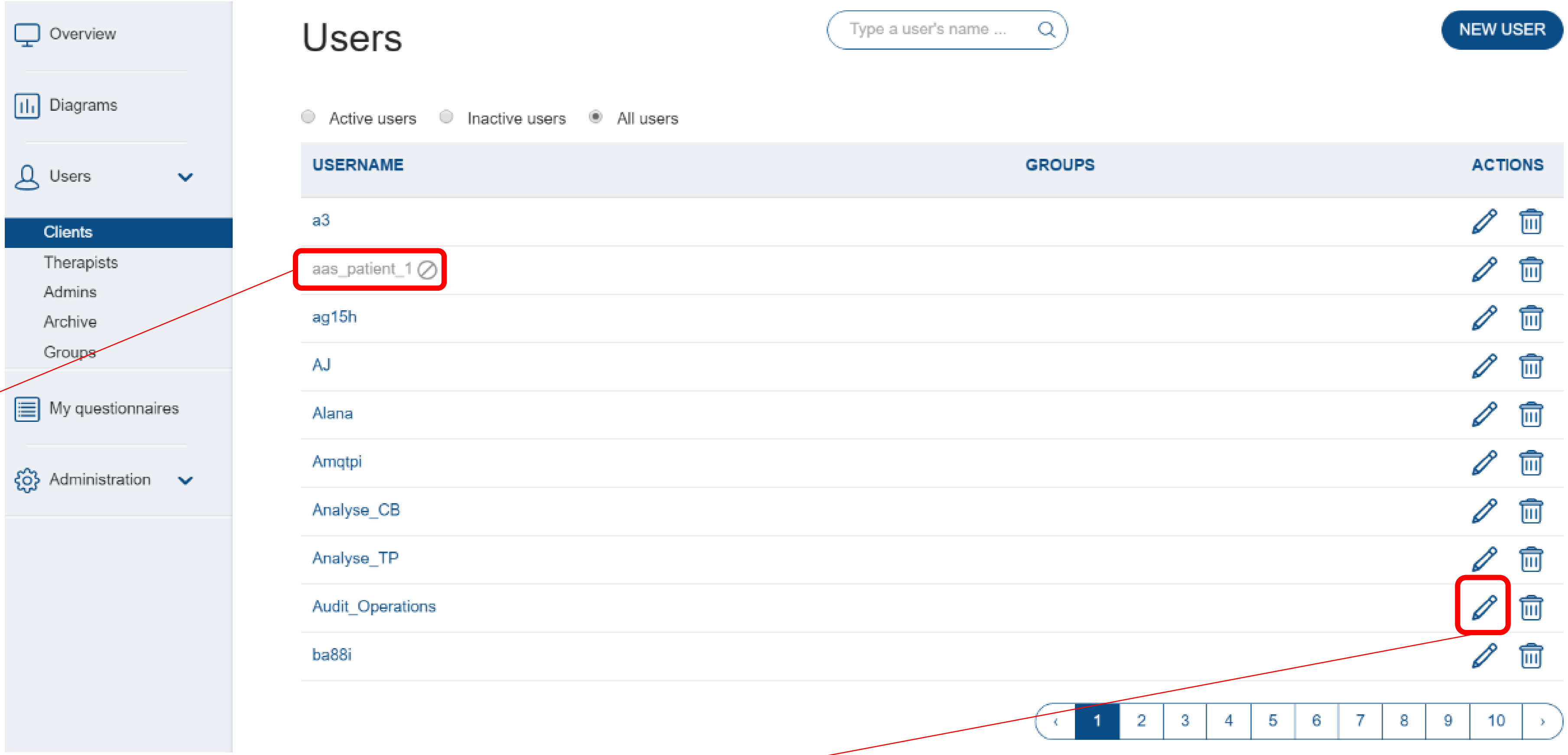
**Current traffic light score**

**Activated schedules/questionnaires**

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

**Add a commentary, note, next meeting etc.**

# List of all clients

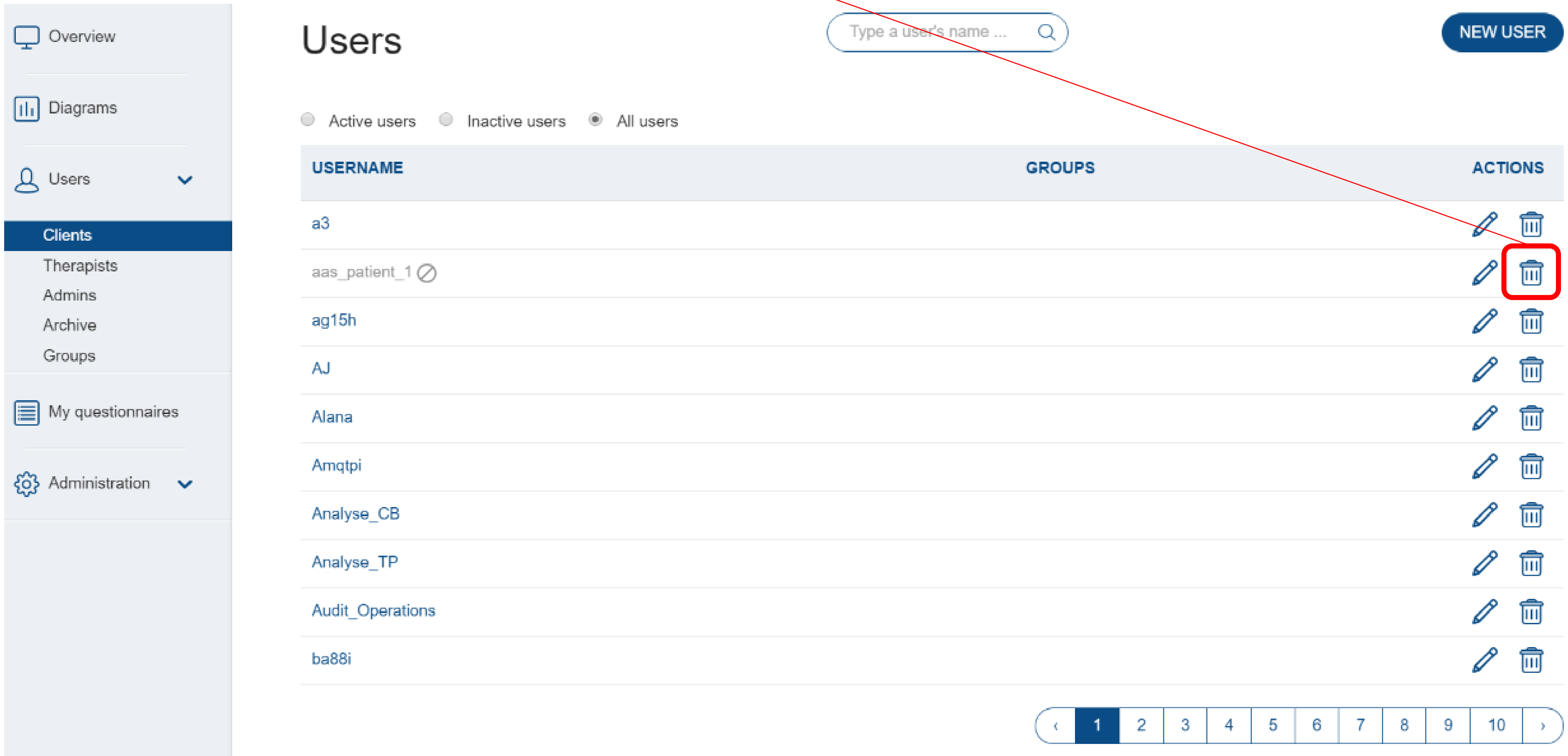



**Inactive users appear grey**

**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**



# 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!**