User's Guide

OmbudsManager™

1.3.2

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Introduction

Welcome! OmbudsManager™ Case Management and Tracking system is an important piece of Synergy's integrated suite of social service software products.

OmbudsManager provides powerful case management automation and is fully integrated with Synergy's client and case management software systems.

The topics found in this documentation are meant to give you important information regarding OmbudsManager along with step-by-step procedures. *Getting Started (on page 7)* contains a general overview of using OmbudsManager. Information about data entry and day-to-day tasks can be found in *Using OmbudsManager* (on page 19). If you need to setup OmbudsManager after an install or do other administrative tasks, you will want to read parts of *Administering OmbudsManager* (on page 95).

Typographical Conventions

Before you start using this guide, it is important to understand the terms and typographical conventions used in the documentation.

For more information on specialized terms used in the documentation, see the Glossary at the end of this document.

The following kinds of formatting in the text identify special information.

Formatting convention	Type of Information
Triangular Bullet (➢)	Step-by-step procedures. You can follow these instructions to complete a specific task.
Special Bold	Items you must select, such as menu options, command buttons, or items in a list.
Emphasis	Use to emphasize the importance of a point or for variable expressions such as parameters.
CAPITALS	Names of keys on the keyboard. For example, SHIFT, CTRL, or ALT.

Formatting convention	Type of Information
KEY+KEY	Key combinations for which the user must press and hold down one key and then press another, for example, CTRL+P, or ALT+F4.

Getting Started

Welcome! We hope to make learning to use OmbudsManager as painless as possible. *Getting Started* shows you how to start and exit OmbudsManager, as well as how to change your password and customize the screen. If you are comfortable in general with Windows® then you may want to skip directly to ***Using OmbudsManager*** (on page 19), as much of the information in *Getting Started* will seem familiar to you. If you are not comfortable with Windows then use *Getting Started* to acquaint your self with the OmbudsManager work environment.

Starting OmbudsManager

After OmbudsManager has been successfully installed, a folder called *OmbudsManager* will appear under the Programs folder.

➢ ***To start OmbudsManager***

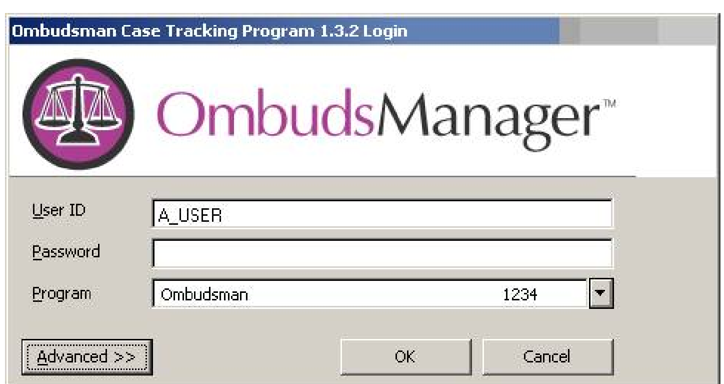
1 Click **Start** from the *Task Bar* in Windows®.

2 Select **Programs**, and then the folder called **OmbudsManager**.

-OR- In Windows XP, Select **All Programs** and then the folder called **OmbudsManager**.

3 Select the **OmbudsManager** icon.

4 When prompted, enter in the *User ID* (username) and *Password*. Ask your System Administrator if you do not know your user ID and password.



5 Select a new *Program* if necessary. Otherwise, leave the default shown.

6 Click **OK**.

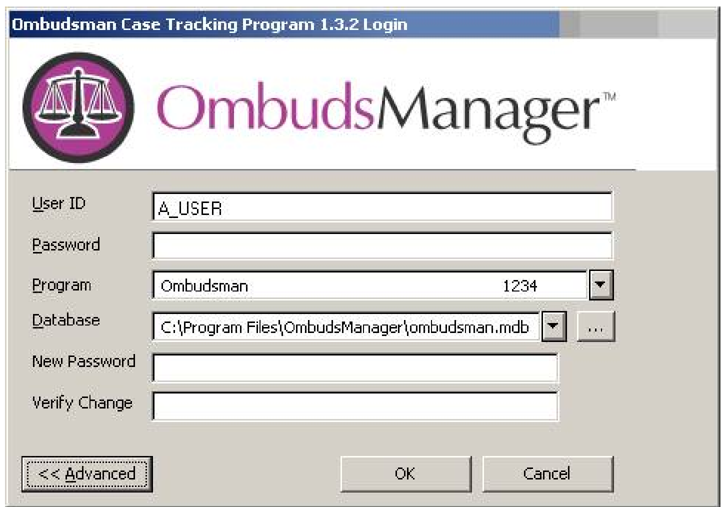
Using a Different Database

You or your organization may need to keep more than one OmbudsManager database file. Use this procedure to log into a database other than the default.

➢ *To log into a different database*

1 ***Start OmbudsManager*** (see "Starting OmbudsManager" on page 7).

2 At the *Login* screen, enter your current *User ID* (username) and *Password*.



3 Click the **Advanced>>** button to display the *Database*, *New Password*, and *Verify Change* fields.

4 Use the *Database* pull down to select a different database file. Click on the **Browse (...)** button if you do not see the file you need. Navigate to the correct file, highlight it, and click **Open**.

5 Click **OK** to log into the database.

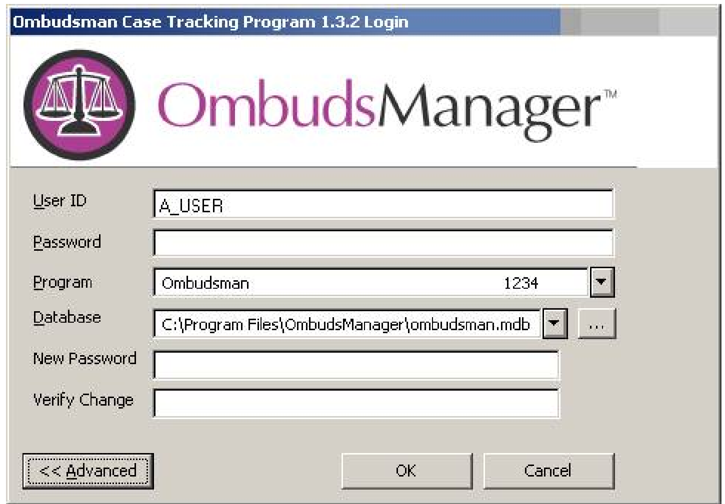
Changing Your Password

Each individual user can change their own password when logging in. If someone has forgotten their password, a username with access to the Staff/Users area in System Admin can reset their password. See ***Resetting User Passwords*** (on page 103) for more information.

➢ *To change a username's password*

1 ***Start OmbudsManager*** (see "Starting OmbudsManager" on page 7).

2 At the *Login* screen, enter your current *User ID* (username) and *Password*.



3 Click the **Advanced>>** button to display the *Database*, *New Password*, and *Verify Change* fields.

4 Enter the new password in *New Password* and then retype it in *Verify Change*.

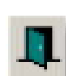
5 Click **OK** when finished.

Exiting OmbudsManager

➢ ***To exit from OmbudsManager***

1 From the **File** menu, choose **Exit**.

-------------------------------- OR ----------------------------------

1 Click the **Exit** icon  on the toolbar.

-------------------------------- OR ----------------------------------

1 ALT+F4

Using the Keyboard

OmbudsManager offers keyboard access to important functions and screens. Using the mouse will help you initially learn the program, but for fastest data entry, use the keyboard as much as possible.

Moving Between Fields

The TAB key moves you to the next field. SHIFT+TAB moves you to the previous field.

Typing in a Pull Down Menu

Many OmbudsManager fields, such as *Town* and *State*, contain pull down menus. Type in the first few letters of an item once you reach the pull down menu. The program will jump down to the appropriate section of the list.

Accelerator Keys

All menus and option buttons in OmbudsManager have labels with one letter underlined. If the ALT key is pressed in combination with the underlined letter, the effect is the same as clicking on the menu or button with the mouse. For example, the **File** menu can be opened by holding down the ALT key while typing an "F." Use ESC for the Cancel and Close buttons.

Shortcut Keys

Some frequently used menu options have shortcut keys, which are displayed to the right of the option. These shortcut keys can be used to access a function without having to open a menu. For instance, under the **File** menu, the **Print** option shows the shortcut key "CTRL+P." To use print, hold down the CTRL key while pressing "P."

Table of Shortcut Keys

Access Program Area	Key
Activities (Program Activities)	F5
Cases	F2
Complainants	F9
Facilities	F7
Facility Owners	F11
Perpetrators	F10

Program Activities	F5
Referrals	F3
Reports	F6
Residents	F8
Tasks/Pending Tasks	F4

Create New	Key Combination
Activities (Program Activities)	CTRL+O
Case	CTRL+N
Complainants	CTRL+I
Facility	CTRL+J
Program Activity	CTRL+O
Referral	CTRL+R
Resident	CTRL+L

Edit Highlighted Record	Key Combination
Activity (Program Activity)	CTRL+F5
Case	CTRL+F2
Complainant	CTRL+F9
Facility	CTRL+F7
Facility Owner	CTRL+F11
Perpetrator	CTRL+F10
Program Activity	CTRL+F5
Referral	CTRL+F3
Resident	CTRL+F8
Task/Pending Task	CTRL+F4

Miscellaneous	Key Combination
Contact History (activities access in Facilities area)	CTRL+H
Exit the Program	ALT+F4

OmbudsManager's Work Screens

OmbudsManager's Work Screens describe the program's work environment. In addition, you can learn how to use and customize the *List Screens* found throughout the program.

Menus

OmbudsManager menus are located directly below the *OmbudsManager* title bar. These menus give you access to program functions and data. These menus, **File**, **View**, **System,** and **Help** will be referred to throughout the documentation. Other menus, such as *Cases*, *Facilities*, *Residents*, *Complainants*, *Perpetrators*, and *Owners,* appear as you access different areas of the program.

Toolbars

OmbudsManager contains many contextual *toolbars* that typically appear below the menu title bar. They allow you to easily perform functions without needing to use pull-down menus.

The toolbars that appear depend on the screen open in OmbudsManager. If you would like further clarification about an icon on a toolbar, hover your mouse over the icon. After a few seconds, a label will appear that may have more information about the function of the icon.

Panes and Splitter Bars

Panes and Subpanes

Panes are regions inside a work screen that you can resize. OmbudsManager typically displays two panes - a *Navigation Pane* and *Work Pane*.

When you access an area of OmbudsManager, the *Navigation Pane* displays on the left hand side. The *Navigation* pane allows you to access additional information or data entry screens. Typically, the *Navigation* pane displays up and down arrows to allow you to scroll through more choices.

The *Work Pane* displays the area you have accessed in OmbudsManager. The *Work* pane may divide into additional subpanes depending on the context.

You can make any pane smaller or wider using splitter bars.

Splitter bars

The OmbudsManager screen has a vertical grey line or *splitter bar* dividing the screen into the *Navigation* and *Work* panes. Moving the mouse over this bar causes the mouse cursor to turn into a double arrow. While the double arrow is visible, clicking on the mouse button and holding the button down can "drag" the splitter bar left and right as the mouse is moved.

List Screens

The *Work* pane displays *cases* and other types of records in lists or *List Screens*. *List Screens,* also known as grids*,* contain several records in a list, similar to a spreadsheet. Each row contains one record. Columns divide each row, listing key information about each record. To see the details of a record, double click on the row of the entry.

Filtering List Screens

The *Cases* and *Facilities* list screens in OmbudsManager allow you to apply filters. A *Filter* forces the list screen to display only records that match conditions that you have set.

Sorting Information

List screens also allow you to sort information. You can sort information by the column headings. Click once on the appropriate column heading. The data will sort itself by the data that appears in the column. It will sort by ascending order by default. Click one more time on the same column heading to sort the information in descending order. You can't sort on every column, but you can sort on most of the columns.

Customizing List Screens

You can set the colors and font of list screens. ***Changing List Screen Colors and Fonts*** (on page 16) has more details about changing colors from the default. OmbudsManager also gives you options to customize the columns of list screens - see ***Formatting Columns*** (on page 14) for more information.

Formatting Columns

OmbudsManager allows you to format the list screens that appear throughout the program. You can change the size and number of columns in view, the sort order of the data, and the order of the columns themselves.

➢ ***To adjust column widths***

1. Hover the mouse over the right border of a column heading.
2. When the pointer becomes a double-headed arrow, click and hold down the mouse button.
3. Drag the column border to the left or right.
4. Let go of the mouse button.

➢ ***To adjust the column to fit the column contents***

5. Double-click the right border of the column heading.

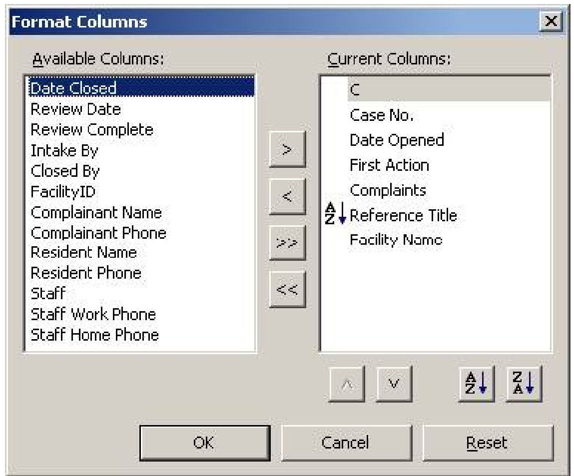
Add or Remove Columns from View

➢ ***To add or remove a column from a list screen***

1. In the list screen, right click (or left click with a left handed mouse).
2. In the menu that appears, select **Format Columns**.

-OR- From the **View** menu, choose **Current View**, then **Format Columns.**

3 In the *Format Columns* screen, highlight the column you wish to have appear in the *Available Columns* box. If you wish to remove columns from view, highlight one or more columns in the *Current Columns* box.



4 Click on the right arrow if you are adding a column. Click on the left arrow if you are removing a column. The double arrows will add (right) or remove (left) all columns.

5 Click **OK**.

Changing the Column Order

➢ *To change the column order as it appears in a list screen*

1 In a list screen, click on the title of a column you need to move. Hold the mouse button down.

2 Move the mouse left or right as needed. A grey line will appear, showing you where the column will appear.

3 Let go of the mouse button. The column should appear in the new location.

------------------------------ OR ------------------------------

1 In the list screen, click using the alternate mouse button (right-click.)

2 In the menu that appears, select **Format Columns**.

-OR- From the **View** menu, choose **Current View**, then **Format Columns.**

3 In the *Format Columns* screen, highlight the column you wish to move in the *Current Columns* box.

4 Click the **Up** or **Down** buttons as needed. The top of the list by default corresponds to the left side of the screen.

5 Click **OK**.

Changing List Screen Sort Order

You can easily change the order of the data that appears on a list screen.

➢ ***To change the sorting of a list screen***

1. Click once on the appropriate column heading. Ex: ID, Name. The data will sort itself by the data that appears in the column. It will sort in ascending order.
2. Click one more time on the same column heading to sort the information in descending order.

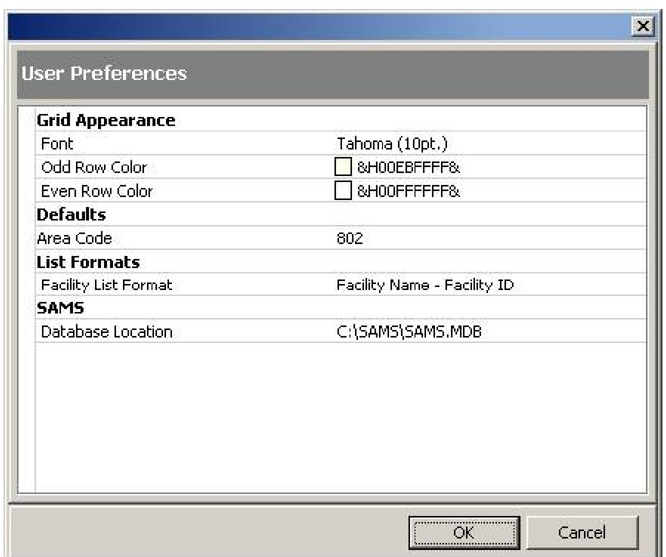
Changing List Screen Colors and Fonts

You can change the color and font displayed in OmbudsManager list screens. *Cases*, *Program Activities*, *Pending Tasks*, *Reports*, and many other areas contain list screens.

List screen fonts and colors are stored with the username you use to log into Windows. In a typical setup, this means that changing the font and colors will change the OmbudsManager settings just for your computer or just your Windows log on.

➢ ***To change the default list screen colors***

1. From the **System** menu, select **Preferences**.
2. To change a list screen font, highlight *Font* under the *Grid Appearance* heading.



3. Click on the **Browse (...)** button that appears.
4. Select a new font type, style, and size. Click **OK**.

5 To change list screen row colors, highlight *Odd Row Color* under *Grid Appearance*.

6 Click on the **Browse (...)** button that appears.

7 Highlight a new color and click **OK**.

8 Highlight *Even Row Color* under *Grid Appearance*.

9 Click on the **Browse (...)** button that appears.

10 Highlight a new color and click **OK**.

11 When finished, click **OK**.

Using OmbudsManager

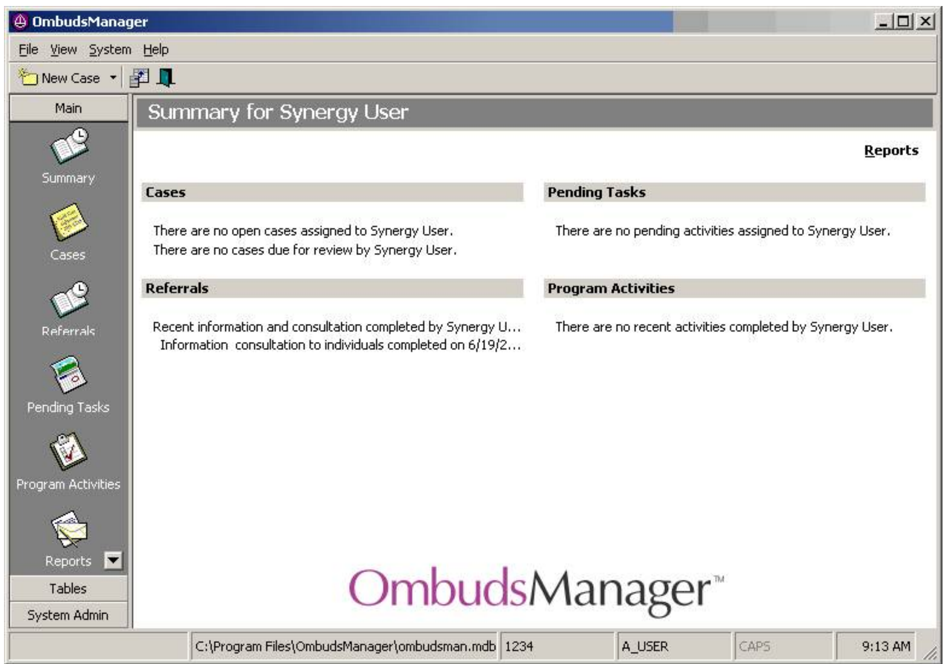
Using OmbudsManager describes how to use the two major subsystems of OmbudsManager: Cases and Activities. *Cases* allow you to enter and track all relevant information to a case, including individual complaints and the people involved. *Activities* manage ***referrals*** (see "Creating Referrals" on page 51) made to clients, contacts with facilities, and other current and upcoming work surrounding a case. The program divides activities into major categories: referrals, facilities contacts, and program activities. You can access all type of activities though the ***Program Activities*** (on page 57) screen.

The last section of *Using OmbudsManager* details how to run ***Reports*** (on page 63). OmbudsManager includes several reports that cover cases, activities, and facilities reporting and management.

User Summary

The *User Summary* screen highlights important case assignments and activity information for a user. OmbudsManager displays this screen when you first log into the program. You access the *User Summary* at any time by clicking **Summary** in the **Main** section of the *Navigation* pane.

The *User Summary* screen is organized under the following headings: *Cases*, *Referrals*, *Pending Tasks*, and *Program Activities*. You can see open assigned cases and cases for due for review under *Cases*. *Referrals* display consultations completed by the user. *Pending Tasks* shows a list of incomplete activities assigned to the user. The *Program Activities* heading lists recently completed activities.



All of the headings are hyperlinks, that is, they act like a link in a web page. After placing your mouse over the heading and clicking, OmbudsManager will bring you to the appropriate area of the OmbudsManager. You can also access reports by clicking on the *Reports* heading in the upper right hand corner.

The summary screen is read-only - you cannot enter information on this screen. Instead, use the *Navigation* pane to the left or the hyperlinks to access the data entry portions of the program.

Entering Cases

Case management is the core of OmbudsManager. The case data entry screen has many powerful functions, including the ability to record multiple ***complaints*** (on page 29), log ***journal entries*** (on page 35), and schedule case review dates. Through cases you can also create and edit the ***Facilities*** (on page 71), ***Resident*** (see "Residents" on page 85), and ***Complainant*** (see "Complainants" on page 89) files associated with each case.

Searching Cases

The *Cases* list screen in OmbudsManager can display a large number of records. Instead of scrolling through a long list, use *Find*. *Find* allows you to search for a type of record based on one or more criteria.

➢ ***To find a specific case record***

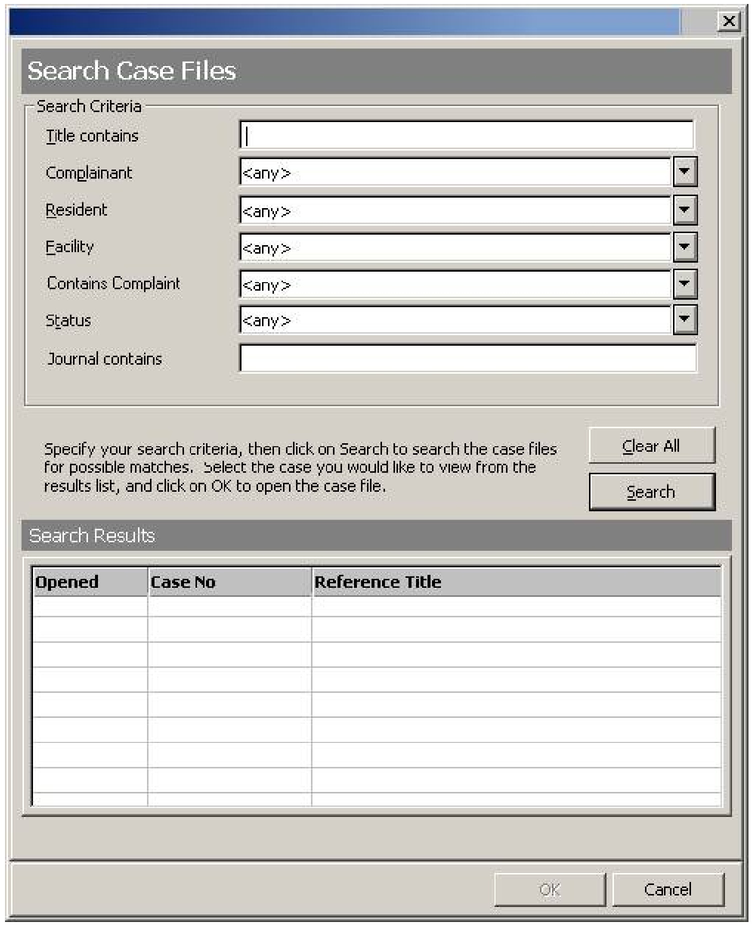
1. Click on the **Main** bar in the *Navigation* pane. Then click on **Cases**.

   -OR- From the **View** menu, select **Go To**, and then **Cases**. -OR- F2

2. Click **Find** on the toolbar.

   -OR- Select **Find Cases** from the **Cases** menu. -OR- CTRL-F

3. Use the pull down menus or enter information to search for a particular case. You can search in *Title (contains)*, *Complainant*, *Resident*, *Facility*, *Contains Complaint*, *Status*, and *Journal* entries. If you enter information into more than one field, OmbudsManager will search only for cases that meet *all* of the indicated criteria.



4. Click **Search**.
5. The list of cases meeting the criteria you set will appear below the *Search Results* title.
6. Double click a case file to open it or select the correct case file and click **OK**.

Filtering Cases

You filter or limit the case list screen by any combination of the following fields: *Case prefix list*, *Title like*, *Assigned to*, *Complainant*, *Resident*, *Facility*, *Facility District*, and/or *Facility Counties*.

If you need to remove an existing case list filter, click on **Filter** on the toolbar. Click **Clear All** and then **OK**.

➢ *To filter the case view*

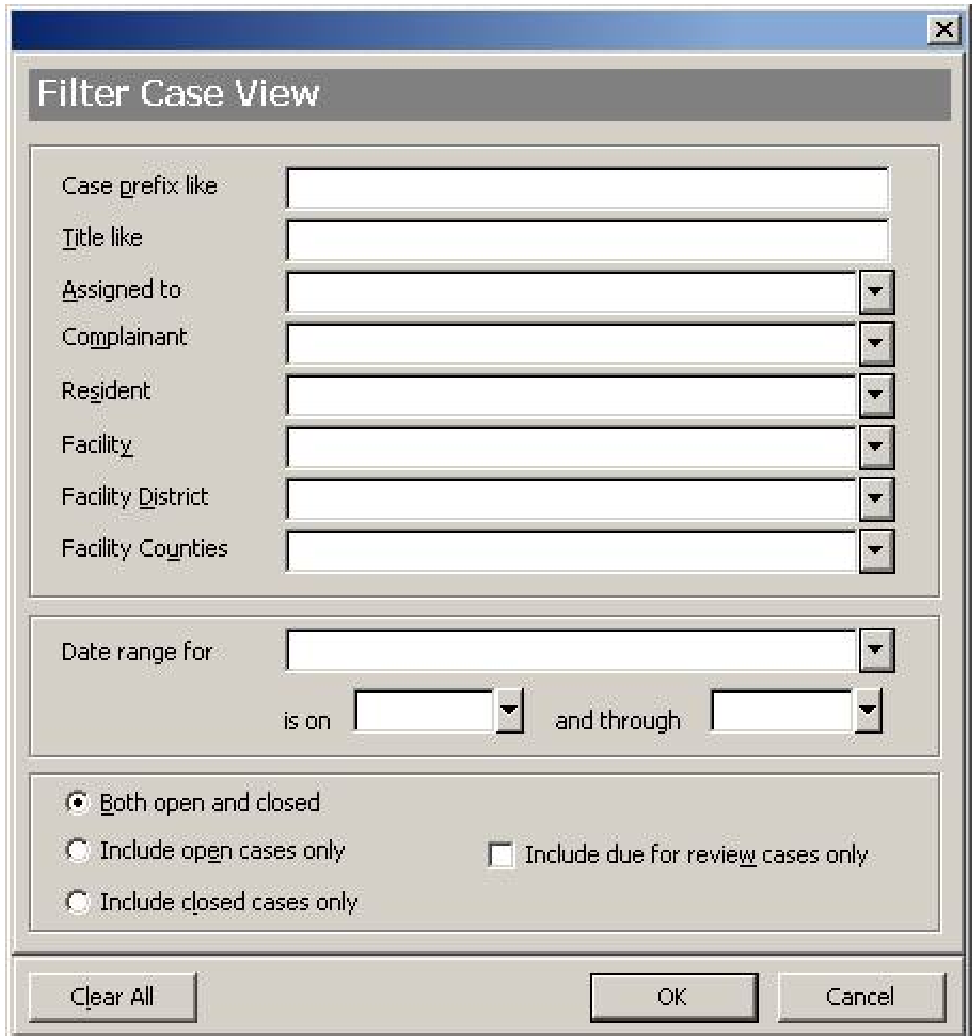
1. Click on the **Main** bar in the *Navigation* pane. Then click on **Cases**.

-OR- From the **View** menu, select **Go To**, and then **Cases**. -OR- F2

2 Click **Filter** on the toolbar.

-OR- Select **Filter** from the **Cases** menu.

3 Select the criteria you would like to filter on. If you enter more than one criteria, the filter will only select cases that meet all of the criteria. If you want to remove all criteria, click **Clear All**.



4 Click **OK**.

5 If no case files meet the filter criteria, you will be notified. Otherwise *Filter Case View* screen will close and the *Case* list screen will display only the case records that meet all the criteria you entered.

Creating a New Case

When you create a new case, OmbudsManager displays a *Case Quick Entry* screen where you enter important information. The screen does not reappear when you go back later to edit the case.

Most of the data entered on these screens comes from pull down menus. You can create new *Complainant*, *Facilities*, and *Residents* as needed right from the *Case Quick Entry* screen. Manage ***Complainant Roles*** (on page 125) and ***OmbudsMan/Staff*** (see "Adding New Usernames" on page 101) choices in the System Admin section of OmbudsManager.

Case numbering is assigned based upon the combination of the Case Prefix and the highest current Case Number for that prefix in the system. Check with your program manager before modifying the case prefix. Once a case is saved in the database, the case prefix and number cannot be modified.

➢ *To enter a new case*

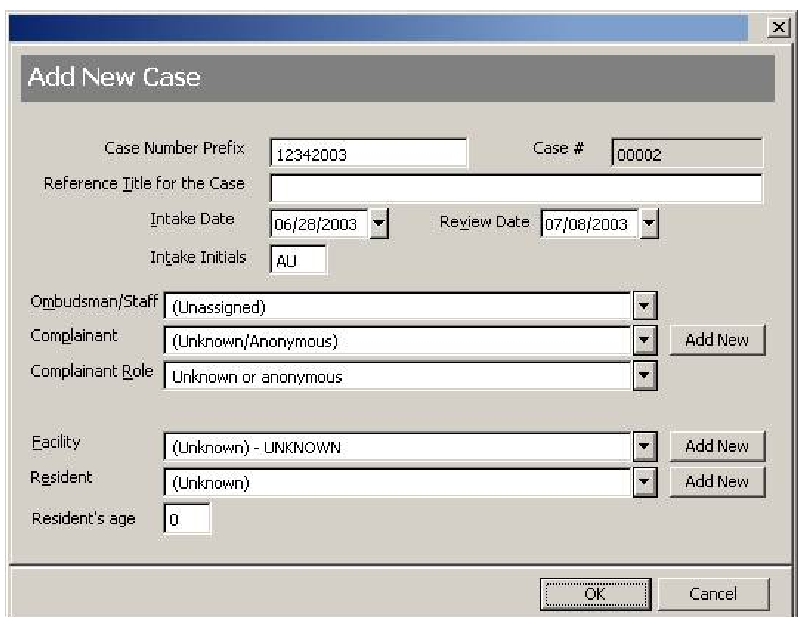
1 Click on the **Main** bar in the *Navigation* pane. Then click on **Cases**.

-OR- From the **View** menu, select **Go To**, and then **Cases**. -OR- F2

2 Click **New Case** on the toolbar.

-OR- Right click and select **New Case**. -OR- From the **Cases** menu, select **New Case**. -OR-CTRL+N

3 Check the *Case Number Prefix* and *Case #* as needed. OmbudsManager will combine the *Prefix* and the *Case #* to create the case number for the the record. The default case prefix is a combination of the *Program ID* and the current year. You can change this default case prefix at any time to fall in line with your current program's fiscal year and numbering system. Once a case is saved in the database, the case prefix and number cannot be modified.



4 Enter a *Reference Title for the Case*, *Intake Date*, *Intake Initials*, and *Review Date*.

5 Select an *Ombudsman/Staff* member to handle the case.

6 Select or enter a *Complainant* and select a *Complainant Role*. If the *Complainant* is not already in the database, click **Add New** to create a record for them.

7 Select a *Facility*. If the facility does not exist, click **Add New**.

8 Select a *Resident*. Click **Add New** if you can't find their record in the pull-down.

9 Enter the *Resident's age*, if known.

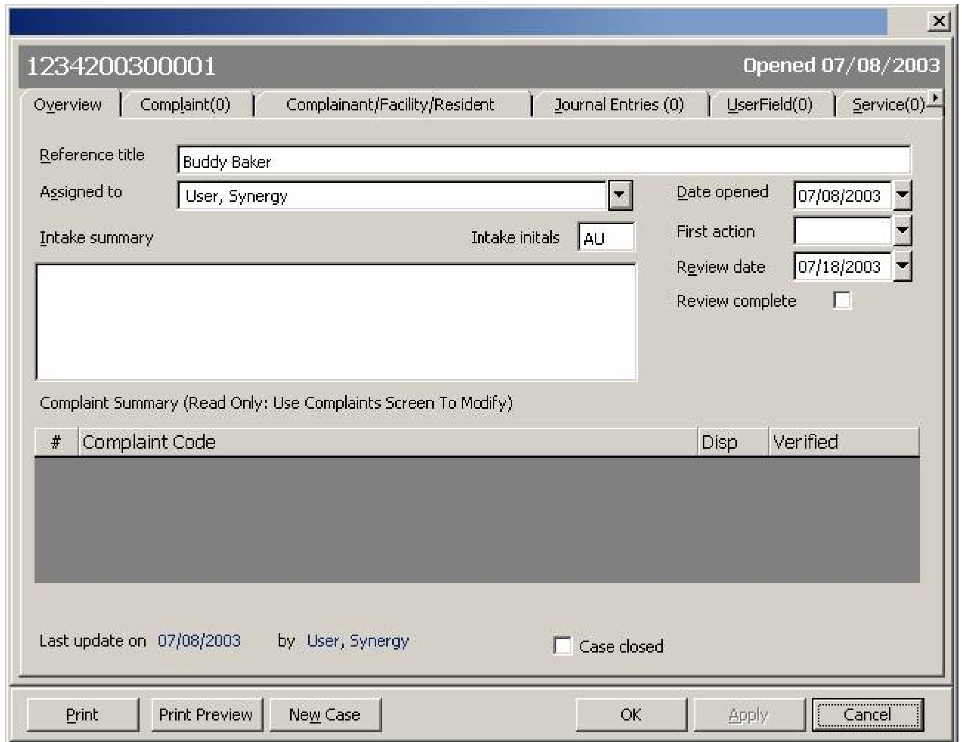
10 When finished, click **OK**. OmbudsManager will bring you to the ***main case screen*** (see "Case Data Entry" on page 26).

Case Data Entry

A case record contains several sections to organize the many types of case related data. OmbudsManager displays the sections as "Tabs" (as in file folder tabs) at the top of the screen.

Each case record contains:

- Overview - you can review the *Intake summary*, staff assignment, case dates, review date, the *Complaint Summary*, and case closing information.
- Complaint - manage the individual complaints associated with the case. You can add new complaints chosen from a ***customizable list*** (see "Complaint Codes" on page 127) or edit existing complaints.
- Complainant/Facility/Resident - view and modify facility, complainant, and resident information. ***Complainants,*** (see "Complainants" on page 89) ***Facilities*** (on page 71), and ***Residents*** (on page 85) have a own separate area for data management under *Tables* in the *Navigation* pane.
- Journal Entries - for journaling the case. You can view, create new, edit, and delete journal entries.
- User Field - you can define fields to store data with no other home in OmbudsManager. Use this section to enter data into user defined fields.
- Service - enter, edit, or delete any services provided during the course of the case.
- Perpetrator - manage records of individual perpetrators. You can also view and manage ***Perpetrator*** (on page 91) records in the *Tables* section of OmbudsManager.



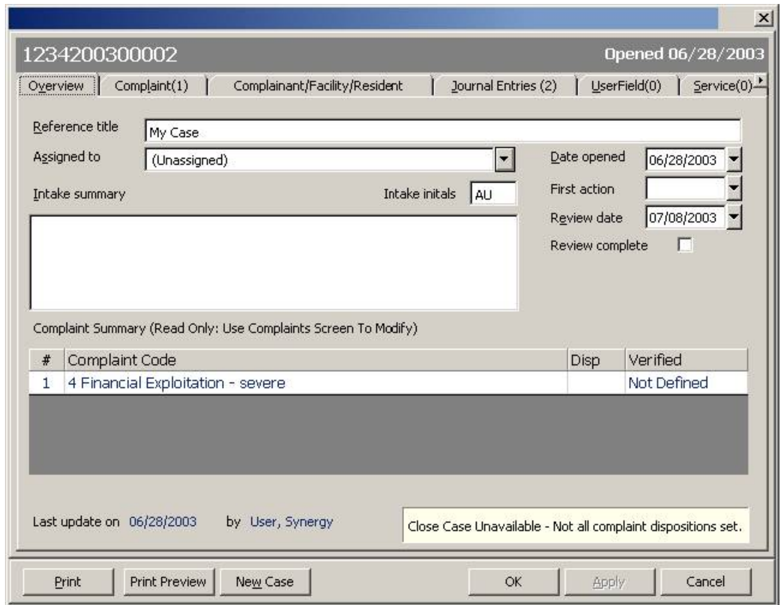
Case Overview

The case *Overview* contains the *Reference title*, staff assignment information, and the *Intake summary* and *initials*. *Overview* also contains important case dates, such as *Date opened*, *First action*, and *Review date*. You can see a read-only summary of the complaints at the bottom of the screen. Once the case is complete, come back to this screen ***to close the case*** (see "Closing a Case" on page 45).

➢ *To modify a case overview*

1. ***Create a new case*** (see "Creating a New Case" on page 24) or ***edit an existing case*** (see "Edit a Case" on page 44).
2. Click the **Overview** tab, if necessary.

3 Enter or modify the *Reference title, Intake summary,* and/or *Intake initials* as needed. The *Intake Summary* describes the source of and summaries the case. The *Reference title* prints on reports, but is not required.



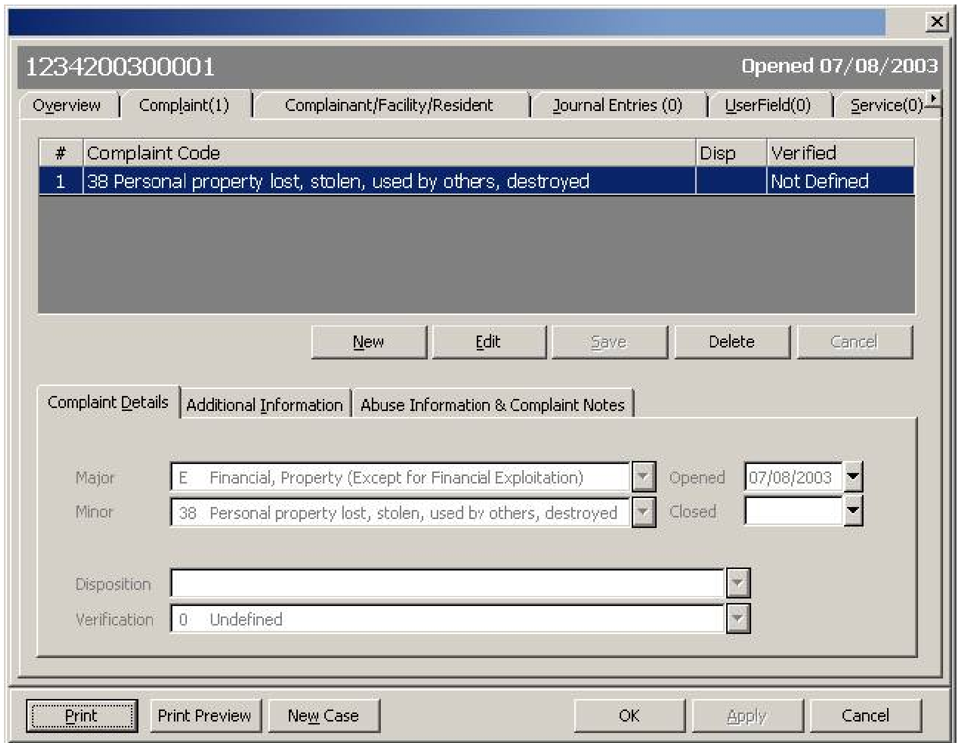
4 Change or enter *Date opened* and date of *First action* as appropriate. If checking off *Review complete*, make sure to enter a *Review date*.

5 To close the case, check the *Case closed* box. If you see a yellow box instead of a *Case closed* check box, follow the directions in the box to make the *Case closed* check box appear.

6 Click **Apply** to save your changes and keep the case open. Click **OK** to save and close the case.

Complaints

Complaints allow you to entered the details of the issues surrounding a case. For each complaint, you must select a *Major* and *Minor* complaint code. The Major complaint code is classified with an (A-Q) designation and contains several Minor complaint codes. Each minor complaint code has number (1-133). The codes are used by NORS Reporter for reporting. You can create custom ***complaint codes*** (on page 127) as well.



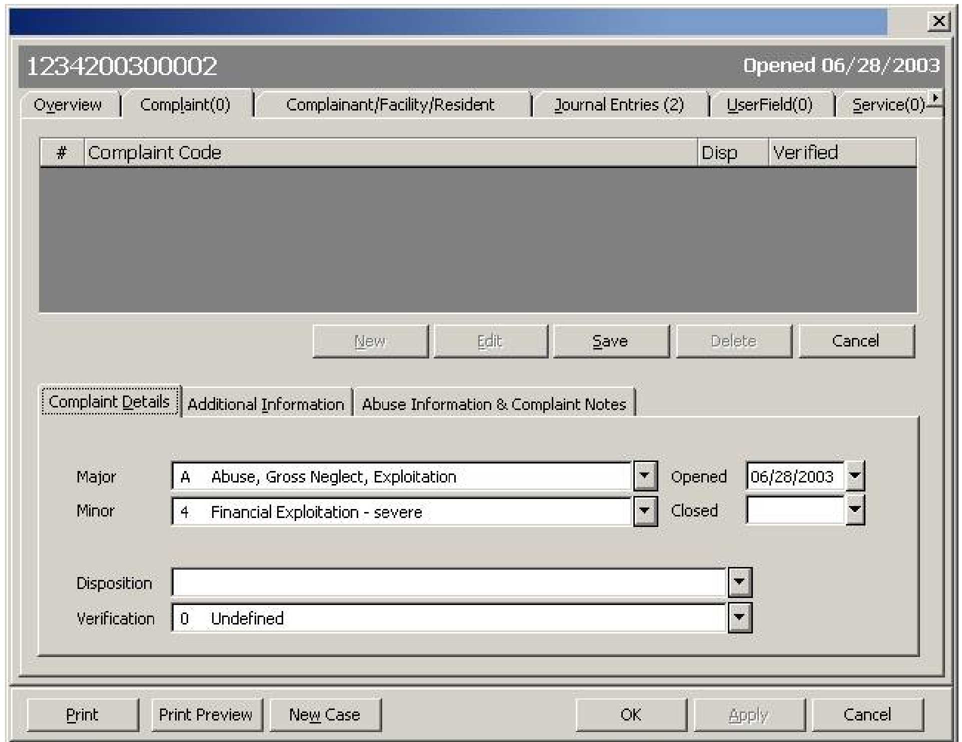
Add a New Complaint

Select a *Major* and *Minor* complaint code for each complaint. If the *Minor* entry is “Other”, a text field called *Other* will appear. Enter in the appropriate information - you cannot **Save** until the *Other* field is filled in.

➢ *To add a new complaint to a case record*

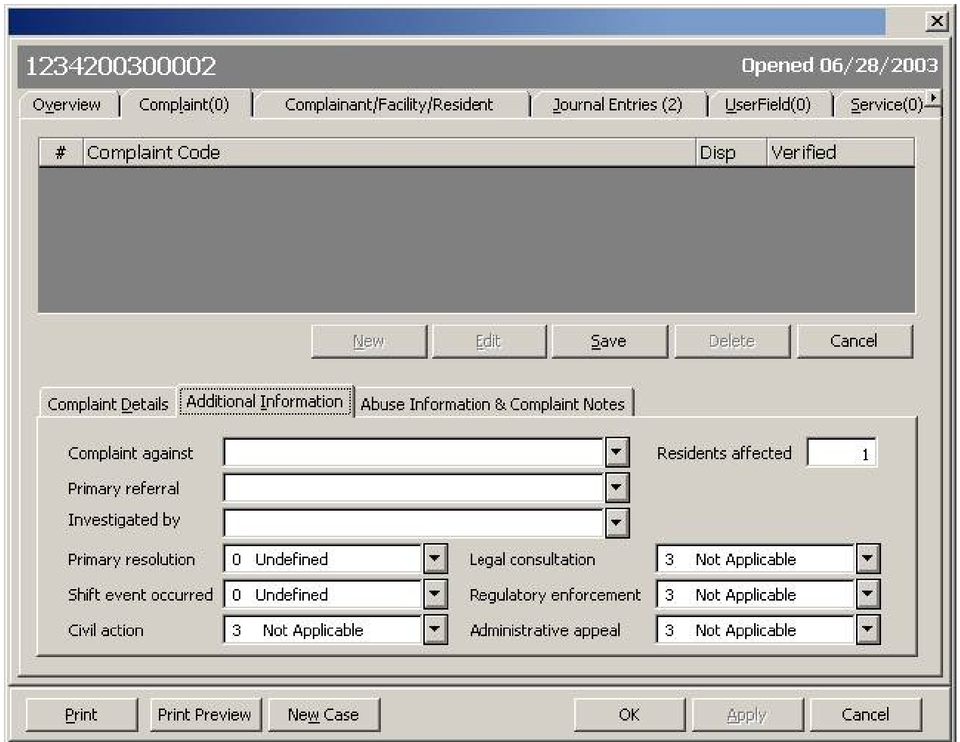
1. ***Create a new case*** (see "Creating a New Case" on page 24) or ***edit an existing case*** (see "Edit a Case" on page 44).
2. Click on the **Complaint** tab.
3. Click **New**.

4 In the *Complaint Details* tab, select a *Major* and *Minor* complaint code. The drop down lists support type-ahead searching, where the list will automatically select an item if you type in the code. (A-Q For Major, 1-133 for Minor) Enter an *Opened* and *Closed* date. If appropriate, select a *Disposition* and *Verification*.



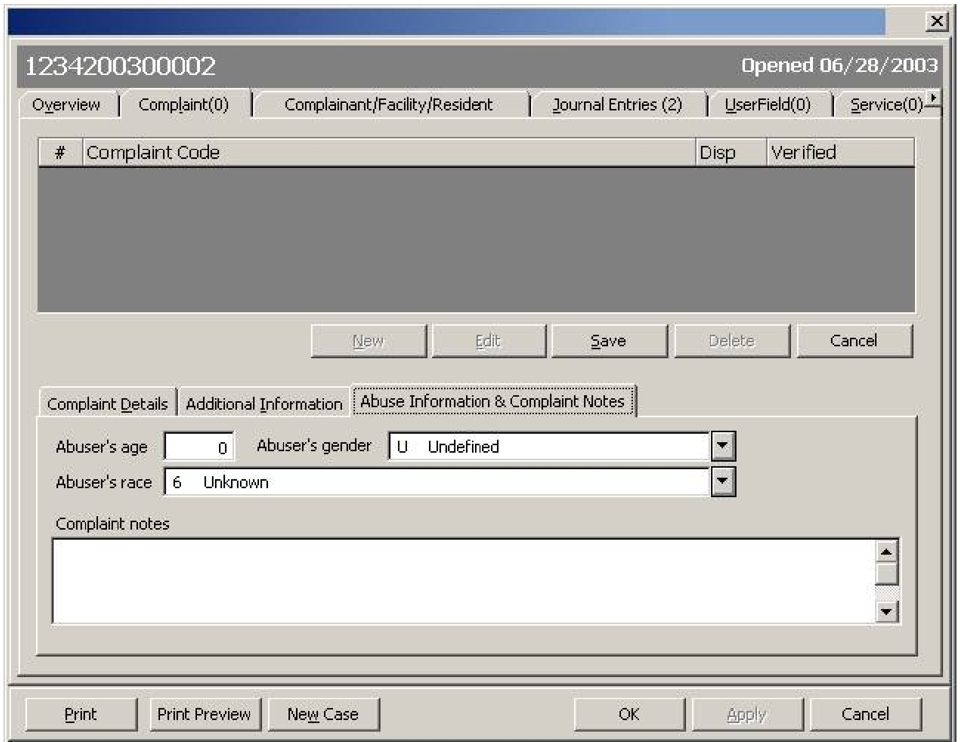
5 Click on **Additional Information**. Select *Complaint against*, *Primary referral,* and *Investigated by* as needed. You can change the options for the three fields. See ***Complaint Against*** (on page 121), ***Referral Agencies*** (on page 124), and ***Investigated by*** (on page 123) respectively for more information about field set up.

Select from the legal fields as necessary and enter the number of *Residents affected*.



6 Click **Abuse Information & Complaint Notes**. As known, enter the potential *Abuser's age*, *gender* and *race*. An *Abuser* may also be a ***Perpetrator*** (on page 91). Perpetrators, however, are usually for the entire case and not for each individual complaint. Use *Abuse Information* to store abuser information for the particular complaint.

Enter any comments about this complaint under *Complaint notes*.



7 When finished entering the complaint, click **Save**.

Edit an Existing Complaint

➢ *To modify a complaint*

1 Click on the **Main** bar in the *Navigation* pane. Then click on **Cases**.

-OR- From the **View** menu, select **Go To**, and then **Cases**. -OR- F2

2 Highlight the appropriate record. Use ***Find*** (see "Searching Cases" on page 21) to search for a particular case record. Creating a ***Filter*** (see "Filtering Cases" on page 22) will limit the number of records in view.

3 Click **Open** on the toolbar.

-OR- Right click and select **Edit Case**. -OR- Select **Open Case** from the **Cases** menu. -OR- CTRL+F2

4 Click on the **Complaint** tab.

5 Highlight the record you want to change.

6 Click **Edit**.

7 You will now be able to edit the information found in the three tab dividers at the bottom of the screen. Click **Complaint Details** to access the *Major* and *Minor* codes, and *Deposition* and *Verification* information. Click **Additional Information** to access data about people involved and legal status. Find Complaint Notes and abuser information under **Abuse Information & Complaint Notes**. For more information about complaint field please see ***Add a New Complaint*** (on page 29).

8 When finished, click **Save**.

Delete a Complaint

➢ ***To remove a complaint from a case***

1 Click on the **Main** bar in the *Navigation* pane. Then click on **Cases**.

-OR- From the **View** menu, select **Go To**, and then **Cases**. -OR- F2

2 Highlight the appropriate record. Use ***Find*** (see "Searching Cases" on page 21) to search for a particular case record. Creating a ***Filter*** (see "Filtering Cases" on page 22) will limit the number of records in view.

3 Click **Open** on the toolbar.

-OR- Right click and select **Edit Case**. -OR- Select **Open Case** from the **Cases** menu. -OR- CTRL+F2

4 Click on the **Complaint** tab.

5 Highlight the record you wish to remove.

6 Click **Delete**.

7 At the prompt, click **Yes** to continue or **No** to cancel.

Complainant/Facility/Resident

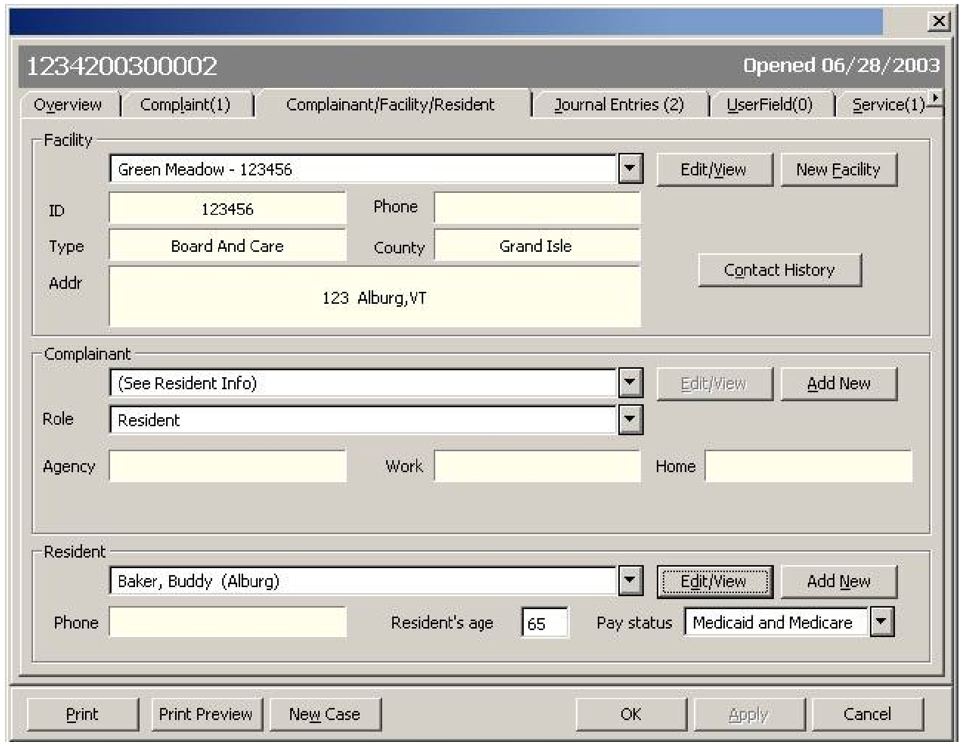
The Complainant/Facility/Resident area has three distinct sections.

The top of the screen contains *Facility* and *Facility Contact History*. In the middle of the screen, you can select a *Complainant* and a *Complainant Role*. The bottom of the screen shows the *Resident* record for this case.

➢ ***To fill out the Complainant/Facility/Resident section***

1 ***Create a new case*** (see "Creating a New Case" on page 24) or ***edit an existing case*** (see "Edit a Case" on page 44).

2 Click on **Complainant/Facility/Resident**.



3 Select a *Facility*. If you do not see the facility you need, click **New Facility**. Enter relevant information and click **OK**. You can also add and edit facility records outside of cases. For more information managing facilities, please see ***Facilities*** (on page 71). Modify the facility you have selected, if necessary, by clicking **Edit/View.**

After selecting a facility, you can view a history of contacts (stored as activities) your program has made with the facility. Click **Contact History** for a list of activities associated with the facility. In the *Contact History* screen, you can view, add, edit, and delete contacts. Please see ***Using Contact History*** (on page 83) for more information.

Type in this pull down (as with the other pull downs in the program) and OmbudsManager will jump to the appropriate choice. You can set the order of which appears first - *Facility ID* or *Facility Name*. This means that you can choose whether or not OmbudsManager will jump to the Facility ID or Facility Name. See ***OmbudsManager Defaults*** (on page 96) for details on setting up this pull down.

4 Select a *Complainant*. Click **Add New** if you don't see the person you need in the *Complainant* drop down. Click **OK** when finished entering data. The *Complainants* area of OmbudsManager allows you to manage complainant records outside of cases.

After you've selected a *Complainant* you can modify their information from this screen by clicking **Edit/View**. Please see ***Complainants*** (on page 89) for more information on using this screen.

5 Choose a complainant *Role* - the relationship the complainant has to the resident. If you choose "Other", describe the role in the newly appeared *Other description* field to save the record. OmbudsManager does not display the *Other description* when selecting non-other roles. Customize the complaint *Role* as necessary - see ***Complainant Roles*** (on page 125).

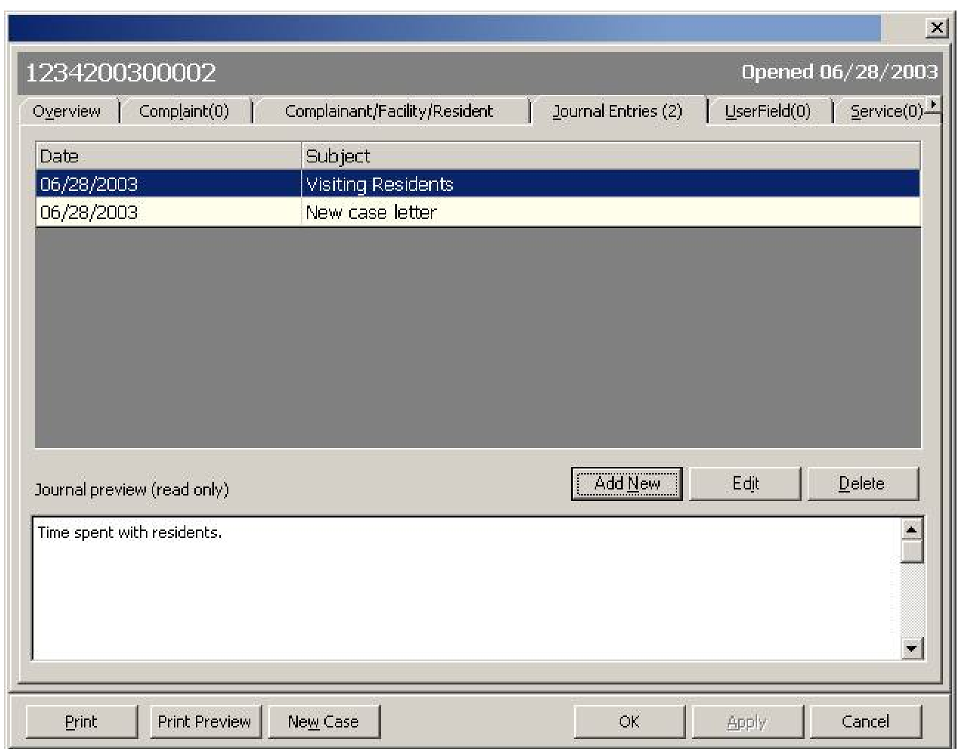
6 Use the pull down at the bottom of the screen to select a *Resident*. Click **Add New** to create a new record if you can't find the resident you are looking for. When you create a new record, OmbudsManager will automatically copy the address information from the facility to the resident's record. Manage ***Resident records in Tables*** (see "Residents" on page 85) when outside of case files.

After creating or selecting a resident, the program will copy the appropriate information into the *Resident's age*, and *Pay Status* fields. These fields are not linked directly to the resident record. Instead, *Resident's age* and *Pay status* are stored with the case record. Storing these fields with the case record allows you to view changes over time to the resident's status.

7 When finished entering data, click **Apply** to keep the cases screen open or **OK** to close.

Journal Entries

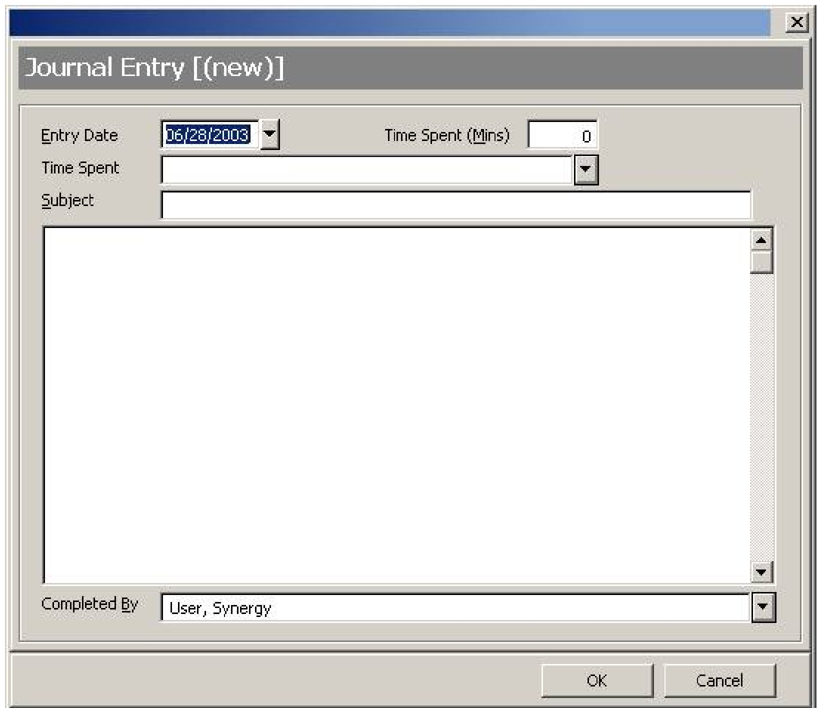
OmbudsManager offers unlimited journal entries associated with each case for tracking case history, investigation and resolution.



Add a Journal Entry

➢ *To create a journal entry*

1. ***Create a new case*** (see "Creating a New Case" on page 24) or ***edit an existing case*** (see "Edit a Case" on page 44).
2. Click on the **Journal Entries** tab.
3. Click **Add New**.
4. Enter the *Time Spent (Mins)* and a *Subject*. Select the *Time Spent* category and *Completed By*. Modify the *Entry Date*, if necessary. Enter the journal entry in large white text box.



5. When finished, click **OK**.

Edit a Journal Entry

➢ *To modify a case journal entry*

1. Click on the **Main** bar in the *Navigation* pane. Then click on **Cases**.

   -OR- From the **View** menu, select **Go To**, and then **Cases**. -OR- F2

2. Highlight the appropriate record. Use ***Find*** (see "Searching Cases" on page 21) to search for a particular case record. Creating a ***Filter*** (see "Filtering Cases" on page 22) will limit the number of records in view.
3. Click **Open** on the toolbar.

   -OR- Right click and select **Edit Case**. -OR- Select **Open Case** from the **Cases** menu. -OR- CTRL+F2

4 Click on the **Journal Entries** tab.

5 Highlight the record you want to change.

6 Click **Edit**.

7 Modify the *Entry Date*, *Time Spent (Mins)*, *Subject*, journal text, *Completed By* and/or *Time Spent* category as needed.

8 When finished, click **OK**.

Delete a Journal Entry

➢ ***To remove a journal entry from a case record***

1 Click on the **Main** bar in the *Navigation* pane. Then click on **Cases**.

-OR- From the **View** menu, select **Go To**, and then **Cases**. -OR- F2

2 Highlight the appropriate record. Use ***Find*** (see "Searching Cases" on page 21) to search for a particular case record. Creating a ***Filter*** (see "Filtering Cases" on page 22) will limit the number of records in view.

3 Click **Open** on the toolbar.

-OR- Right click and select **Edit Case**. -OR- Select **Open Case** from the **Cases** menu. -OR- CTRL+F2

4 Click on the **Journal Entries** tab.

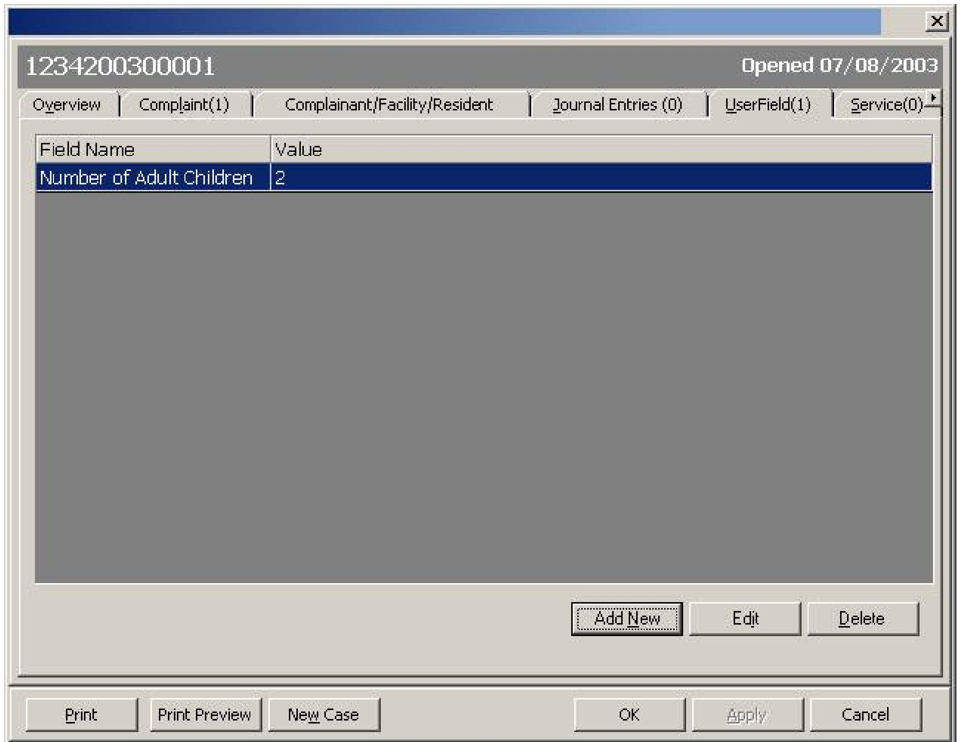
5 Highlight the record you wish to remove.

6 Click **Delete**.

7 At the prompt, click **Yes** to continue or **No** to cancel.

User Fields

User Fields are fields that you can create to store custom data that has no other home in OmbudsManager. Use the System Admin section of OmbudsManager to create new ***User Fields*** (on page 128).



Create a New User Field Entry

➢ ***To enter information into a case user field***

1. ***Create a new case*** (see "Creating a New Case" on page 24) or ***edit an existing case*** (see "Edit a Case" on page 44).
2. Click on the **UserField** tab.
3. Click **Add New**.
4. Select a *User Field*. After selecting a user field, OmbudsManager will automatically display at least one data entry field. Enter information as appropriate.

5 Click **OK**.

Modify a User Field Entry

➢ ***To edit an existing case user field***

1 Click on the **Main** bar in the *Navigation* pane. Then click on **Cases**.

-OR- From the **View** menu, select **Go To**, and then **Cases**. -OR- F2

2 Highlight the appropriate record. Use ***Find*** (see "Searching Cases" on page 21) to search for a particular case record. Creating a ***Filter*** (see "Filtering Cases" on page 22) will limit the number of records in view.

3 Click **Open** on the toolbar.

-OR- Right click and select **Edit Case**. -OR- Select **Open Case** from the **Cases** menu. -OR- CTRL+F2

4 Click on the **UserField** tab.

5 Highlight the record you want to change.

6 Click **Edit**.

7 Select a new *User Field* and enter new information or modify the existing data field(s).

8 Click **OK**.

Remove a User Field Entry

➢ ***To remove a case user field***

1 Click on the **Main** bar in the *Navigation* pane. Then click on **Cases**.

-OR- From the **View** menu, select **Go To**, and then **Cases**. -OR- F2

2 Highlight the appropriate record. Use ***Find*** (see "Searching Cases" on page 21) to search for a particular case record. Creating a ***Filter*** (see "Filtering Cases" on page 22) will limit the number of records in view.

3 Click **Open** on the toolbar.

-OR- Right click and select **Edit Case**. -OR- Select **Open Case** from the **Cases** menu. -OR- CTRL+F2

4 Click on the **UserField** tab.

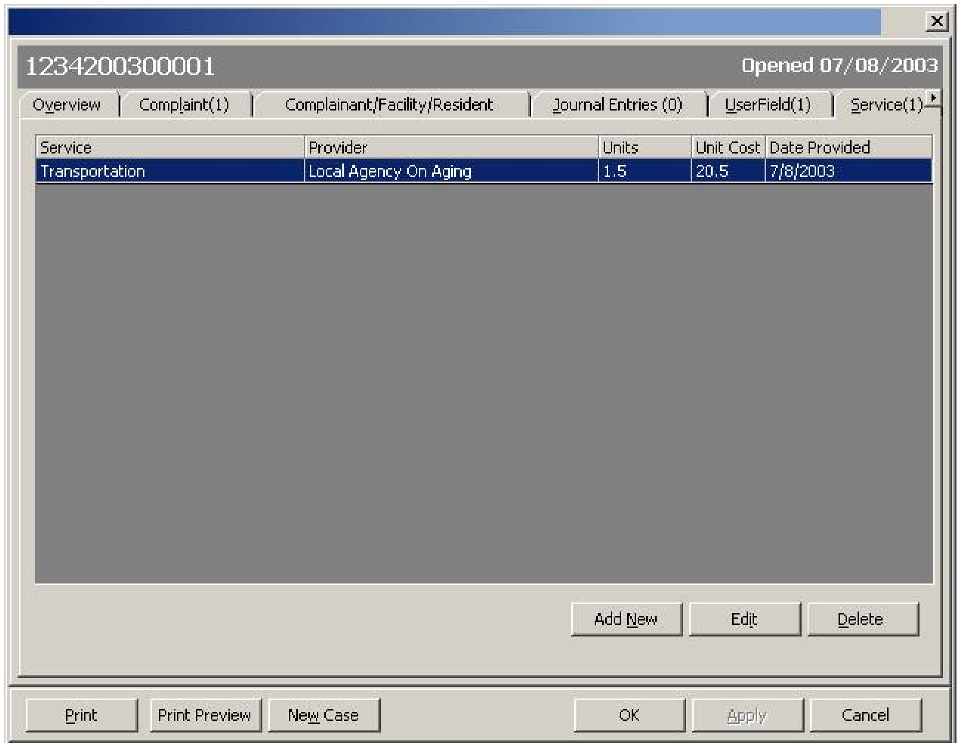
5 Highlight the record you wish to remove.

6 Click **Delete**.

7 At the prompt, click **Yes** to continue or **No** to cancel.

Service

The *Service* section stores records of services provided in association with a case. Each service record contains a *Service* and *Provider* name, date of service, number of *Units*, and *Unit Cost*.

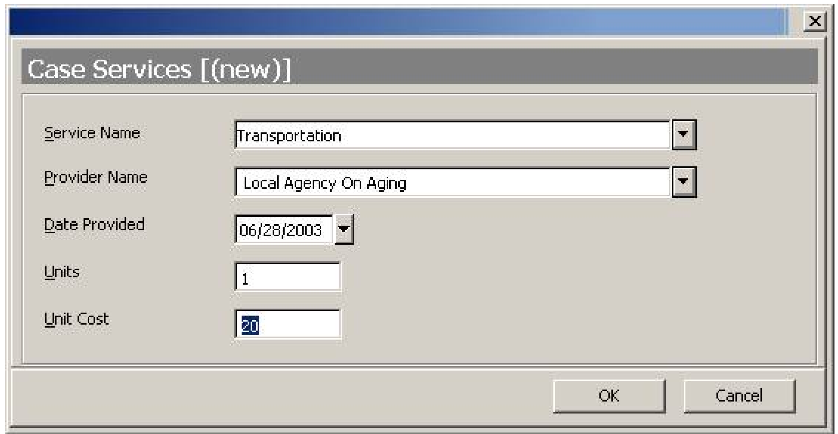


Create a New Service Record

➢ ***To add a new service record to a case***

1. ***Create a new case*** (see "Creating a New Case" on page 24) or ***edit an existing case*** (see "Edit a Case" on page 44).
2. Click on the **Service** tab.
3. Click **Add New**.

4 In the *Case Services* screen, select a *Service Name* and *Provider Name*. Enter the *Date Provided*, *Units*, and *Unit Cost*.



5 Click **OK** when finished.

Modify a Service Record

➢ ***To change an existing case service record***

1 Click on the **Main** bar in the *Navigation* pane. Then click on **Cases**.

-OR- From the **View** menu, select **Go To**, and then **Cases**. -OR- F2

2 Highlight the appropriate record. Use ***Find*** (see "Searching Cases" on page 21) to search for a particular case record. Creating a ***Filter*** (see "Filtering Cases" on page 22) will limit the number of records in view.

3 Click **Open** on the toolbar.

-OR- Right click and select **Edit Case**. -OR- Select **Open Case** from the **Cases** menu. -OR- CTRL+F2

4 Click on the **Service** tab.

5 Highlight the record you want to change.

6 Click **Edit**.

7 Change the *Service Name*, *Provider Name*, *Date Provided*, *Units* and/or *Unit Cost*.

8 When finished, click **OK**.

Delete a Service Record

➢ ***To remove a service record from a case***

1 Click on the **Main** bar in the *Navigation* pane. Then click on **Cases**.

-OR- From the **View** menu, select **Go To**, and then **Cases**. -OR- F2

2 Highlight the appropriate record. Use ***Find*** (see "Searching Cases" on page 21) to search for a particular case record. Creating a ***Filter*** (see "Filtering Cases" on page 22) will limit the number of records in view.

3 Click **Open** on the toolbar.

-OR- Right click and select **Edit Case**. -OR- Select **Open Case** from the **Cases** menu. -OR- CTRL+F2

4 Click on the **Service** tab.

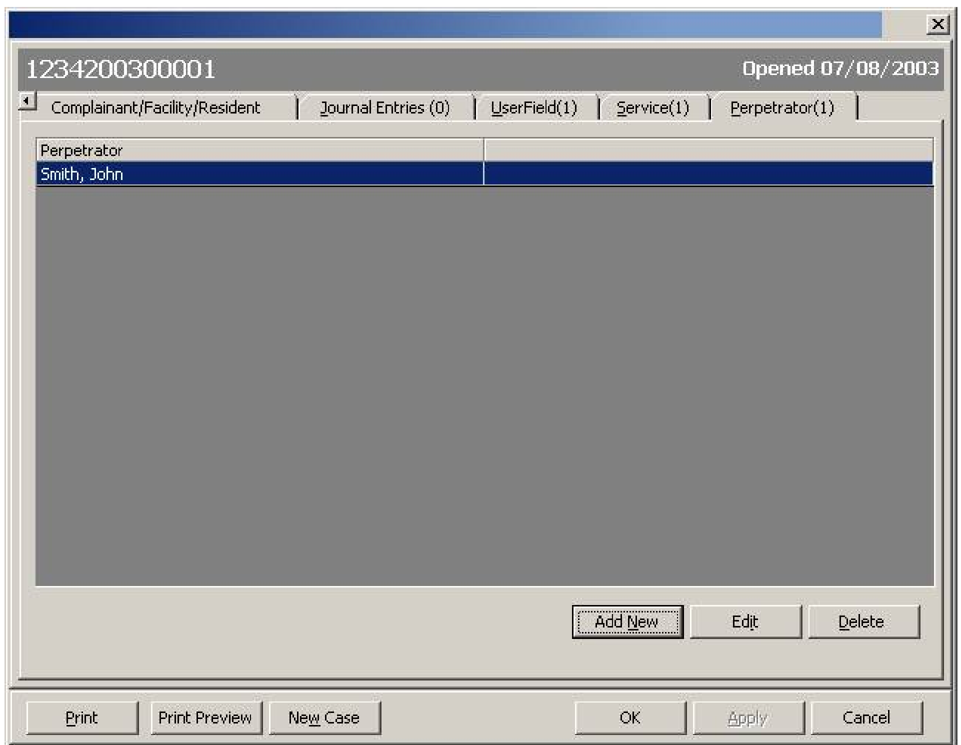
5 Highlight the record you wish to remove.

6 Click **Delete**.

7 At the prompt, click **Yes** to continue or **No** to cancel.

Perpetrator

Perpetrators store records of potential perpetrators of cases. A case can have more than one perpetrator.



Add a Perpetrator

➢ ***To add a perpetrator record to a case***

1 ***Create a new case*** (see "Creating a New Case" on page 24) or ***edit an existing case*** (see "Edit a Case" on page 44).

2 Click on the **Perpetrator** tab.

3 Click **Add New**.

4 Select a *Perpetrator Name* from the pull down menu.

If you do not see the name you are looking for, click **Add New**. Enter any relevant information including *First Name*, *Last Name*, address information, *Gender*, and any *Notes*. Click **OK** when finished. See ***Perpetrator*** (on page 91) for more information about managing perpetrator records outside of cases.

5 Click **OK** to save and close the *Case Perpetrators* window.

Edit a Perpetrator

➢ ***To modify a perpetrator name for a case***

1 Click on the **Main** bar in the *Navigation* pane. Then click on **Cases**.

-OR- From the **View** menu, select **Go To**, and then **Cases**. -OR- F2

2 Highlight the appropriate record. Use ***Find*** (see "Searching Cases" on page 21) to search for a particular case record. Creating a ***Filter*** (see "Filtering Cases" on page 22) will limit the number of records in view.

3 Click **Open** on the toolbar.

-OR- Right click and select **Edit Case**. -OR- Select **Open Case** from the **Cases** menu. -OR- CTRL+F2

4 Click on the **Perpetrator** tab.

5 Highlight the appropriate record.

6 Click **Edit**.

7 Select a new *Perpetrator Nam*e from the pull down menu.

If you do not see the name you are looking for, click **Add New**. Enter any relevant information including *First Name*, *Last Name*, address information, *Gender*, and any *Notes*. Click **OK** when finished.

8 Click **OK**.

Delete a Perpetrator

➢ ***To delete a case perpetrator***

1 Click on the **Main** bar in the *Navigation* pane. Then click on **Cases**.

-OR- From the **View** menu, select **Go To**, and then **Cases**. -OR- F2

2 Highlight the appropriate record. Use ***Find*** (see "Searching Cases" on page 21) to search for a particular case record. Creating a ***Filter*** (see "Filtering Cases" on page 22) will limit the number of records in view.

3 Click **Open** on the toolbar.

-OR- Right click and select **Edit Case**. -OR- Select **Open Case** from the **Cases** menu. -OR- CTRL+F2

4 Click on the **Perpetrator** tab.

5 Highlight the record you wish to remove.

6 Click **Delete**.

7 At the prompt, click **Yes** to continue or **No** to cancel.

Edit a Case

When you open an existing case, the tabbed *Case* screen appears. The *Case Quick Entry* screen only appears when ***you first create the case*** (see "Creating a New Case" on page 24).

If you are reviewing an existing case record and wish to create a new case, click **New Case** at the bottom of the screen.

➢ *To modify a case*

1 Click on the **Main** bar in the *Navigation* pane. Then click on **Cases**.

-OR- From the **View** menu, select **Go To**, and then **Cases**. -OR- F2

2 Highlight the appropriate record. Use ***Find*** (see "Searching Cases" on page 21) to search for a particular case record. Creating a ***Filter*** (see "Filtering Cases" on page 22) will limit the number of records in view.

3 Click **Open** on the toolbar.

-OR- Right click and select **Edit Case**. -OR- Select **Open Case** from the **Cases** menu. -OR- CTRL+F2

4 Enter or modify information in any or all of the seven tabbed sections of the case. Use the tabs to switch between sections. Please see ***Case Data Entry*** (on page 26) for details on entering data into case record sections.

5 Click **Apply** to save your work and keep the screen open. Click **OK** when finished to close the case record.

Closing a Case

To ensure the proper collection of information for the AoA report, there are some key elements that are required before a closing a case. First, each complaint within a case file must be defined with a *Disposition*. The facility information also has to be set to something other than *(Unknown)*.

➢ *To close a case*

1 Click on the **Main** bar in the *Navigation* pane. Then click on **Cases**.

-OR- From the **View** menu, select **Go To**, and then **Cases**. -OR- F2

2 Highlight the appropriate record. Use ***Find*** (see "Searching Cases" on page 21) to search for a particular case record. Creating a ***Filter*** (see "Filtering Cases" on page 22) will limit the number of records in view.

3 Click **Open** on the toolbar.

-OR- Right click and select **Edit Case**. -OR- Select **Open Case** from the **Cases** menu. -OR- CTRL+F2

4 Check the box to the left of *Case closed*. If you do not see a *Case closed* check box, follow the instructions in the yellow box in the lower right of the screen to meet the requirements for closing the case.

5 Click **OK** to save and close the screen.

Remove a Case

➢ *To remove a case record from OmbudsManager*

1 Click on the **Main** bar in the *Navigation* pane. Then click on **Cases**.

-OR- From the **View** menu, select **Go To**, and then **Cases**. -OR- F2

2 Highlight the appropriate record. Use ***Find*** (see "Searching Cases" on page 21) to search for a particular case record. Creating a ***Filter*** (see "Filtering Cases" on page 22) will limit the number of records in view.

3 Click **Delete** on the toolbar.

-OR- Right click and select **Delete Case**. -OR- Select **Delete Case** from the **Cases** menu.

4 At the prompt, click **Yes** to continue or **No** to cancel.

Printing a Case File

You can print two types of case reports, Case Files and Case Intake Summary. A *Case File* report prints out all or part of the data associated with a case except the *Intake* and *Complaints*. You can print a case file from the list of cases or from within the case record.

To preview the record before it goes to the printer, click **Print Preview** instead of **Print** at the appropriate step.

➢ *To print a case file from the case list*

1 Click on the **Main** bar in the *Navigation* pane. Then click on **Cases**.

-OR- From the **View** menu, select **Go To**, and then **Cases**. -OR- F2

2 Highlight the appropriate record.

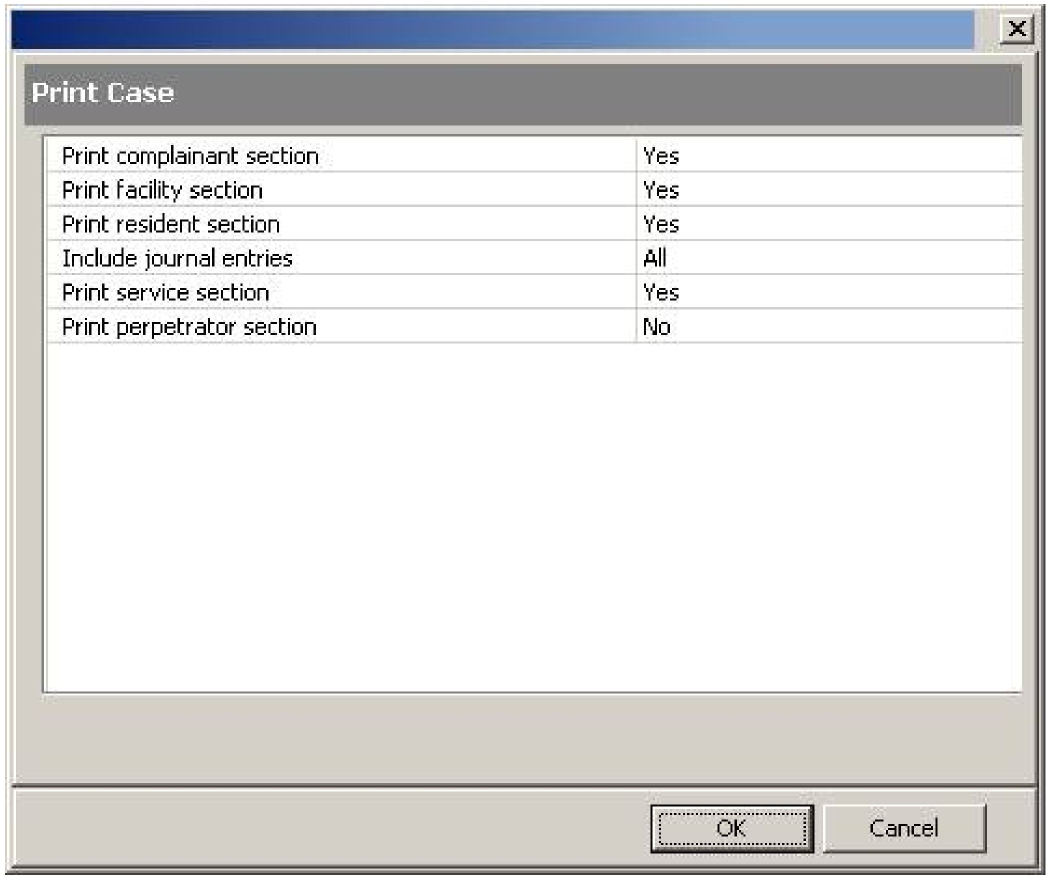
3 On the toolbar, click **Print**.

-OR- From the **File** menu, select **Print**. -OR- CTRL+P

4 Select *Case File Report*.

5 Click **OK**.

6 In *Print Cases*, select which parts of the case you wish to print. Use the pull downs to change the selections.



7 Click **OK** to print. OmbudsManager will send the case file to your default printer.

➢ *To print a case file while viewing a particular record*

1 Click on the **Main** bar in the *Navigation* pane. Then click on **Cases**.

-OR- From the **View** menu, select **Go To**, and then **Cases**. -OR- F2

2 Highlight the appropriate record. Use ***Find*** (see "Searching Cases" on page 21) to search for a particular case record. Creating a ***Filter*** (see "Filtering Cases" on page 22) will limit the number of records in view.

3 Click **Open** on the toolbar.

-OR- Right click and select **Edit Case**. -OR- Select **Open Case** from the **Cases** menu. -OR- CTRL+F2

4 Click **Print** at the bottom of the screen.

Click **Print Preview** to see the report before sending it to the print. Click **Print Report** to print and **Close** to remove the preview screen from view.

5 Select *Case File Report*.

6 Click **OK**.

7 In *Print Cases*, select which parts of the case you wish to print. Use the pull downs to change the selections.

8 Click **OK** to print. OmbudsManager will send the case file to your default printer.

Printing a Case Intake Summary

OmbudsManager can print two types of case summaries - *Case File* and *Case Intake*. The *Case Intake* prints a summary of the case with Resident, Facility, Complainant, Intake, and optionally Complaints in a landscaped report. You can print a case intake from the list of cases or from within the case record.

To preview the record before it goes to the printer, click **Print Preview** instead of **Print** at the appropriate step.

➢ *To print a case intake from the case list*

1 Click on the **Main** bar in the *Navigation* pane. Then click on **Cases**.

-OR- From the **View** menu, select **Go To**, and then **Cases**. -OR- F2

2 Highlight the appropriate record.

3 On the toolbar, click **Print**.

-OR- From the **File** menu, select **Print**. -OR- CTRL+P

4 Select *Case Intake Report*. Check *Include Complaint Data* to also print the complaints on the report.

5 Click **OK** to print. OmbudsManager will send the case file to your default printer.

➢ *To print a case intake from a particular record*

1 Click on the **Main** bar in the *Navigation* pane. Then click on **Cases**.

-OR- From the **View** menu, select **Go To**, and then **Cases**. -OR- F2

2 Highlight the appropriate record. Use ***Find*** (see "Searching Cases" on page 21) to search for a particular case record. Creating a ***Filter*** (see "Filtering Cases" on page 22) will limit the number of records in view.

3 Click **Open** on the toolbar.

-OR- Right click and select **Edit Case**. -OR- Select **Open Case** from the **Cases** menu. -OR- CTRL+F2

4 Click **Print** at the bottom of the screen.

Click **Print Preview** to see the report before sending it to the print. Click **Print Report** to print and **Close** to remove the preview screen from view.

5 Select *Case Intake Report*. Check *Include Complaint Data* to also print the complaints on the report.

6 Click **OK** to print. OmbudsManager will send the case file to your default printer.

Printing a List of Cases

You can customize the list of cases to print by creating a ***Filter*** (see "Filtering Cases" on page 22).

➢ ***To print the list of cases displayed***

1 Click on the **Main** bar in the *Navigation* pane. Then click on **Cases**.

-OR- From the **View** menu, select **Go To**, and then **Cases**. -OR- F2

2 Use a ***Filter*** (see "Filtering Cases" on page 22) as necessary to limit the cases in view.

3 Click **Print Grid** on the toolbar.

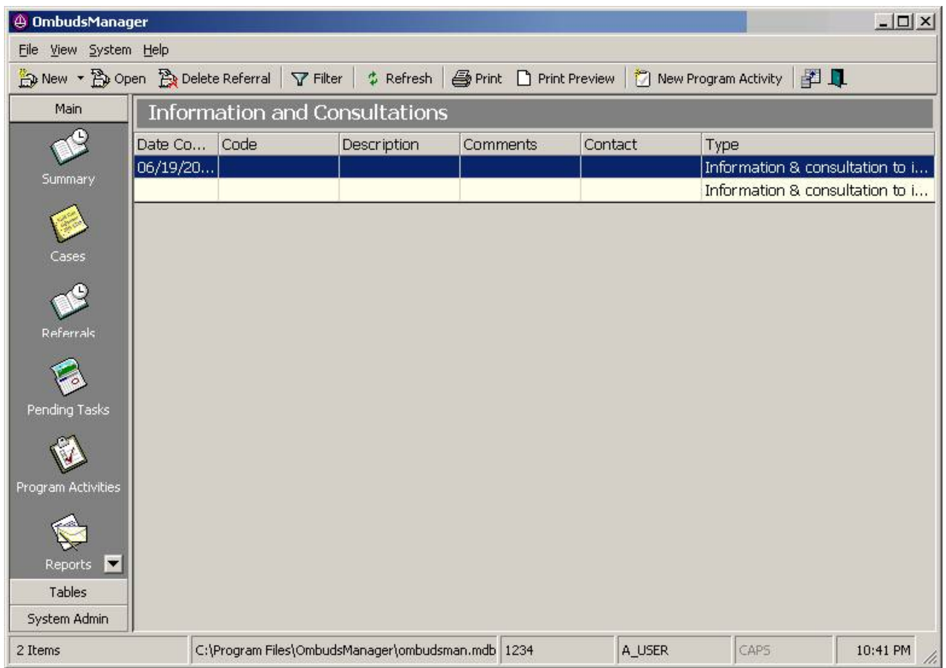
-OR- Right click and select **Print Grid**. -OR- From the **File** menu, select **Print Grid**.

4 Click **OK** to print.

Creating Referrals

Information and consultation ***activities*** (see "Program Activities" on page 57) for cases are known as *Referrals*. Referrals are part of the *Activities* system in OmbudsManager, which also tracks facility related contacts. You can schedule referrals for future dates - ***Pending Tasks*** (see "Managing Pending Tasks" on page 55) summaries all open activities for your username.

You can also enter referrals in the Program Activities section - just select *Information and Consultation* as the *Activity Type*.



Using the Referral Filter

Use the referral filter to limit the number of referral records on the screen. To clear the referral screen filter, click **Clear All** in step 3.

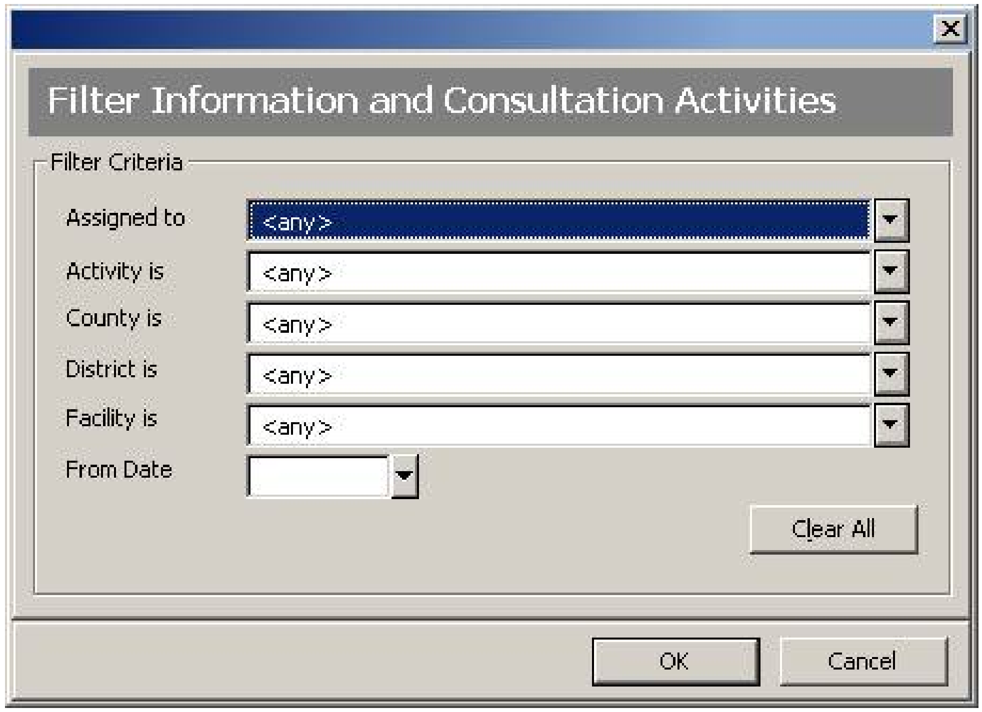
➢ ***To limit the number of records on the referral screen***

1 Click on the **Main** bar in the *Navigation* pane. Then click on **Referrals**.

-OR- From the **View** menu, select **Go To**, and then **Referrals**. -OR- F3

2 Click **Filter** on the toolbar.

-OR- Right click and select **Filter**.



3 Select any one or more of the filter criteria. The referrals displayed in the filtered view will meet all of the criteria you selected.

4 When finished, click **OK**.

Create a New Referral

You do not need to access *Referrals* to create new referral. On any screen, select **New Referral** from the **New** button on the toolbar or press CTRL+R.

➢ ***To create a new referral***

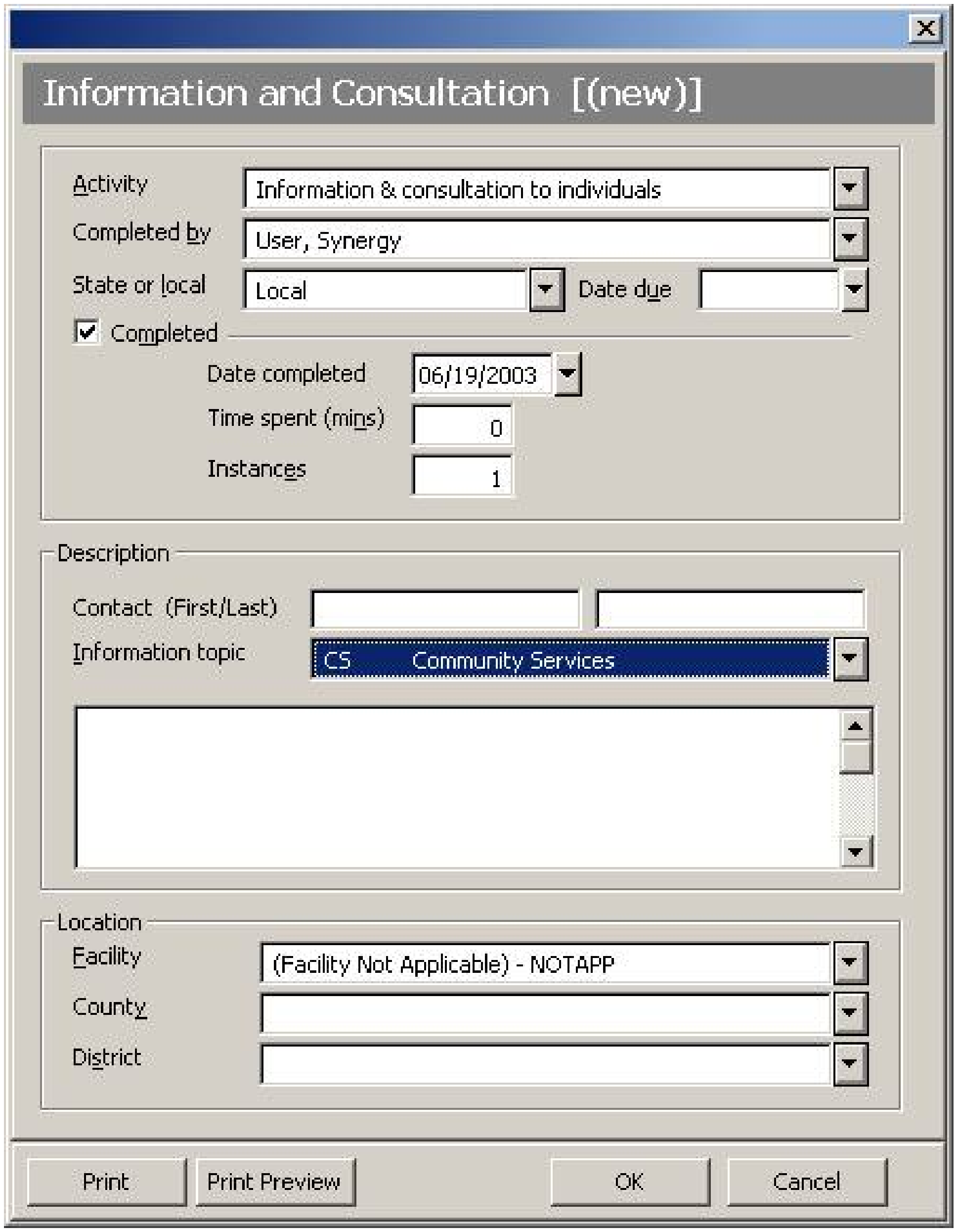
1 Click on the **Main** bar in the *Navigation* pane. Then click on **Referrals**.

-OR- From the **View** menu, select **Go To**, and then **Referrals**. -OR- F3

2 Click **New** on the toolbar.

-OR- Right click and select **New Referral**. -OR- CTRL+R

3 In the *Information and Consultation* screen, enter the *Date completed*, any *Time spent (in minutes)*, and *Instances*. If this referral is not yet completed, leave the *Date completed* blank. Under *Description*, enter a *Contact*, select an *Information topic* and enter any *Notes*. In *Location*, select a *Facility*, *County*, and *District*.



4 When finished, click **OK**.

Edit an Existing Referral

➢ ***To change an existing referral***

1 Click on the **Main** bar in the *Navigation* pane. Then click on **Referrals**.

-OR- From the **View** menu, select **Go To**, and then **Referrals**. -OR- F3

2 Highlight the appropriate record.

3 Click **Open** on the toolbar.

-OR- Right click and select **Edit Referral**. -OR- CTRL+F3

4 Edit or modify fields as necessary. Check *Completed* if the referral is now finished. OmbudsManager will fill in the *Date completed* with today's date automatically.

5 When finished with the changes, click **OK**.

Delete a Referral

➢ ***To delete a referral***

1 Click on the **Main** bar in the *Navigation* pane. Then click on **Referrals**.

-OR- From the **View** menu, select **Go To**, and then **Referrals**. -OR- F3

2 Highlight the record you wish to remove.

3 Click **Delete Referral** on the toolbar.

-OR- Right click and select **Delete Referral**.

4 At the prompt, click **Yes** to continue or **No** to cancel.

Print a Referral

To preview the referral before it prints, click **Print Preview** instead of **Print** below. Then click **Print Report** to print and **Close** to close the preview screen.

➢ ***To print the details of a referral record***

1 Click on the **Main** bar in the *Navigation* pane. Then click on **Referrals**.

-OR- From the **View** menu, select **Go To**, and then **Referrals**. -OR- F3

2 Highlight the appropriate record.

3 On the toolbar, click **Print**.

-OR- From the **File** menu, select **Print**. -OR- CTRL+P

------------------------ OR ------------------------

1 Click on the **Main** bar in the *Navigation* pane. Then click on **Referrals**.

-OR- From the **View** menu, select **Go To**, and then **Referrals**. -OR- F3

2 ***Create a new referral*** (on page 52) or ***edit an existing one*** (see "Edit an Existing Referral" on page 53).

3 Click **Print** at the bottom of the screen.

Print a List of Referrals

➢ ***To print the list of referrals displayed on the screen***

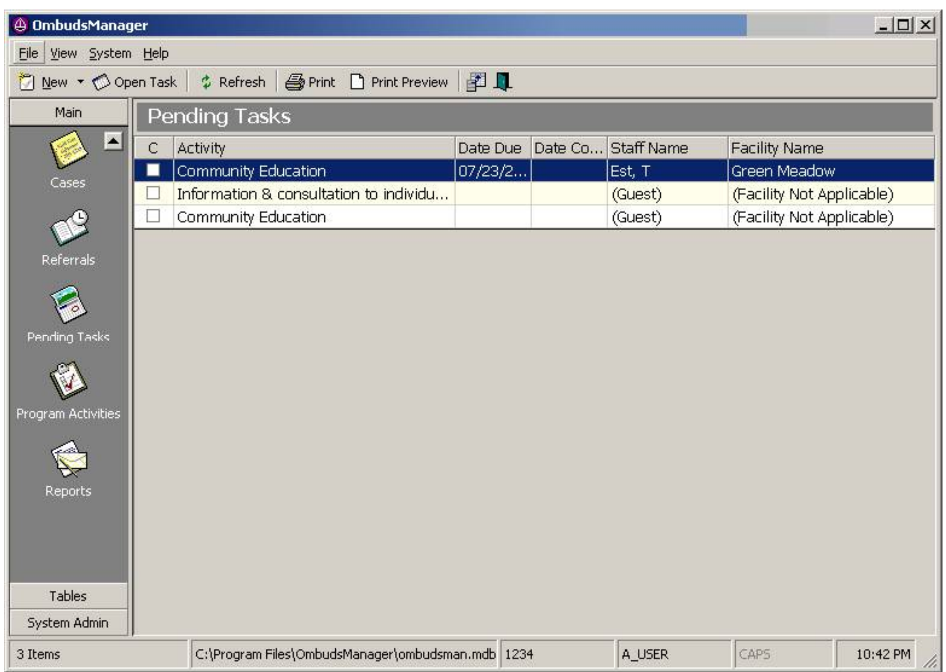
1 Click on the **Main** bar in the *Navigation* pane. Then click on **Referrals**.

-OR- From the **View** menu, select **Go To**, and then **Referrals**. -OR- F3

2 From the **File** menu, select **Print Grid**.

Managing Pending Tasks

Pending Tasks screen displays all incomplete activities for the current user. . This section does not describe how to add or delete a task. Use the *Pending Tasks* screen to manage your current tasks - create or delete activities in ***Referrals*** (see "Creating Referrals" on page 51), ***Program Activities*** (see "Program Activities, or ***Contact History*** (see "Using Contact History" on page 83) in *Facilities*.



Edit an Existing Task

➢ ***To mark a task (activity) as completed or to change task information***

1 Click on the **Main** bar in the *Navigation* pane and then **Pending Tasks**.

-OR- From the **View** menu, select **Go To**, and then **Tasks**. -OR- F4

2 Highlight the appropriate record.

3 Click **Open Task** on the toolbar.

-OR- Right click and select **Open Task**. -OR- CTRL+F4

4 To mark the task (activity) as *Completed*, check the *Competed* box found in the middle of the screen. Edit or add information as needed.

5 Click **OK** when you are finished.

Print a Task

To preview the task before it prints, click **Print Preview** instead of **Print** below. Then click **Print Report** to print and **Close** to close the preview screen.

➢ ***To print a task (activity)***

1 Click on the **Main** bar in the *Navigation* pane and then **Pending Tasks**.

-OR- From the **View** menu, select **Go To**, and then **Tasks**. -OR- F4

2 Highlight the appropriate record.

3 On the toolbar, click **Print**.

-OR- From the **File** menu, select **Print**. -OR- CTRL+P

------------------------ OR ------------------------

1 Click on the **Main** bar in the *Navigation* pane and then **Pending Tasks**.

-OR- From the **View** menu, select **Go To**, and then **Tasks**. -OR- F4

2 Highlight the appropriate record.

3 Click **Open Task** on the toolbar.

-OR- Right click and select **Open Task**. -OR- CTRL+F4

4 Click **Print** at the bottom of the screen.

Print a List of Tasks

➢ ***To print a list of pending tasks***

1 Click on the **Main** bar in the *Navigation* pane and then **Pending Tasks**.

-OR- From the **View** menu, select **Go To**, and then **Tasks**. -OR- F4

2 From the **File** menu, select **Print Grid**.

3 Click **OK** to print.

Program Activities

Program Activities record tasks completed towards a case. Each program activity has an *Activity Type* (see "Activity Types" on page 117). Selecting *Information & consultation to individuals* as the activity *Type* creates a *Referral*. You can manage referrals in *Program Activities* or in the ***Referrals*** (see "Creating Referrals" on page 51) section of OmbudsManager.

You can schedule a *Due date* for any program activity. Incomplete activities appear in ***Pending Tasks*** (see "Managing Pending Tasks" on page 55) to make activities easier to manage and schedule.

Using the Activities Filter

Use the referral filter to limit the number of referral records on the screen. To clear the referral screen filter, click **Clear All** in step 3.

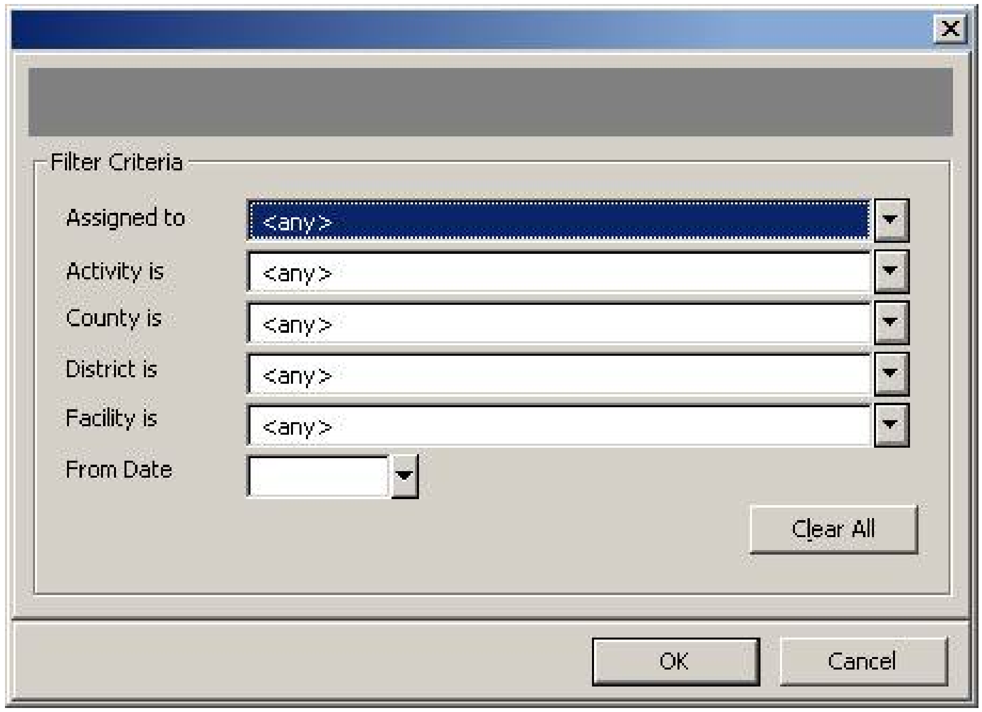
➢ *To limit the number of records on the activities screen*

1 Click on the **Main** bar in the *Navigation* pane and then on **Program Activities**.

-OR- From the **View** menu, select **Go To**, and then **Activities**. -OR- F5

2 Click **Filter** on the toolbar.

-OR- Right click and select **Filter**.



3 Select any one or more of the filter criteria. The activities displayed in the filtered view will meet all of the criteria you selected.

4 When finished, click **OK**.

Adding a New Activity Record

To create a new activity without accessing the *Program Activities* area, click on the down arrow to the right of the **New** button and select **New Program Activity**. Pressing CTRL+O also creates a new program activity from any section of OmbudsManager.

NORS Reporter will extract completed "Ombudsman Activities" from the information completed on this screen, including the top 3 training and consultation topics and un-duplicated count of Board And Care and Nursing Facilities (type) visited.

➢ ***To create a new activity record***

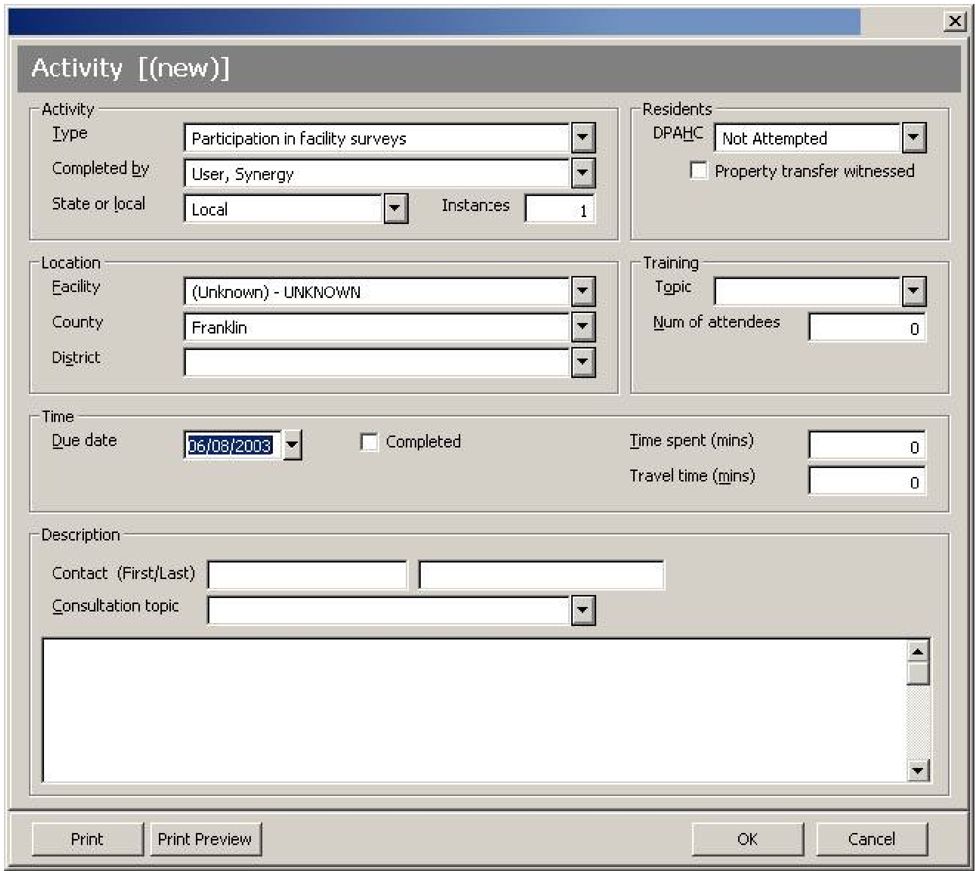
1 Click on the **Main** bar in the *Navigation* pane and then on **Program Activities**.

-OR- From the **View** menu, select **Go To**, and then **Activities**. -OR- F5

2 Click **New** on the toolbar.

-OR- Right click and select **New Activity**. -OR- CTRL+O

3 Select an activity *Type*. Selecting *Information & consultations* to individuals in *Type* creates a ***referral*** (see "Creating Referrals" on page 51). You can also define new activity types for OmbudsManager. Enter a *Due date* if appropriate. Check *Completed* if you have already finished this activity. Incomplete activities appear in ***Pending Tasks*** (see "Managing Pending Tasks" on page 55) automatically.



4 Enter other relevant information for this activity, including choosing a *Facility* and a *Description*.

5 When finished entering information for the activity, click **OK**.

Edit a Program Activity

You can also edit incomplete activities in ***Pending Tasks*** (see "Managing Pending Tasks" on page 55).

➢ *To modify a program activity*

1 Click on the **Main** bar in the *Navigation* pane and then on **Program Activities**.

-OR- From the **View** menu, select **Go To**, and then **Activities**. -OR- F5

2 Highlight the appropriate record.

3 Click **Open** on the toolbar.

-OR- Right click and select **Edit Activity**. -OR- CTRL+F5

4 Enter any new information or modify existing data.

5 When finished, click **OK**.

Delete a Program Activity

➢ ***To delete a program activity***

1 Click on the **Main** bar in the *Navigation* pane and then on **Program Activities**.

-OR- From the **View** menu, select **Go To**, and then **Activities**. -OR- F5

2 Highlight the record you wish to remove.

3 Click **Delete Activity** on the toolbar.

-OR- Right click and select **Delete Activity**.

4 At the prompt, click **Yes** to continue or **No** to cancel.

Print an Activity

You can print an activity from the *Program Activities* list screen or from within the activity record. To preview the activity before it prints, click **Print Preview** instead of **Print** below. Then click **Print Report** to print and **Close** to close the preview screen.

➢ ***To print the details of an activity***

1 Click on the **Main** bar in the *Navigation* pane and then on **Program Activities**.

-OR- From the **View** menu, select **Go To**, and then **Activities**. -OR- F5

2 Highlight the appropriate record.

3 On the toolbar, click **Print**.

-OR- From the **File** menu, select **Print**. -OR- CTRL+P

------------------------ OR ------------------------

1 Click on the **Main** bar in the *Navigation* pane and then on **Program Activities**.

-OR- From the **View** menu, select **Go To**, and then **Activities**. -OR- F5

2 ***Create a new activity*** (see "Adding a New Activity Record" on page 58) or ***edit an existing one*** (see "Edit a Program Activity" on page 59).

3 Click **Print** at the bottom of the screen.

Print a List of Activities

Use a ***filter*** (see "Using the Activities Filter" on page 57) to narrow down the list of activities, if necessary.

➢ ***To print a list of activities***

1 Click on the **Main** bar in the *Navigation* pane and then on **Program Activities**.

-OR- From the **View** menu, select **Go To**, and then **Activities**. -OR- F5

2 From the **File** menu, select **Print Grid**.

3 Click **OK** to print.

Reports

OmbudsManager gives you flexibility in creating reports with an emphasis on three different areas: Complaint Tracking, Facility Tracking, and Program reports.

- *Complaint Tracking* reports give detailed listings of complaints processed, offering many grouping views including by Facility, Program, Category and Ombudsman
- *Facility Tracking* reports allow for the identification of specific issues at Facilities and also tracks facility related activities as performed for each registered facility.
- *Program Reports* give you overview information regarding programs in the OmbudsManager database. Summary information on Program activities, complaints processed and overall resolution of those complaints.

Using the Report Screen

General Report Features and Types

OmbudsManager utilizes the powerful reporting features of *Seagate Crystal Reports*™. These reports offer many features including access to detailed information from within the report window, charting and exporting.

- *Drill-Down* - enables the user to create overview reports and access underlying detailed information without changing the report criteria. Whenever drill-down information is available, the mouse cursor will change to a magnifying glass. Double-clicking on an area with a magnifying glass will generate an additional detailed report inside the Report window.
- *Sub-Report Linking* - open detailed separate reports from within the report window. Whenever sub-report linking is available, the text will appear in navy blue and the mouse cursor will change to a pointer. Clicking this area will cause a case report to appear in a separate window:
- *Cross Tab* - displays information grouped in rows or columns of data. *Cross Tab* reports generally do not support *Drill Down* or *Sub–Report* linking.

Using the Report Toolbar

When drill-down or sub-report linking is available, a tab control along the top will indicate the reports that are currently open. Each tab represents an individual report. When you click **Print** only the currently viewed tab report is printed.

First row of the Report toolbar, from left to right

- Close - remove the report preview screen from view.
- Set Report Options - allows you to access report filters, layout options, and date range information. Change them as needed so you do not need to rerun the report if something doesn't look right. Click Refresh after to update the report with the criteria changes.
- Percent pull-down - the zoom percentage of the report. Use to zoom in or out of the report.
- Print Report - send the report to the default Windows® printer or the one specified in Print Setup.
- Print Setup - select a printer, page size, and page orientation.
- Refresh - force the program to re-run the report with current criteria and data.

Second row of the Report toolbar, from left to right

- Export (Envelope) - you can export the file into many different formats including PDF, CSV (Comma Separated Values), Excel Spreadsheets, HTML, Tab Separated Values, Word for Windows, and Text only formats.
- Find (Binoculars) - search for a string of text in the report.

Report Summaries

The following is a list of reports currently available in OmbudsManager and their key features.

- Case Breakdown on Resident Age - displays resident's age counts for closed cases within a date range.
- Case Breakdown on Resident Gender - resident gender counts for closed case withing a date range.
- Case Journal Time Summary - cross-tab of journal entries with total hours, case count and entry count, by month, by the staff member who made the entries between the range of start date and end date. The report is grouped by Program. Report can be run for one program or all, one staff member or all, additional filtering includes limiting the cases summarized to those dealing with facilities in specific counties or districts.
- Case Services Report - lists services and providers for cases within a specified date range.
- Cases Due For Review - detailed listing of complaint cases due for review with sub-report linking to case report. Can be run for a specified date range for one ombudsman or all, and for facilities in specified districts or counties.
- Complaint Analysis By Complaint Code (1-128) - drill down report for one program or all, one facility or all, by a selected date range of cases opened. Complaints by major and minor complaint code with facility type totals. Bar graph of complaints by Major category. Cross-tab of A-P by facility-type.
- Complaint Analysis By Complaint Code (Q Others) - drill down report for one program or all, one facility or all, by a selected date range of cases opened. Complaints by major and minor complaint code with facility type totals.
- Complaint Analysis By Facility - drill down report for one program or all, one facility or all, by a selected date range of cases opened. Complaint analysis with facility type totals. Interactive report filtering by facility. Sub-report linking to case file report.
- Complaint Analysis By Resident Age - drill down report for one program or all, one facility or all, by a selected date range of cases opened. Complaint analysis by resident pay status. Bar graph of complaints by pay status. Sub-report linking to case file report.
- Complaint Analysis By Complainant Role - drill down report for one program or all, one facility or all, by a selected date range of cases opened. Complaints by complainant role. Bar graph of complaints by complainant role. Sub-report linking to case file report.

- Complaint Analysis By Resident Race - drill down report for one program or all, one facility or all run by date range of cases opened. Complaints by resident race. Bar graph of complaints by resident race. Sub-report linking to case file report.
- Complaint Analysis By Resident Pay Status - drill down report for one program or all, one facility or all run by date range of cases opened. Complaints by resident pay status. Bar graph of complaints by pay status. Sub-report linking to case file report.
- Complaint Count By Facility Type & Complaint Type (1-128) - cross-tab report for one program or all run by date range of cases closed. Complaints by detailed facility-type and category. Line chart depicting complaint count by facility-type and major category.
- Complaint Count By Facility Type & Complaint Type (Others Cat. Q) - cross-tab report for one program or all run by date range of cases closed. Complaints by detailed facility-type of "Other" category.
- Complaint Deposition Report - complaints without dispositions.
- Daily Case Intake Log - summary of cases and complaints entered for a specific date.
- Facility Abuse and Neglect Report - cross-tab report that can be run for one program or all, one facility or all by a selected date range of case open date. Abuse Complaint total count by facility and resident pay status.
- Facility Complaint Summary - drill down report for one program or all, one facility or all, by a selected date range of cases opened. Facility Complaint Summary by major category. Sub-report linking to case file report.
- Facility Mailing Labels - mailing labels for facilities.
- Facility Summary Report - drill down report for one program or all, one facility or all, by a selected date range of cases opened. Detailed information on all facilities, regardless of care activity.
- Facility Visits Summary - cross-tab report for one program or all, one facility or all, one Ombudsman or all, by a selected date range of facility related activities completed. Additional filtering by district and county. Ombudsman Facility-Related activity participation count by quarter.
- Journal Details Report - detailed listing of all journal entries entered between Start Date and End Date, grouped by Program, Program Staff, and Case Number.
- Non Complaint Case Report - lists cases without complaints.
- Ombudsman Complaint Summary - drill down report for one program or all, one ombudsman or all, by a selected data range of cases opened. Analysis of complaint resolution by monthly periods. Sub-report linking to case file report.

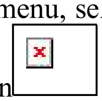
- Ombudsman Facility Activity Report - drill down report for one program or all, one facility or all, one Ombudsman or all, run by date range of facility related activities completed. Grouped by Program and month of completion. Summary and Detailed view available.
- Open Complaint Listing By Case Number - detailed listing of all open complaint cases by Case ID.
- Open Complaint Listing By Facility - detailed listing of all open complaint cases by Facility for one or all. Optional filtering by facility district.
- Open Complaint Listing By OMB - detailed listing of all open complaint cases by ombudsman for one or all. Optional filtering by facility district.
- Pending Activity Report - detailed listing of all activities scheduled to occur between a date range that have yet to be completed.
- Program Abuse and Neglect Report - cross-tab report that can be run for one program or all, one facility or all by a selected date range of case open date. Complaints by code & program, complaint categories by abuser age, complaint categories by abuser gender.
- Program Activity Report - cross-tab report for one program or all, one Ombudsman or all run by date range.

Running a Report

In order to run a report, your username must have *Run Report* permission. In addition, OmbudsManager can restrict reports to Supervisor usernames. Supervisor usernames either have global access (Supervisor Access) or have been marked as a *Supervisor* in the *Staff Details* section of the user record. See ***Assigning Username Permissions*** (on page 100) and ***Securing Reports*** (on page 105) for more information.

➢ *To run an OmbudsManager report*

1 In the *Navigation* pane, click on the **Main** bar. Then click **Reports**.

-OR- From the **View** menu, select **Go To** and then **Reports**. -OR- F6 -OR- Click the **Reports** icon  on the toolbar.

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2 Highlight the report you wish to run. See ***Report Summaries*** (on page 66) for more information on individual reports.

3 Click **Print** or **Print Preview** on the toolbar. **Print Preview** will allow you to study the report before sending it to the print.

-OR- Double click on the report.

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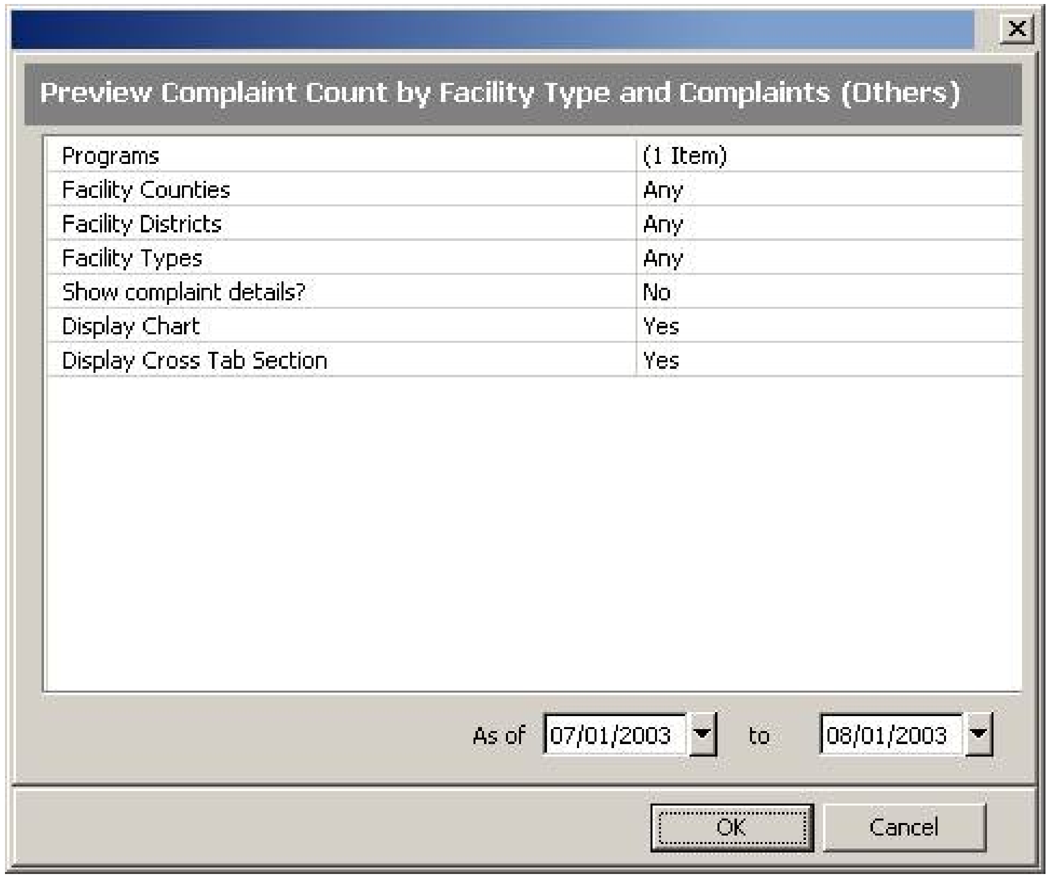
4 OmbudsManager will displays a screen that allows you to select filters to limit the type of data found on the report. You can also usually select report detail level, layout options, and a date range.



5 When finished selecting criteria, click **OK**.

6 If selected **Print** in step three, OmbudsManager will send the report to your default Windows® printer.

7 If you select **Print Preview**, use the *Report* toolbar to navigate through the report. Click **Print Report** when you are ready to print and **Close** to get rid of the report preview screen. Please see ***Using the Report Screen*** (on page 64) for details on using this screen.

Table Maintenance

All case records are linked with *Facility*, *Residents*, *Complainants*, and *Perpetrators* records. OmbudsManager provides a way to create and edit *Facility*, *Resident*, and *Complainant* records from within a ***case record*** (see "Case Data Entry" on page 26). *Tables* in OmbudsManager provide a way of managing case associated records without entering a case file. Perpetrator and Facility Owner records are managed only through *Tables*. Use the procedures outlined in this section to add, edit, and remove *Facilities*, *Residents*, *Complainants*, *Perpetrator*, and *Facility Owners*.

Facilities

OmbudsManager provides tools to manage facility lists and related activities outside of case records. Managing facility lists outside of cases will allow you to keep accurate, up to date information. The Contact History screen will allow you to view and schedule activities as needed.

Facility information can be added or modified while entering a case data. You may, however, find it more convenient to update facility information outside of the complaint case entry area as outlined in this section.

Filtering the Facilities List

➢ ***To limit the number of records in view on the Facilities list screen***

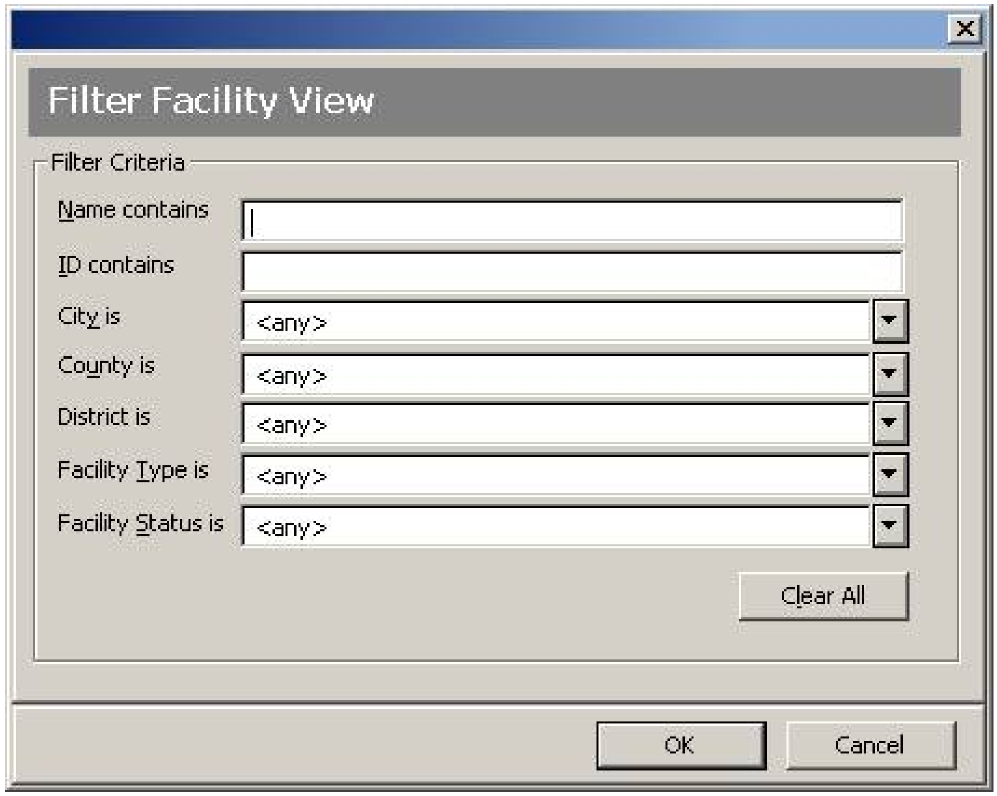
1 Click on the **Tables** bar in the *Navigation* pane. Then click on **Facilities**.

-OR- From the **View** menu, select **Go To**, and then **Facilities**. -OR- F7

2 Click **Filter** on the *Toolbar*.

-OR- Select **Filter** from the **Facilities** menu.

3 Select the criteria you would like to filter for and click **OK**.



4 If zero case files meet the filter criteria, you will be notified. Otherwise the *Filter Facility View* screen will close and the *Facilities* list screen will display only the facilities that match all of the criteria entered.

Adding a Facility

You can also create a facility while entering case information. Please see ***Entering Cases*** (on page 21) for more information.

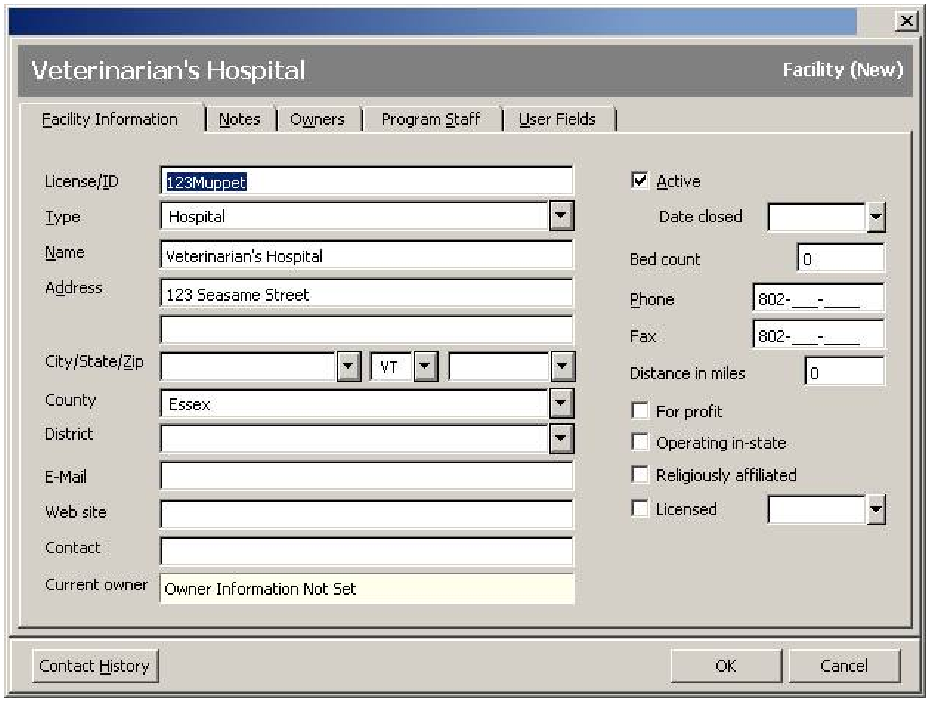
➢ *To add a facility outside of a case record*

1 Click on the **Tables** bar in the *Navigation* pane. Then click on **Facilities**.

-OR- From the **View** menu, select **Go To**, and then **Facilities**. -OR- F7

2 Click **New Facility** on the toolbar.

-OR- Select **New Facility** from the **Facilities** menu. -OR- CTRL+J



3 Enter the facility's *License/ID* number as defined by your state Ombudsman agency. If you do not know what to enter for an identifier, check with your program manager.

4 Type in the facility *Name* and select a facility *Type* from the pull down. *Facility License/ID*, *Name*, and *Type* are required before a new facility record can be saved.

5 Use the **Facility Information**, **Notes**, **Owners**, **Program Staff**, and **User Fields** tabs to add more data to the facility record. Please see ***Entering Facility Information*** (on page 73) for details.

6 When finished, click **OK** to save and close the facility screen.

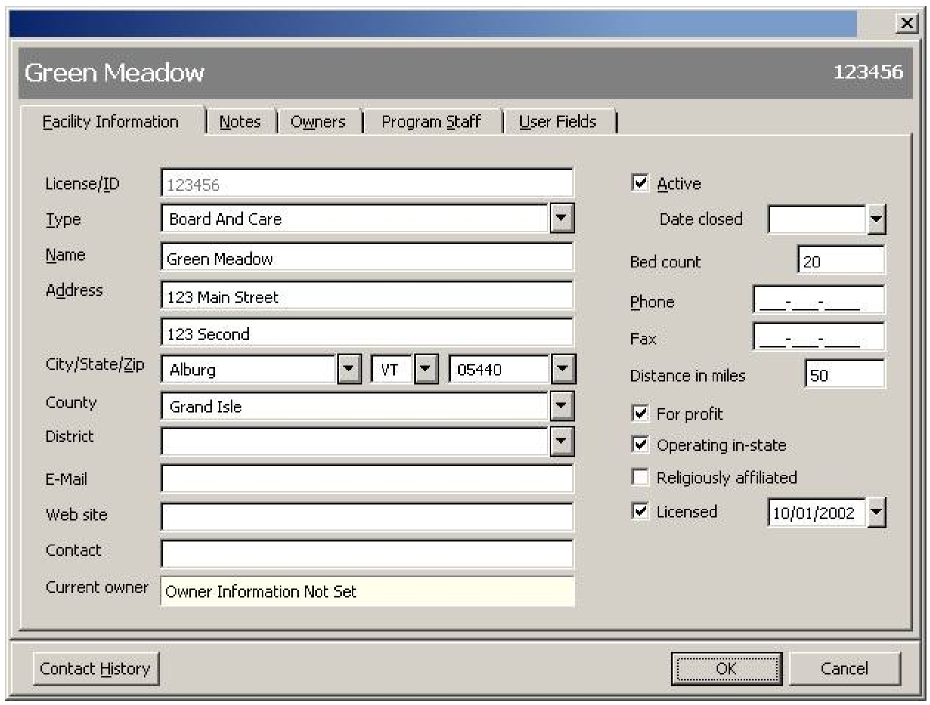
Entering Facility Information

Entering Facility Information describes how to enter data into the five sections of a facility record. The **Facility Information** section stores address and contact information, *Bed count*, *Facility License/ID*, and *Type*. Enter comments or notes about a facility under **Notes**. The **Owners** section tracks past and current facility ownership. View program staff assignments to the facility under **Program Staff**. If you need to store customized data about a facility, enter the information in the **User Fields** section.

Facility Information

➢ *To modify facility information*

1. ***Create a new facility record*** (see "Adding a Facility" on page 72) or ***edit an existing one*** (see "Changing Facility Information" on page 82).
2. If necessary, click **Facility Information**.
3. If this is a new facility, enter the *License/ID* number as defined by your state Ombudsman agency. If you do not know what to enter for an identifier, check with your program manager. You cannot change a *License/ID* number for an existing facility.



4. Select a facility *Type* and enter or change the *Name* as needed. A facility *License/ID*, *Type* and *Name* are needed to save a facility record. The *Type* pull down is customizable - see ***Facility Types*** (on page 115) for more information.
5. Enter *Address* information and *Phone* and *Fax* numbers as known. The *Distance in miles* indicates the approximate driving distance from the office to the facility. Select the appropriate *County* and *District*.
6. Type in a *Bed count* and enter a *Date closed* as appropriate.
7. Type in a facility *E-Mail*, *Web site,* and *Contact* as needed.
8. Check the appropriate boxes: *For profit*, *Operating in-state*, *Religiously affiliated*, and *Licensed*. If the facility is *Licensed*, enter the date of licensing.
9. Click one of the other tabs to enter more information or click **OK** to save and close the facility screen.

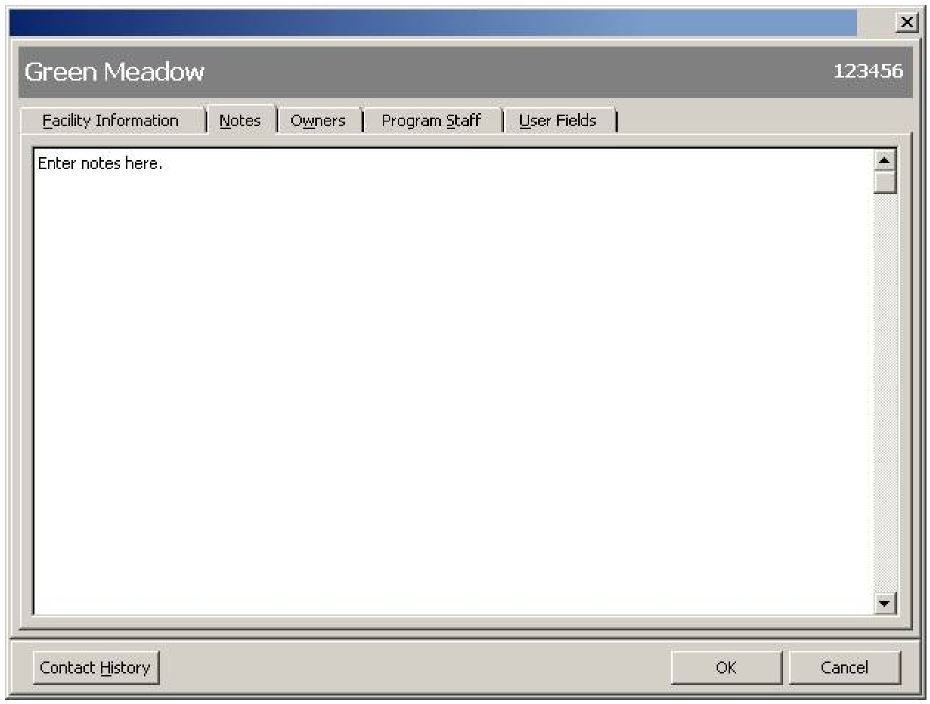
Notes

Store comments or notes on a facility in *Notes*.

➢ *To add or modify notes about a facility*

1 ***Create a new facility record*** (see "Adding a Facility" on page 72) or ***edit an existing one*** (see "Changing Facility Information" on page 82).

2 Click on the **Notes** tab.



3 Add or modify any comments about the facility.

4 Click one of the other tabs to enter more information or click **OK** to save and close the facility screen.

Owners

OmbudsManager can track facility ownership over time. Ownership information allows Ombudsman programs to create a historical view of poor facility practices at a ownership level.

Add a New Owner

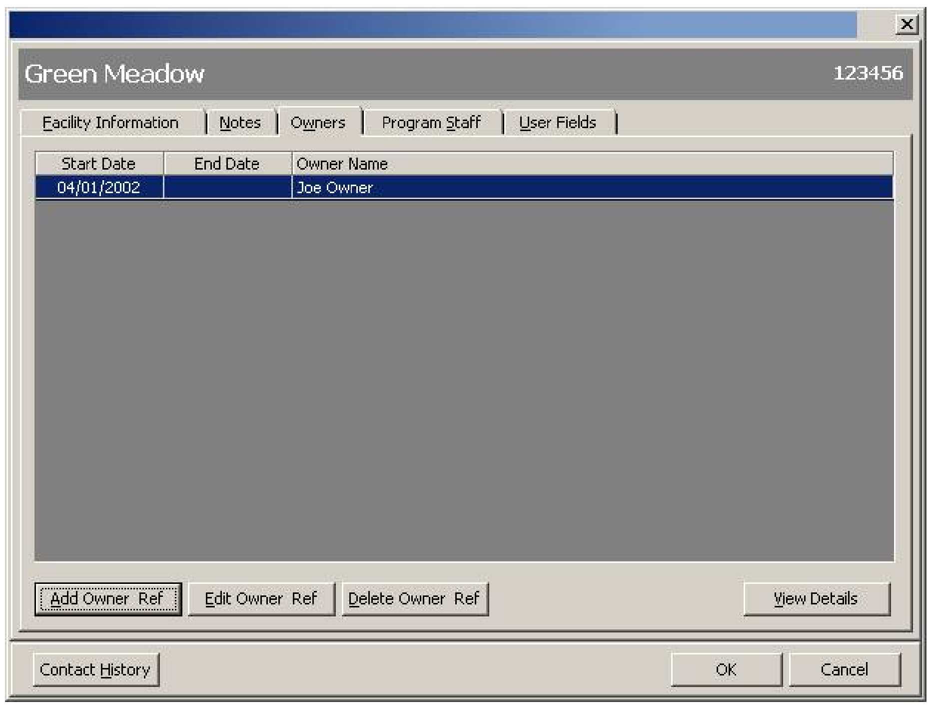
If an owner already exists for the facility, edit their record and add an *End Date* of their ownership. Then follow the procedure below to add the new owner.

A facility can have more than one active owner. An active owner has a blank *End Date*. Simply repeat the procedure below until you have added all current facility owners.

➢ *To add a new owner to a facility*

1 ***Create a new facility record*** (see "Adding a Facility" on page 72) or ***edit an existing one*** (see "Changing Facility Information" on page 82).

2 Click on the **Owners** tab.



3 Click **Add Owner Ref**.

4 Select an *Owner* name and enter a *Start Date*.

If you do not see the owner that you need, click **Cancel**. Click on the **Facility Owners** icon in the *Navigation* pane to add the owner to OmbudsManager. Please see ***Create a Facility Owner*** (on page 93) for details. Return to the facility record and start from step 2 again.

5 Click **OK**.

Modify an Owner

Add an *End Date* to an owner to record the end of their ownership of a facility.

➢ *To change an owner associated with a facility*

1 Click on the **Tables** bar in the *Navigation* pane. Then click on **Facilities**.

-OR- From the **View** menu, select **Go To**, and then **Facilities**. -OR- F7

2 Highlight the appropriate record. Create a ***Filter*** (see "Filtering the Facilities List" on page 71) to limit the number of records in view as needed.

3 Click **Open** on the toolbar.

-OR- Right click and select **Edit Facility**. -OR- Select **Open Facility Record** from the **Facilities** menu. -OR- CTRL+F7

4 Click on the **Owners** tab.

5 Highlight the record you want to change.

6 Click **Edit Owner Ref**.

7 Select a new *Owner name*, *Start Date*, and/or *End Date* as need.

If you do not see the owner that you need, click **Cancel**. Click on the **Facility Owners** icon in the *Navigation* pane to add the owner to OmbudsManager. Please see ***Create a Facility Owner*** (on page 93) for detailed information. Return to the facility record and start from step 4.

8 When finished, click **OK**.

Remove an Owner

OmbudsManager can keep historial records of ownership at a facility. To use this feature, ***add an End Date to the existing owner record*** (see "Modify an Owner" on page 77) when the facility changes hands. If you delete the record, you will lose the history associated the facility.

➢ *To remove an owner from a facility record*

1 Click on the **Tables** bar in the *Navigation* pane. Then click on **Facilities**.

-OR- From the **View** menu, select **Go To**, and then **Facilities**. -OR- F7

2 Highlight the appropriate record. Create a ***Filter*** (see "Filtering the Facilities List" on page 71) to limit the number of records in view as needed.

3 Click **Open** on the toolbar.

-OR- Right click and select **Edit Facility**. -OR- Select **Open Facility Record** from the **Facilities** menu. -OR- CTRL+F7

4 Click on the **Owners** tab.

5 Highlight the record you wish to remove.

6 Click **Delete Owner Ref**.

7 At the prompt, click **Yes** to continue or **No** to cancel.

Viewing Owner Details

You can view and edit detailed owner information and see an owner's facility list in a facility record.

➢ ***To view detailed owner information***

1 Click on the **Tables** bar in the *Navigation* pane. Then click on **Facilities**.

-OR- From the **View** menu, select **Go To**, and then **Facilities**. -OR- F7

2 Highlight the appropriate record. Create a ***Filter*** (see "Filtering the Facilities List" on page 71) to limit the number of records in view as needed.

3 Click **Open** on the toolbar.

-OR- Right click and select **Edit Facility**. -OR- Select **Open Facility Record** from the **Facilities** menu. -OR- CTRL+F7

4 Click the **Owners** tab.

5 Highlight the record you wish to view.

6 Click **View Details**.

7 In **Owner Information,** view and change information as needed.

8 To see a list of facilities owned by this particular owner, click **Facility Summary**.

9 When finished viewing, click **OK**.

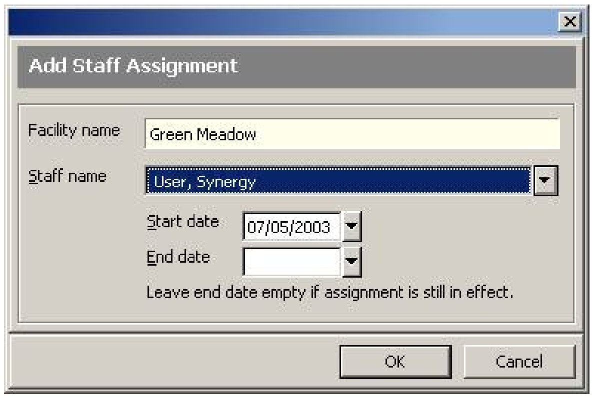
Program Staff

You can assign staff from your program to work with a particular facility. OmbudsManager can keep record over time of staff assignments to a facility.

Assign Staff to a Facility

➢ *To assign staff to facility*

1. ***Create a new facility record*** (see "Adding a Facility" on page 72) or ***edit an existing one*** (see "Changing Facility Information" on page 82).
2. Click on the **Program Staff** tab.
3. Click **Add Assignment**.



4. Select a *Staff name* and *Start date*. Leave the *End date* blank if the staff member is still assigned to the facility.

   If you do not see the staff member you need, click **Cancel**. Access the *Staff/Users* area in *System Admin* to create a new staff/user record. See ***Adding New Usernames*** (on page 101) for more details. Return to the facility record and start step 2 again to assign the new user to the facility.
5. Click **OK**.

Edit an Assignment

➢ *To modify an existing staff assignment*

1. Click on the **Tables** bar in the *Navigation* pane. Then click on **Facilities**.

   -OR- From the **View** menu, select **Go To**, and then **Facilities**. -OR- F7
2. Highlight the appropriate record. Create a ***Filter*** (see "Filtering the Facilities List" on page 71) to limit the number of records in view as needed.
3. Click **Open** on the toolbar.

   -OR- Right click and select **Edit Facility**. -OR- Select **Open Facility Record** from the **Facilities** menu. -OR- CTRL+F7
4. Click on the **Program Staff** tab.
5. Highlight the record you want to change.
6. Click **Edit Assignment**.
7. Change the *Staff name*, *Start date*, and/or *End date* as needed.

If you do not see the staff member you need, click **Cancel**. Access the *Staff/Users* area in *System Admin* to create a new staff/user record. See ***Adding New Usernames*** (on page 101) for more detailed information. Return to the facility record and start step 2 again to assign the new user to the facility.

8 When finished making changes, click **OK**.

Remove an Assignment

If an assignment has ended for a program staff member, add an *End date* to the assignment instead of removing it. Keeping program staff assignment records gives you a record of time of who has worked with the facility and when.

➢ ***To delete an assignment record from a facility***

1 Click on the **Tables** bar in the *Navigation* pane. Then click on **Facilities**.

-OR- From the **View** menu, select **Go To**, and then **Facilities**. -OR- F7

2 Highlight the appropriate record. Create a ***Filter*** (see "Filtering the Facilities List" on page 71) to limit the number of records in view as needed.

3 Click **Open** on the toolbar.

-OR- Right click and select **Edit Facility**. -OR- Select **Open Facility Record** from the **Facilities** menu. -OR- CTRL+F7

4 Highlight the record you wish to remove.

5 Click **Delete Assignment**.

6 At the prompt, click **Yes** to continue or **No** to cancel.

User Fields

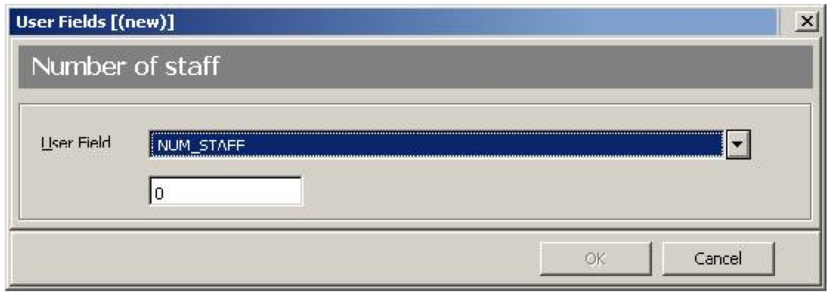
User Fields store data about a facility that has no other place in the facility record. You customize the user fields for your data. This section outlines how to enter data into existing user fields. Please see ***User Fields*** (on page 128) for details on creating user fields.

Add a User Field Record

➢ ***To create a user field record***

1 ***Create a new facility record*** (see "Adding a Facility" on page 72) or ***edit an existing one*** (see "Changing Facility Information" on page 82).

2 Click on the **User Fields** tab.



3 Click **Add Field**.

4 Select a *User Field*.

5 New fields will appear where you are supposed to enter data. Type in the appropriate data.

6 Click **OK**.

Modify a User Field Record

➢ *To edit a user field record*

1 Click on the **Tables** bar in the *Navigation* pane. Then click on **Facilities**.

-OR- From the **View** menu, select **Go To**, and then **Facilities**. -OR- F7

2 Highlight the appropriate record. Create a ***Filter*** (see "Filtering the Facilities List" on page 71) to limit the number of records in view as needed.

3 Click **Open** on the toolbar.

-OR- Right click and select **Edit Facility**. -OR- Select **Open Facility Record** from the **Facilities** menu. -OR- CTRL+F7

4 Click on the **User Fields** tab.

5 Highlight the record you want to change.

6 Click **Edit Field**.

7 Select a new *User Field* or change the existing data. If you select a new *User Field*, new fields will appear on the screen for data entry. Enter the appropriate data into the fields.

8 When finished, click **OK**.

Delete a User Field Record

➢ *To remove a user field record from a facility*

1 Click on the **Tables** bar in the *Navigation* pane. Then click on **Facilities**.

-OR- From the **View** menu, select **Go To**, and then **Facilities**. -OR- F7

2 Highlight the appropriate record. Create a ***Filter*** (see "Filtering the Facilities List" on page 71) to limit the number of records in view as needed.

3 Click **Open** on the toolbar.

-OR- Right click and select **Edit Facility**. -OR- Select **Open Facility Record** from the **Facilities** menu. -OR- CTRL+F7

4 Click on the **User Fields** tab.

5 Highlight the record you wish to remove.

6 Click **Delete Field**.

7 At the prompt, click **Yes** to continue or **No** to cancel.

Changing Facility Information

➢ ***To modify a facility outside of a case record***

1 Click on the **Tables** bar in the *Navigation* pane. Then click on **Facilities**.

-OR- From the **View** menu, select **Go To**, and then **Facilities**. -OR- F7

2 Highlight the appropriate record. Create a ***Filter*** (see "Filtering the Facilities List" on page 71) to limit the number of records in view as needed.

3 Click **Open** on the toolbar.

-OR- Right click and select **Edit Facility**. -OR- Select **Open Facility Record** from the **Facilities** menu. -OR- CTRL+F7

4 Modify the *Active* status by using the check box. Make other changes as needed using the tabbed sections of the facilities record. See ***Enter Facility Information*** (see "Entering Facility Information" on page 73) for more information.

5 When finished, click **OK**.

Delete a Facility

Your username will need special permission to delete a facility. Only usernames with supervisor authority or *Can Delete Facilities* permission can remove a facility record. For more information on username permissions, please see ***Assigning Username Permissions*** (on page 100)

Any facilities associated ***with a case*** (see "Complainant/Facility/Resident" on page 33) or with ***program activities*** (on page 57) cannot be deleted. To remove a facility from selection lists, you can ***deactivate the record*** (see "Changing Facility Information" on page 82) instead of deleting it.

➢ *To permanently delete facility information*

1 Click on the **Tables** bar in the *Navigation* pane. Then click on **Facilities**.

-OR- From the **View** menu, select **Go To**, and then **Facilities**. -OR- F7

2 Highlight the record you wish to remove. Use a ***Filter*** (see "Filtering the Facilities List" on page 71), if necessary, to narrow down the list.

3 Click **Delete Facility** on the toolbar.

-OR- Right click and select **Delete Facility**. -OR- From the **Facilities** menu, select **Delete Facility Record**.

4 At the prompt, click **Yes** to continue or **No** to cancel.

Using Contact History

The *Contact History* screen allows you to view and print activities associated with a specific facility. You can also create and manage activities from the *Contact History* screen.

➢ *To view and print the contact (activity) history for a facility*

1 Click on the **Tables** bar in the *Navigation* pane. Then click on **Facilities**.

-OR- From the **View** menu, select **Go To**, and then **Facilities**. -OR- F7

2 Highlight the appropriate record. Create a ***Filter*** (see "Filtering the Facilities List" on page 71) to limit the number of records in view as needed.

3 Click **Open** on the toolbar.

-OR- Right click and select **Edit Facility**. -OR- Select **Open Facility Record** from the **Facilities** menu. -OR- CTRL+F7

4 Click **Contact History** on the toolbar.

-OR- Select **Contact History** from the **Facilities** menu. -OR- Click **Contact History** on the facilities screen. -OR- CTRL+H

5 If you'd like a print out of the Contact History, click **Print Grid** at the bottom of screen.

6 When finished, click **OK**.

➢ *To add a new activity from the Contact History screen*

1 Click on the **Tables** bar in the *Navigation* pane. Then click on **Facilities**.

-OR- From the **View** menu, select **Go To**, and then **Facilities**. -OR- F7

2 Highlight the appropriate record. Create a ***Filter*** (see "Filtering the Facilities List" on page 71) to limit the number of records in view as needed.

3 Click **Open** on the toolbar.

-OR- Right click and select **Edit Facility**. -OR- Select **Open Facility Record** from the **Facilities** menu. -OR- CTRL+F7

4 Click **Contact History** on the toolbar.

-OR- Select **Contact History** from the **Facilities** menu. -OR- Click **Contact History** on the facilities screen. -OR- CTRL+H

5 Click **Add New**.

6 Select an activity *Type*. Selecting *Information & consultations* to individuals in *Type* creates a ***referral*** (see "Creating Referrals" on page 51). You can also define ***new activity types*** (see "Activity Types" on page 117) for OmbudsManager. Enter a *Due date* if appropriate. Check *Completed* if you have already finished this activity. Incomplete activities appear in ***Pending Tasks*** (see "Managing Pending Tasks" on page 55) automatically.

7 OmbudsManager will fill in the *Location* and *Facility* information automatically. Enter other data as needed.

8 When finished, click **OK**.

➢ *To edit or delete an activity using Contact History*

1 Click on the **Tables** bar in the *Navigation* pane. Then click on **Facilities**.

-OR- From the **View** menu, select **Go To**, and then **Facilities**. -OR- F7

2 Highlight the appropriate record. Create a ***Filter*** (see "Filtering the Facilities List" on page 71) to limit the number of records in view as needed.

3 Click **Open** on the toolbar.

-OR- Right click and select **Edit Facility**. -OR- Select **Open Facility Record** from the **Facilities** menu. -OR- CTRL+F7

4 Click **Contact History** on the toolbar.

-OR- Select **Contact History** from the **Facilities** menu. -OR- CTRL+H

5 Highlight the appropriate record.

6 To change the record, click **Edit**. Make an necessary changes and click **OK**.

7 To remove an activity record, click **Delete**. At the prompt, click **Yes** to continue or **No** to cancel.

8 Repeat steps five through seven as necessary.

9 When finished, click **OK** to close the **Contact History** screen.

Residents

OmbudsManager gives you two ways to manage resident records. When entering case information you can create and edit residents as needed. This section outlines how to use the separate *Residents* area to add, edit, deactivate, and remove resident records. This section also describes how to import client records from SAMS 3.0 to create new resident records.

Add a New Resident

➢ ***To create a new resident record in OmbudsManager***

1 Click on the **Tables** bar in the *Navigation* pane. Then click on **Residents**.

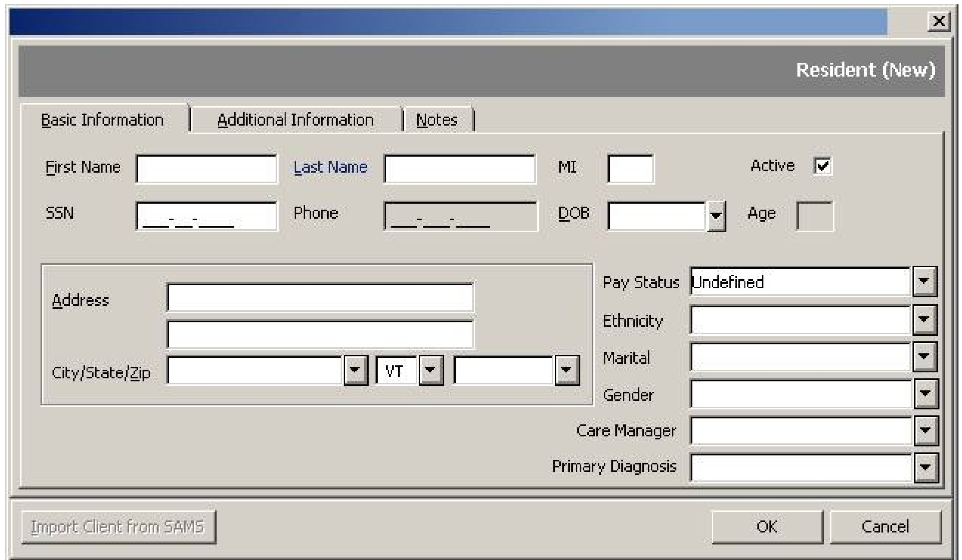
-OR- From the **View** menu, select **Go To**, and then **Residents**. -OR- F8

2 Click **New Resident** on the toolbar.

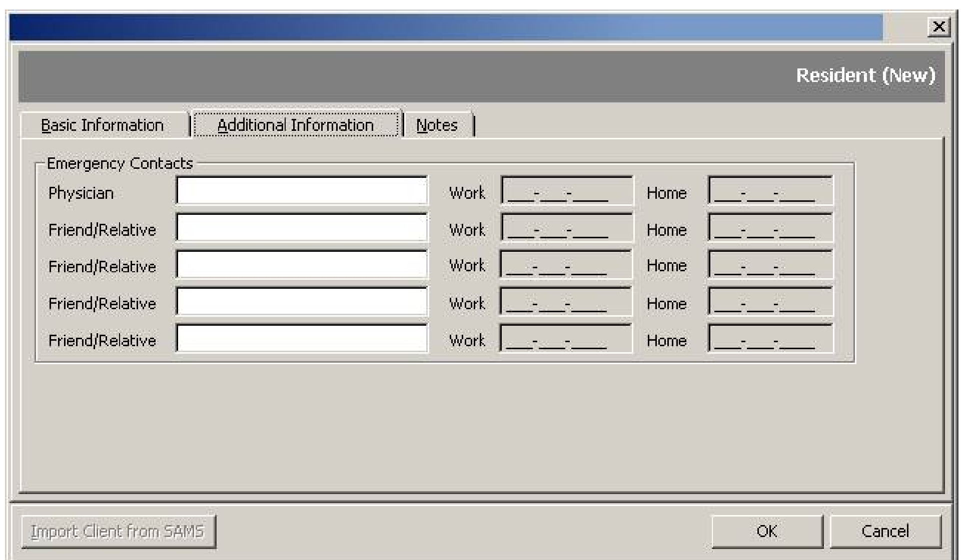
-OR- Right click and select **New Resident**. -OR- From the **Residents** menu, select **New Resident**. -OR- CTRL+L

3 Under the **Basic Information** tab, enter a *First Name*, *Last Name*, *MI*, *SSN, Phone* number, and DOB (Date of Birth). Type the address information in the lower left of the screen. Select a *Pay Status*, *Ethnicity*, *Marital (status)*, *Gender*, *Care Manager,* and *Primary Diagnosis* as known on the lower right.

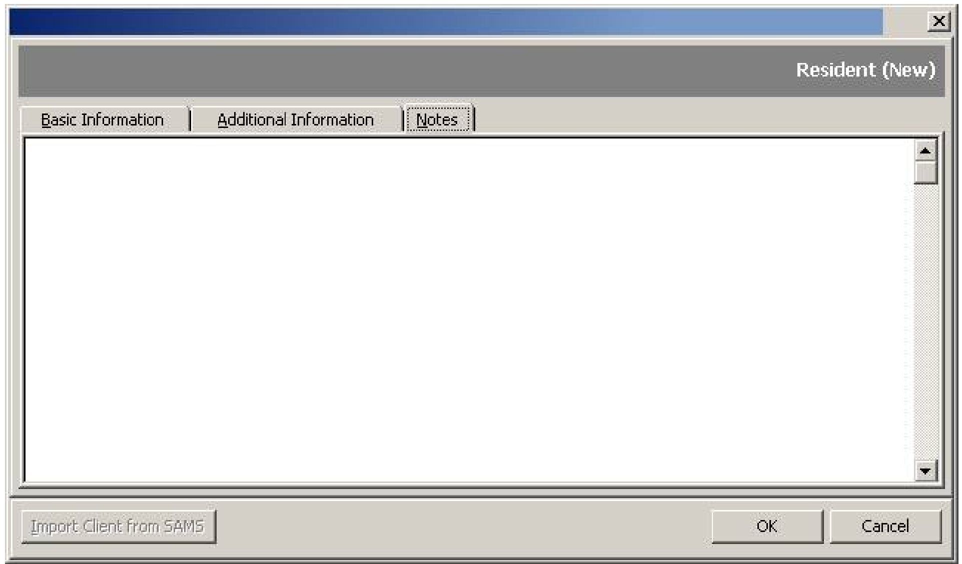
You can also import ***client data from SAMS 3.0*** (see "Import a New Resident from SAMS 3.0" on page 87) to create the resident record. To search a SAMS database for the client, click **Import Client from SAMS**. Search for the appropriate client record. Select the client record you need and click **OK**.



4 Click **Additional Information**. Enter important contact information including a *Physician* and up to 4 *Friend/Relative* contacts.



5 Click on the **Notes** tab. Type in notes as needed.



6 When finished, click **OK**.

Import a New Resident from SAMS 3.0

OmbudsManager can create a resident record by copying a client from a SAMS 3.0 database. Before you can import, you will need to ***run a one time setup*** (see "SAMS 3.0 Database Location" on page 97) to tell OmbudsManager the location of the SAMS 3.0 database.

SAMS2000 is currently not supported.

➢ *To import a SAMS 3.0 client to a new resident record*

1 Click on the **Tables** bar in the *Navigation* pane. Then click on **Residents**.

-OR- From the **View** menu, select **Go To**, and then **Residents**. -OR- F8

2 Click **New Resident** on the toolbar.

-OR- Right click and select **New Resident**. -OR- From the **Residents** menu, select **New Resident**. -OR- CTRL+L

3 Click **Import Client from SAMS**.

4 In *Import SAMS Client*, type in all or part of the *First Name*, *Last Name* and *M.I.* You do not need to enter data in all fields.

5 Click **Search SAMS**.

6 Select the client record you need. Uncheck the *Copy data from the selected SAMS record to new Resident record in OmbudsManager* box if all you want to copy is the name. Leave as is to pull all relevant information from SAMS 3.0 into the new resident record.

7 Click **OK**.

8 Click **Additional Information**. Enter important contact information including a *Physician* and up to 4 *Friend/Relative* contacts.

9 Click on the **Notes** tab. Type in notes as needed.

10 When finished, click **OK**.

Edit a Resident

➢ ***To change a resident record***

1 Click on the **Tables** bar in the *Navigation* pane. Then click on **Residents**.

-OR- From the **View** menu, select **Go To**, and then **Residents**. -OR- F8

2 Highlight the record you want to change.

3 Click **Open** on the toolbar.

-OR- Right click and select **Edit Resident**. -OR- From the **Residents** menu, select **Open Resident**. -OR- CTRL+F8

4 In **Basic Information**, view or change *name*, *SSN*, *Phone*, *DOB* (Date of Birth), and address information as needed. Select a *Pay Status*, *Ethnicity*, *Marital (status)*, *Gender*, *Care Manager*, and/or *Primary Diagnosis* if necessary. Use the check box to change the *Active* status.

5 Click **Additional Information** to change the contact information for the resident's *Physician* or *Friends/Relatives*.

6 To add or edit any comments about the resident's record, click **Notes**.

7 Click **OK** when you are finished.

Delete a Resident

You cannot delete residents associated with cases. ***Deactivate their record*** (see "Edit a Resident" on page 88) instead to remove their name from selection lists.

➢ ***To remove a resident from the database***

1 Click on the **Tables** bar in the *Navigation* pane. Then click on **Residents**.

-OR- From the **View** menu, select **Go To**, and then **Residents**. -OR- F8

2 Highlight the record you wish to remove.

3 Click **Delete Resident** on the toolbar.

-OR- Right click and select **Delete Resident**. -OR- From the **Residents** menu, select **Delete Resident**.

4 At the prompt, click **Yes** to continue or **No** to cancel.

Complainants

As with Residents and Facilities, you can also manage complainants from inside the cases screen. OmbudsManager offers a separate *Complaints* area to add, edit, deactivate, and remove records.

Add a New Complainant

➢ *To create a new complainant record*

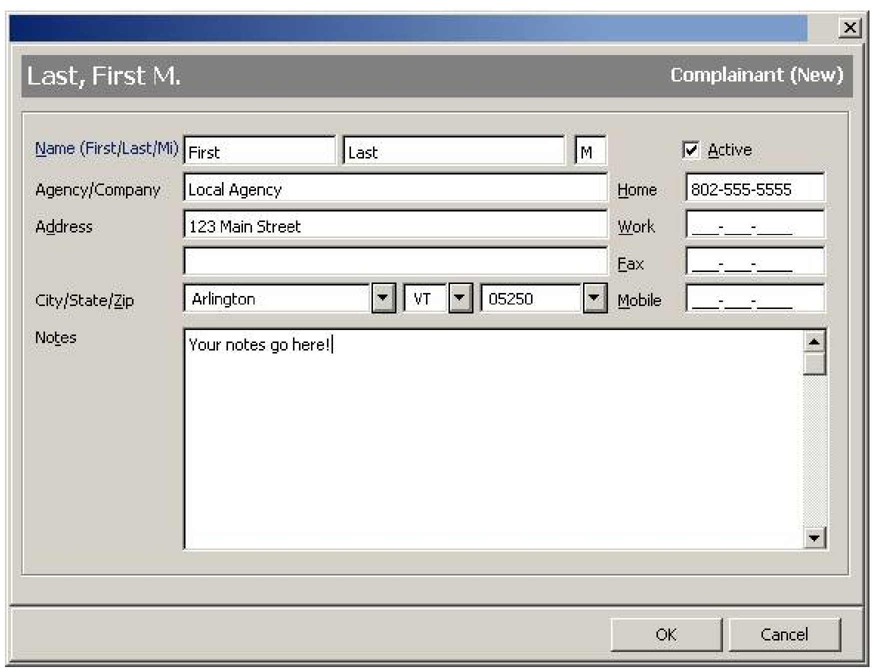
1 Click on the **Tables** bar in the navigation pane and then **Complainants**.

-OR- From the **View** menu, select **Go To**, and then **Complainants**. -OR- F9

2 Click **New Complainant** on the toolbar.

-OR- Right click and select **New Complainant**. -OR- CTRL+I

3 Enter *Name(First/Last/M)*, *Agency/Company*, *Address* information, phone numbers, and any *Notes* for this complainant. Use the pull down to select a city. The *ZIP Code* will fill in automatically. If there's more than one *ZIP Code* for the city, select the correct one. If you need to select a *City* in a *State* other than the default, select the *State* first, then the *City* and the *ZIP* last.



4 When finished entering complainant information, click **OK**.

Edit a Complainant

You can not modify or delete (Unknown/Anonymous) and (See Resident Info), the two OmbudsManager generated complainants.

➢ *To modify a complainant record*

1 Click on the **Tables** bar in the navigation pane and then **Complainants**.

-OR- From the **View** menu, select **Go To**, and then **Complainants**. -OR- F9

2 Highlight the appropriate record.

3 Click **Open** on the toolbar.

-OR- Right-click and select **Edit Complainant**. -OR- Select **Open Complainant** from the **Complainants** menu. -OR-CTRL+F9

4 Modify complainant *Name*, *Address*, *Phone*, and *Notes* as needed. Use the check box to change the *Active* status as needed.

5 Click **OK**.

Delete a Complainant

You can not modify or delete (Unknown/Anonymous) and (See Resident Info), the two OmbudsManager generated complainants. You can also not remove a complainant associated with a case. ***Remove the check from the Active box*** (see "Edit a Complainant" on page 90) to deactivate their record instead of deleting it.

➢ *To remove a complainant record*

1 Click on the **Tables** bar in the navigation pane and then **Complainants**.

-OR- From the **View** menu, select **Go To**, and then **Complainants**. -OR- F9

2 Highlight the record you wish to remove.

3 Click **Delete Complainant** on the toolbar.

-OR- Right click and select **Delete Complainant**.

4 At the prompt, click **Yes** to continue or **No** to cancel.

Perpetrator

Perpetrator allow to add, edit, and delete case perpetrator records.

Create a Perpetrator Record

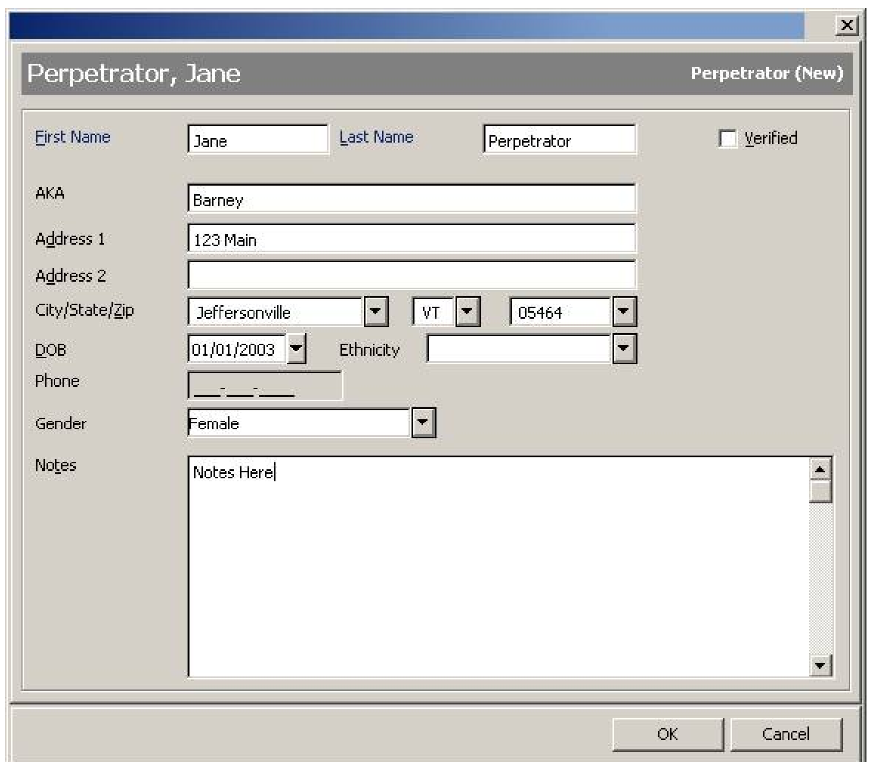
➢ ***To add a perpetrator record to OmbudsManager***

1 Click on the **Tables** bar in the *Navigation* pane. Then click on **Perpetrator**.

-OR- From the **View** menu, select **Go To**, and then **Perpetrators**. -OR- F10

2 Click **New Perpetrator**.

-OR- From the **Perpetrators** menu, select **New Perpetrator**. -OR- Right click and select **New Perpetrator**.



3 Enter the *First* and *Last Name*. Enter an *AKA* and *address information* as needed. Select *DOB* (Date of Birth), *Ethnicity*, and *Gender*. Enter a *Phone* number and *Notes*. Check the *Verified* box when the perpetrator name and address information has been checked.

4 Click **OK**.

Modify a Perpetrator Record

➢ ***To change an existing perpetrator record***

1 Click on the **Tables** bar in the *Navigation* pane. Then click on **Perpetrator**.

-OR- From the **View** menu, select **Go To**, and then **Perpetrators**. -OR- F10

2 Highlight the record you want to change.

3 Click **Open** on the toolbar.

-OR- Right click and select **Open Perpetrator**. -OR- From the **Perpetrators** menu, select **Open Perpetrator**.

4 Edit *Name*, *Verified*, address information, *DOB* (Date of Birth), *Ethnicity*, *Phone*, *Gender*, and any *Notes* as needed.

5 When finished, click **OK**.

Delete a Perpetrator Record

➢ ***To remove a perpetrator record from OmbudsManager***

1 Click on the **Tables** bar in the *Navigation* pane. Then click on **Perpetrator**.

-OR- From the **View** menu, select **Go To**, and then **Perpetrators**. -OR- F10

2 Highlight the record you wish to remove.

3 Click **Delete Perpetrator** on the toolbar.

-OR- Right-click and select **Delete Perpetrator**. -OR- From the **Perpetrators** menu, select **Delete Perpetrator**.

4 At the prompt, click **Yes** to continue or **No** to cancel.

Facility Owners

Facility Owners are managed separately from facilities. This allows OmbudsManager to report and track poor facility ownership. This section outlines how to create, modify, and remove facility owners.

Create a Facility Owner

➢ ***To add a facility owner to OmbudsManager database***

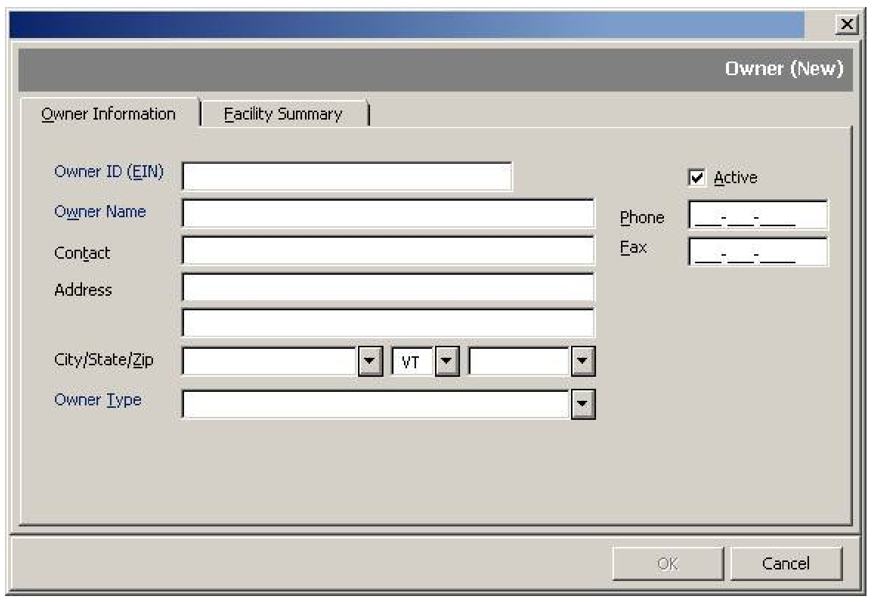
1 Click on the **Tables** bar in the *Navigation* pane. Then click on **Facility Owners**.

-OR- From the **View** menu, select **Go To**, and then **Facility Owners**. -OR- F11

2 Click **New Owner** on the toolbar.

-OR- Right click and select **New Facility Owner**. -OR- From the **Owners** menu, select **New Facility Owner**.

3 In **Owner Information**, enter in an *Owner ID (EIN)*, *Name*, alternate *Contact*, and address information along with a *Phone* and *Fax* number. The *Owner ID* cannot be changed after you click OK.



4 Select an *Owner Type*.

5 The **Facility Summary** is a read-only screen. See ***Facilities*** (on page 71) for more information on how to associate an owner with a facility.

6 When finished, click **OK**.

Modify a Facility Owner

➢ ***To edit an existing facility owner record***

1 Click on the **Tables** bar in the *Navigation* pane. Then click on **Facility Owners**.

-OR- From the **View** menu, select **Go To**, and then **Facility Owners**. -OR- F11

2 Highlight the record you want to change.

3 Click **Open** on the toolbar.

-OR- Right click and select **Edit Owner**. -OR- From the **Owners** menu, select **Edit Owner**. -OR- CTRL+F10

4 Change the *Owner Name*, *Contact*, address information, *Phone*, and *Fax* numbers as needed. You cannot change the Owner ID (EIN). Select a new *Owner Type* if necessary. Uncheck the *Active* box to deactivate the record, if appropriate.

5 Click **Facility Summary** to view all the facilities this owner is associated with.

6 Click **OK** when you are finished.

Delete a Facility Owner

You cannot remove an owner associated with a facility. ***Deactivate the record*** (see "Modify a Facility Owner" on page 93) instead to prevent the owner from appearing on selection lists.

➢ *To remove a facility record*

1 Click on the **Tables** bar in the *Navigation* pane. Then click on **Facility Owners**.

-OR- From the **View** menu, select **Go To**, and then **Facility Owners**. -OR- F11

2 Highlight the record you wish to remove.

3 Click **Delete Owner**.

-OR- Right click and select **Delete Owner**. -OR- From the **Owners** menu, select **Delete Owner**.

4 At the prompt, click **Yes** to continue or **No** to cancel.

Administering OmbudsManager

Setting Up For First Use

OmbudsManager can work as a stand-alone application or as networked multi-user application. Either way, when you first install OmbudsManager, you will be prompted to setup a *Program*. *Programs* filter data so that many Ombudsman offices may use the same database and easily roll information up to the state level. If you are using OmbudsManager in one office or as a stand alone application, you will still need to create one program.

Synergy Software offers data conversion services for a reasonable fee if you need to move data from another system. Please contact John Byer at 802-878-8514 Ext. 41 for more information.

➢ ***To start OmbudsManager licensed edition for the first time***

1 Click **Start** from the *Task Bar* in Windows®.

2 Select **Programs**, and then the folder called **OmbudsManager.**

3 Select the **OmbudsManager** icon.

4 The first time OmbudsManager is launched, you will be prompted to enter your *Program Information*. The *Program ID* is very important and cannot be changed after you've exited this screen. Please enter the unique identifier for your program as assigned by your state agency.

5 When prompted for a *Username* and Password, click OK to log in to the default GUEST account.

6 Click on the **Sytem Admin** bar in the *Navigation* pane.

7 Click on **Staff/Users** in the *Navigation* pane. Use the up and down arrows as necessary.

8 Click **New Item** on the toolbar.

-OR- Right click and select **New Item**.

9 Create a username that has supervisor (global access). Enter relevant information and click on **System Access**. Check the *Supervisor Access* box.

10 Exit and restart OmbudsManager.

11 Enter your new username. The password is USER. Click on the **Advanced>>** button. Enter a new password in *New Password*. Retype it in *Verify change*. Note your username and new password for future use. Click **OK**.

12 Click on the **Sytem Admin** bar in the *Navigation* pane.

13 Click on **Staff/Users** in the *Navigation* pane. Use the up and down arrows as necessary.

14 Highlight the *Guest* username.

15 Click **Edit Item** on the toolbar.

16 Uncheck the *Active* box to deactivate the *Guest* username.

17 Click **OK**.

18 Create more usernames as needed for your program.

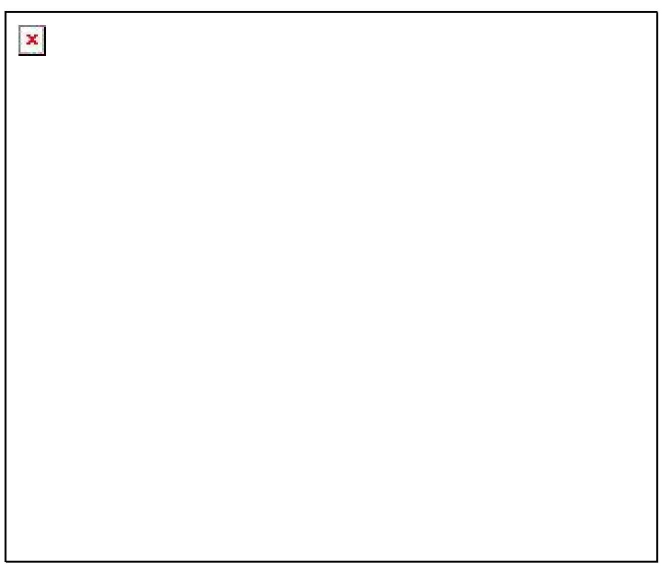
OmbudsManager Defaults

You can set two defaults in OmbudsManager: *Area Code* and the *Facility List Format*. The *Facility List Format* sets how facilities are displayed in pull downs as in the ***Complainant/Facility/Resident*** (on page 33) case screen. This allows you to type in the facilities pull down and have OmbudsManager search either on the *Facility Name* or on the *Facility ID.*

➢ *To set OmbudsManager defaults*

1 Select **Preferences** from the **System** menu.

2 Click in the *Area Code* field under *Defaults*. Enter or modify the default area code as needed.



3 Using the pull down, select a *Facility List Format* under the *List Formats* heading. You can choose to see *Facility ID - Facility Name* or *Facility Name - Facility ID*.

4 When finished, click **OK**.

SAMS 3.0 Database Location

OmbudsManager can ***import from SAMS 3.0 to create new resident records*** (see "Import a New Resident from SAMS 3.0" on page 87). You'll need to specify the location of the SAMS 3.0 database before running any imports.

➢ ***To set the location of the SAMS 3.0 database***

1 Select **Preferences** from the **System** menu.

2 Click in the *Database Location* field under *SAMS*.

3 Click on the **Browse (...)** button.

4 Navigate to the SAMS 3.0 folder.

5 Highlight the correct file.

6 Click **Open**.

7 Click **OK** in the *User Preferences* screen.

Database Administration

The OmbudsManager database requires little active management. You will need to ***backup your data*** (see "Simple Backup" on page 98) on a regular basis to ensure that hard drive and network failures do not mean you've lost critical data. ***Compacting the database*** (see "Compact Database" on page 99) will improve the response time of OmbudsManager when done on a regular basis.

Simple Backup

Regular backups of the OmbudsManager database are crucial to a swift recovery in the event of a major crash or other disaster. This section includes instructions for a *simple backup,* (see "Simple Backup" on page 98) but Synergy recommends that backups be done to removable media such as tape drives.

The file containing the OmbudsManager data (usually OmbudsManager.mdb) will need to be backup at the end of each workday. The typical rotation schedule for backup includes 6 media - one for each weekday and two for Fridays. The Friday media is taken off-site and the older backup is returned on Monday. Your backup needs may vary based on how often you use OmbudsManager and your security procedures. Please consult your network administrator if you need further recommendations on backup based on your individual needs and available equipment.

➢ ***To do a simple backup of OmbudsManager***

1. From the **Task Bar** in Windows, select **Programs** and then **Windows Explorer**.
2. Find the database file named in the ***OmbudsManager Login*** (see "Starting OmbudsManager" on page 7) screen. In a local install, the file is usually located in C:\Program Files\OmbudsManager.
3. Copy this file, usually called OmbudsManager.mdb to a different computer or hard drive.

Compact Database

When you delete any kind of file in OmbudsManager, the file is marked as deleted. Think of it as moving the file to the Recycle Bin. After a while the database contains many records marked as deleted. This slows the response time of the database.

Compacting the database physically removes all records that have been marked for deletion. Synergy recommends that a compact be run on a weekly or bi-weekly basis. Running *Compact* on a regular basis will help to minimize database response time and prevent data corruption. OmbudsManager will notify system users if a compact has not been performed within 30 days.

Access to *Compact Database* in OmbudsManager is only available to usernames with *Supervisor Access* or *Add/Remove Users* permission. All other users will need to be out of OmbudsManager to run a *Compact Database*.

➢ ***To compact the OmbudsManager database***

1 From the **System** menu, choose **Compact Database**.

2 Click **Yes** to run or **No** to cancel.

------------------------- OR -------------------------

➢ ***To run a compact outside of OmbudsManager***

1 From the **Start** menu, select **Program**, and then **OmbudsManager** folder.

-OR- In Windows XP, select **Start**, then **All Programs**, and then **OmbudsManager** folder.

2 Select **OmbudsManager Database Aid Utility**.

3 Use the **Browse(...)** button to find the correct database file.

4 Click **Go**.

Security

Security requirements vary from office to office and business to business. In some cases, you maybe content to give full access to all the people using OmbudsManager. In other cases, you may need to give different access levels to each individual. OmbudsManager has the flexibility to accommodate most security needs.

Assigning Username Permissions

OmbudsManager allows you to grant or deny users access to different areas of the program. In *Cases* and *Facilities*, you can choose the level of access for each area.

- *Can Access Cases* - allows a user to view and change case files. If a user does not have access to cases, OmbudsManager will prevent them from viewing the case list or entering the ***Cases*** (see "Entering Cases" on page 21) area. Useful for volunteers who should only access the ***Referrals*** (see "Creating Referrals" on page 51) area.
- *Create New Cases* - create new records in *Cases*, *Complainants*, and *Residents*. The username will also need *Access Cases* permission.
- *Can Delete Cases* - allows a user to delete records in *Cases*, *Complainants,* and *Residents*. The username will also need *Access Cases* permission.
- *Can Print* - print and export *Case* records and *Program Activities* including *Referrals*. If the username has *Run Reports* permission, they will still be able to print reports without *Can Print*.
- *Can Create Facilities* - create new facility records in the *Facilities* under *Tables* in the *Navigation* pane.
- *Can Modify Facilities* - open and change facility records in *Facilities.*
- *Can Delete Facilities* - allows a user to delete a facility.
- *Run Reports* - access to the *Reports* area. Depending on their other permissions, a user may not have access to certain restricted reports. See ***Securing Reports*** (on page 105) for more information.
- *Can Add/Remove Users* - allows the user access to *Staff/Users*. The user will not have full access to set permissions on usernames. Giving this permission also allows the user to ***compact the database*** (see "Compact Database" on page 99).
- *Supervisor Access* - universal access to OmbudsManager. Checking this box overrides the other settings.
- *Update Administrative Tables* - full access to the tables in System Admin except the *Staff/Users* area. The user can view the list of users but cannot create new, delete, or modify any user record.

Default Username Permissions

If do not assign permissions to a username, OmbudsManager will give them the following permissions:

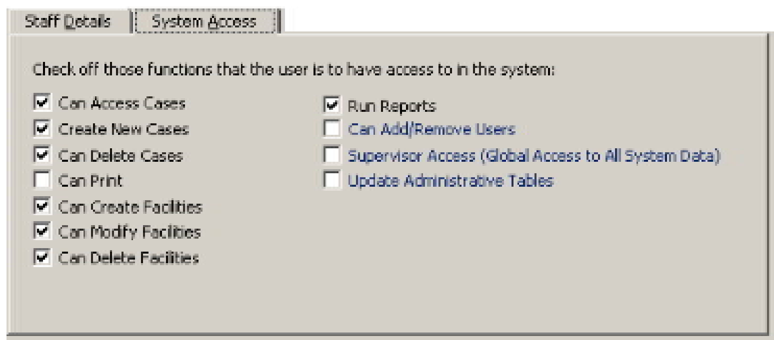
- Can Access Cases
- Create New Cases
- Can Print
- Run Reports

➢ *To assign or change permissions for an existing username*

1. Click on the **Sytem Admin** bar in the *Navigation* pane.
2. Click on **Staff/Users** in the *Navigation* pane. Use the up and down arrows as necessary.
3. Highlight the username you wish to change.
4. Click **Edit** on the toolbar.

-OR- Right click and select **Edit Item**.

5. Click on the **System Access** tab.



6. Check the boxes to set the level of permissions desired.
7. Click **OK**.

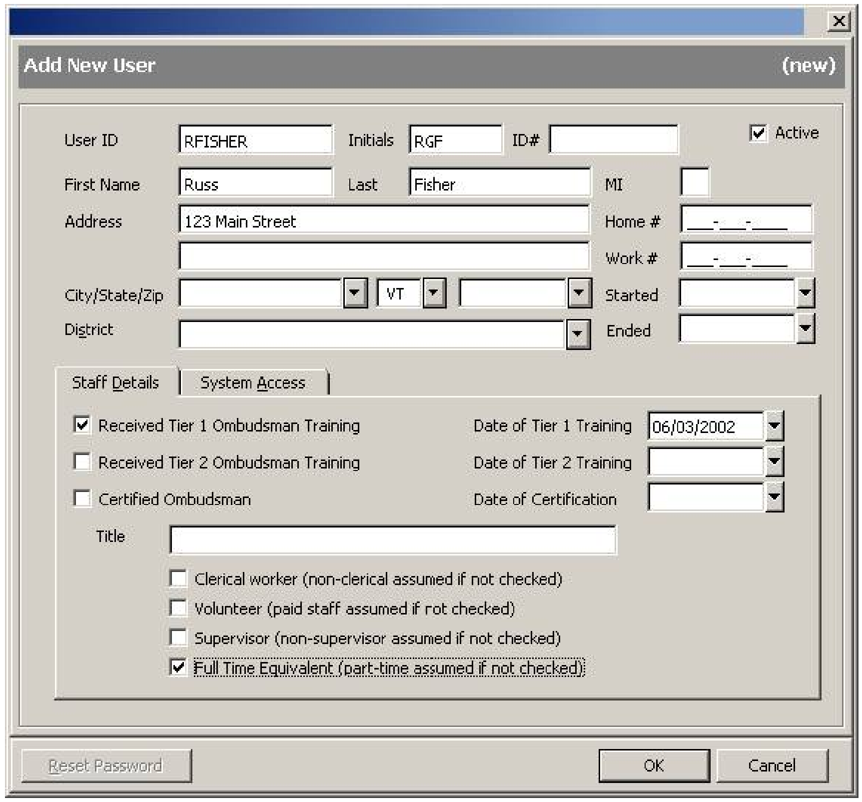
Adding New Usernames

When you create a new user, OmbudsManager automatically gives them the password USER. They can ***change this password*** (see "Changing Your Password" on page 8) as they log into OmbudsManager.

➢ *To create a new user*

1. Click on the **Sytem Admin** bar in the *Navigation* pane.
2. Click on **Staff/Users** in the *Navigation* pane. Use the up and down arrows as necessary.
3. Click **New Item** on the toolbar.

-OR- Right click and select **New Item**.



4 Enter in a unique *User ID*. The user will login with the *User ID*. As needed, enter in the user's address information, *Home* and *Work* phone numbers, *Started* and *Ended* dates, and select a *District*.

5 In the **Staff Details** section of the screen, enter in any necessary information about the user’s role in your program. If you check *Supervisor*, you can give the user ***access to restricted reports*** (see "Securing Reports" on page 105).

6 Click on the **System Access** tab.

7 Give the user permissions as outlined in ***Assigning Username Permissions*** (on page 100). If you do not assign permissions, OmbudsManager will give the username authority to access, create, and print cases and access to reports.

8 Click **OK** to save and close. The password for the new user is USER. Have the user login and ***change their password*** (see "Changing Your Password" on page 8) or do it for them.

Modifing a Username

In order to ensure accurate historical data, users who are involved in cases may not be deleted. Deactivating their user account will remove them from the selection lists when new cases are created.

➢ *To edit an existing username*

1 Click on the **Sytem Admin** bar in the *Navigation* pane.

2 Click on **Staff/Users** in the *Navigation* pane. Use the up and down arrows as necessary.

3 Highlight the username you wish to change.

4 Click **Edit** on the toolbar.

-OR- Right click and select **Edit Item**.

5 Modify the *First* and *Last* name, address and phone information, and *Started* and *Ended* dates as needed.

6 In *Staff Details*, check relevant boxes and enter dates of training as necessary.

7 Click **System Access**. Modify username permissions as needed. See ***Assigning Username Permissions*** (on page 100) as needed.

8 Click **OK**.

Resetting User Passwords

Use the following procedure if someone has forgotten their password. The program will reset the password to USER. You or the user can then ***change the password*** (see "Changing Your Password" on page 8) on the Log In screen.

➢ *To reset a user password*

1 Click on the **Sytem Admin** bar in the *Navigation* pane.

2 Click on **Staff/Users** in the *Navigation* pane. Use the up and down arrows as necessary.

3 Highlight the user record that needs a password reset.

4 Click **Edit** on the toolbar.

-OR- Right click and select **Edit Item**.

5 Click **Reset User Password** on the lower left edge the screen.

6 Click **OK** to save and close.

Deactivating/Activating Users

In order to ensure accurate historical data, users who are involved in cases may not be deleted. Deactivating their user account will remove them from the selection lists when new cases are created.

➢ *To deactivate (or activate) a username*

1. Click on the **Sytem Admin** bar in the *Navigation* pane.
2. Click on **Staff/Users** in the *Navigation* pane. Use the up and down arrows as necessary.
3. Highlight the username you wish to change.
4. Click **Edit** on the toolbar.

   -OR- Right click and select **Edit Item**.
5. Uncheck the **Active** box to deactivate the user.

   -OR- Check the **Active** box to activate the user.
6. Click **OK**.

Deleting Users

In order to ensure accurate historical data, users involved in cases may not be deleted. ***Deactivate the user*** (see "Deactivating/Activating Users" on page 104) instead to prevent users from assigning them to cases.

➢ *To delete a username*

1. Click on the **Sytem Admin** bar in the *Navigation* pane.
2. Click on **Staff/Users** in the *Navigation* pane. Use the up and down arrows as necessary.
3. Highlight the username you wish to delete.
4. On the toolbar, click **Delete**.

   -OR- Right click and select **Delete Item**.
5. At the prompt, click **Yes** to continue or **No** to cancel.

Securing Reports

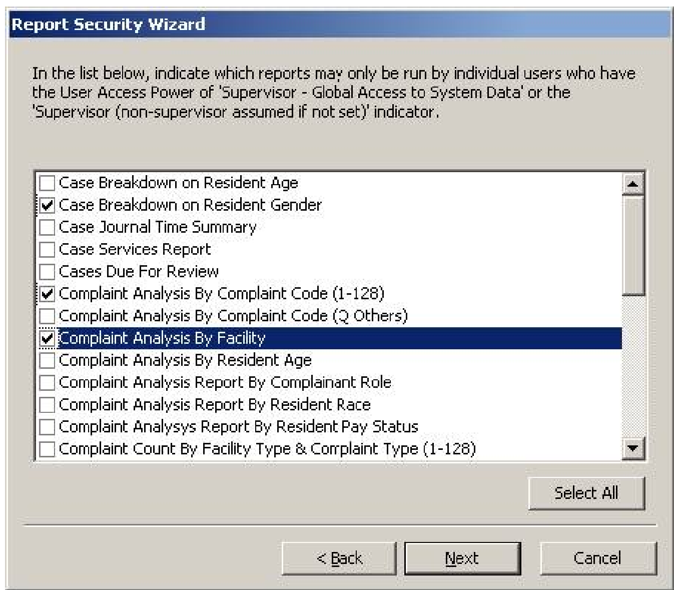
You can grant and deny access reports area for individual usernames. You may need, however, to allow limited users to run particularly sensitive reports while granting access to other individuals to run day to day reports.

Use the *Report Security Wizard* to restrict access to specific reports. In order for user to access restricted reports, they must either have *Supervisor Access* (global access) or *Supervisor* checked in *Staff Details*. Please see ***Assigning Username Permissions*** (on page 100) for more information about username permissions.

➢ ***To modify the access of specific reports to Supervisor usernames***

1 Select **Report Security Wizard** from the **System** menu.

2 Click **Next**.



3 Check the boxes to the left of the reports OmbudsManager should restrict to supervisor usernames. Click **Select All** to check all the reports. Uncheck boxes of reports that the program should allow non-supervisor usernames with *Run Report* authority to access.

4 Click **Next**.

5 Click **Finish** to continue with security changes.

Database Management

Most of the pull down menus in OmbudsManager are customizable. *Database Management* outlines how to create, edit, and remove options for the pull downs.

Programs

Programs allow several offices to share one OmbudsManager database. When you installed OmbudsManager you created one program. All case files, facilities, and staff members are associated with a *Program*.

Adding a New Program

When you create a new program, a new *Guest* username is created for that program. Exit OmbudsManager, restart OmbudsManager, and log into the new program using the pull down on the *Log In* screen. Enter new ***Staff*** (see "Adding New Usernames" on page 101) as needed for the program.

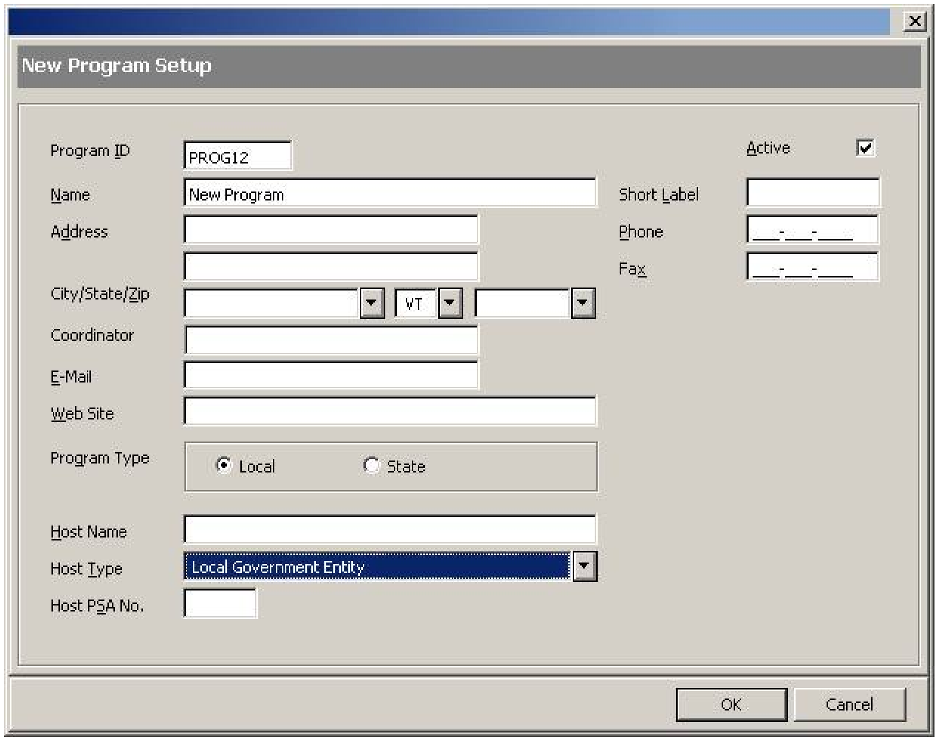
➢ ***To add a new program***

1 Click on the **Sytem Admin** bar in the *Navigation* pane.

2 Click on **Programs** in the *Navigation* pane. Use the up and down arrows as necessary.

3 Click **New Item** on the toolbar.

-OR- Right click and select **New Item**.



4 Enter a unique *Program ID* based on your state Ombudsman office conventions and a *Name*. Type in the *Address*, *Short Label*, *Phone* and *Fax* numbers as known. The *Program ID* cannot be changed after saving the record. Please contact your program manager if you do not know what to enter for the *Program ID*.

5 Type in other information as relevant or known. Select a *Host Type* and enter a *Host Name* and *Host PSA No.*

6 When finished, click **OK**.

Modify a Program

➢ ***To edit a program's information***

1 Click on the **Sytem Admin** bar in the *Navigation* pane.

2 Click on **Programs** in the *Navigation* pane. Use the up and down arrows as necessary.

3 Highlight the record you want to change.

4 Click **Edit** on the toolbar.

-OR- Right click and select **Edit Item**.

5 Modify program information as needed. To deactivate a program, uncheck the box next to *Active*. You cannot change the *Program ID*.

6 When finished, click **OK**.

Remove a Program

Deleting programs from OmbudsManager is not recommended as it deletes all data relevant to that program including *Cases, Facilities* and *Residents*. Deactivate a program instead of deleting by ***removing the check from the Active box*** (see "Modify a Program" on page 107) in the program record.

➤ ***To remove a program from the OmbudsManager database***

1 Click on the **Sytem Admin** bar in the *Navigation* pane.

2 Click on **Programs** in the *Navigation* pane. Use the up and down arrows as necessary.

3 Highlight the record you wish to remove.

4 On the toolbar, click **Delete**.

-OR- Right click and select **Delete Item**.

5 At the prompt, click **Yes** to continue or **No** to cancel.

States

OmbudsManager uses *State* pull downs for address information. If you also need to create many towns and zip codes for a new states, ***import the data from the locations database*** (see "Importing Additional Towns, Counties, and ZIP Codes" on page 140) instead of entering it manually. OmbudsManager will automatically create the state record as well.

Create a New State

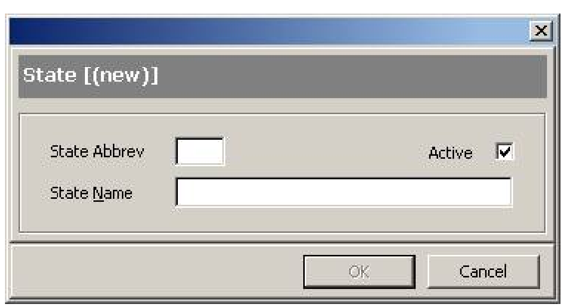
➤ ***To create a new state***

1 Click on the **Sytem Admin** bar in the *Navigation* pane.

2 Click on **States** in the *Navigation* pane. Use the up and down arrows as necessary.

3 Click **New Item** on the toolbar.

-OR- Right click and select **New Item**.



4 Enter a *State Abbrev(iation)* and *State Name*.

5 Click **OK**.

Modify a State Record

➢ ***To edit a state record***

1 Click on the **Sytem Admin** bar in the *Navigation* pane.

2 Click on **States** in the *Navigation* pane. Use the up and down arrows as necessary.

3 Highlight the record you want to change.

4 Click **Edit** on the toolbar.

-OR- Right click and select **Edit Item**.

5 Change the *Active* status using the check box. Modify the *State Name* as necessary. You cannot change the state abbreviation.

6 When finished, click **OK**.

Remove a State Record

➢ ***To delete a state record***

1 Click on the **Sytem Admin** bar in the *Navigation* pane.

2 Click on **States** in the *Navigation* pane. Use the up and down arrows as necessary.

3 Highlight the record you wish to remove.

4 On the toolbar, click **Delete**.

-OR- Right click and select **Delete Item**.

5 At the prompt, click **Yes** to continue or **No** to cancel.

Counties

OmbudsManager associates all counties with a state. You can ***import county, town and ZIP Code*** (see "Importing Additional Towns, Counties, and ZIP Codes" on page 140) data from the locations database, if needed, instead of creating counties manually. OmbudsManager can store the county of each ***Facility*** (see "Facilities" on page 71).

Add a New County

➢ ***To create a new county record***

1 Click on the **Sytem Admin** bar in the *Navigation* pane.

2 Click on **Counties** in the *Navigation* pane. Use the up and down arrows as necessary.

3 Click **New Item** on the toolbar.

-OR- Right click and select **New Item**.

4 Select a *State* and enter a *County Name*.

5 Click **OK**.

Change a County Record

➢ *To modify an existing county*

1 Click on the **Sytem Admin** bar in the *Navigation* pane.

2 Click on **Counties** in the *Navigation* pane. Use the up and down arrows as necessary.

3 Highlight the record you want to change.

4 Click **Edit** on the toolbar.

-OR- Right click and select **Edit Item**.

5 Modify the *County Name* or change the *Active* status using the check box. You cannot change the *State* associated with a *County*.

6 When finished, click **OK**.

Delete a County

➢ *To remove a county record*

1 Click on the **Sytem Admin** bar in the *Navigation* pane.

2 Click on **Counties** in the *Navigation* pane. Use the up and down arrows as necessary.

3 Highlight the record you wish to remove.

4 On the toolbar, click **Delete**.

-OR- Right click and select **Delete Item**.

5 At the prompt, click **Yes** to continue or **No** to cancel.

Districts

You can associate ***facilities*** (see "Facility Information" on page 74), ***activity records*** (see "Program Activities" on page 57) and ***usernames*** (see "Adding New Usernames" on page 101) to a specific district.

Create a New District

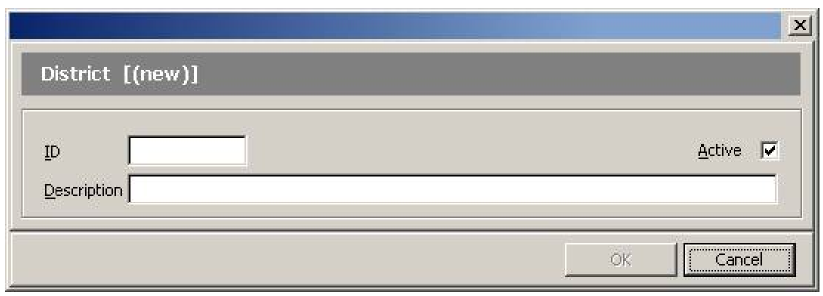
➢ ***To add a new district to OmbudsManager***

1 Click on the **Sytem Admin** bar in the *Navigation* pane.

2 Click on **Districts** in the *Navigation* pane. Use the up and down arrows as necessary.

3 Click **New Item** on the toolbar.

-OR- Right click and select **New Item**.



4 Enter a district *ID* and *Description*.

5 Click **OK**.

Edit a District

➢ ***To change the Description or Active status of a district***

1 Click on the **Sytem Admin** bar in the *Navigation* pane.

2 Click on **Districts** in the *Navigation* pane. Use the up and down arrows as necessary.

3 Highlight the record you want to change.

4 Click **Edit** on the toolbar.

-OR- Right click and select **Edit Item**.

5 Modify the *Description* and the *Active* status as need.

6 Click **OK**.

Delete a District

➢ ***To remove a district***

1 Click on the **Sytem Admin** bar in the *Navigation* pane.

2 Click on **Districts** in the *Navigation* pane. Use the up and down arrows as necessary.

3 Highlight the record you wish to remove.

4 On the toolbar, click **Delete**.

-OR- Right click and select **Delete Item**.

5 At the prompt, click **Yes** to continue or **No** to cancel.

Towns

Towns connect *Counties* and *ZIP Codes* together. *Address* fields throughout OmbudsManager use the *Town*, *County*, and *ZIP Code* relationship to make data entry easier. Simply select the *Town* or *ZIP Code* and the program fills in all the rest of the relevant information.

If you need to add many towns to the database, ***import from the locations*** (see "Importing Additional Towns, Counties, and ZIP Codes" on page 140) database instead of doing manual entry.

Add a New Town

➢ ***To create a new town***

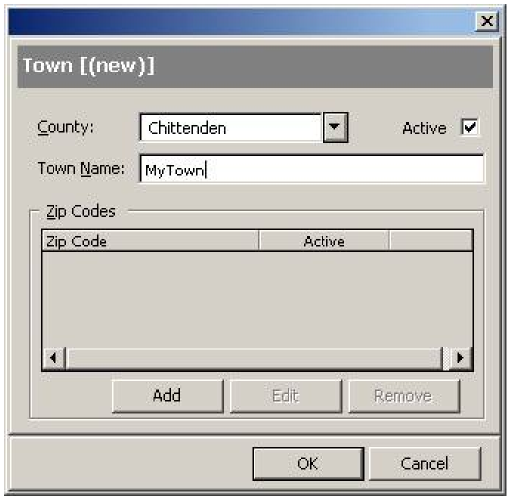
1 Click on the **Sytem Admin** bar in the *Navigation* pane.

2 Click on **Towns** in the *Navigation* pane. Use the up and down arrows as necessary.

3 Click **New Item** on the toolbar.

-OR- Right click and select **New Item**.

4 Select a *County* and enter a *Town Name*.



5 Click **Add** to associate a *ZIP Code* to the town.

6 Enter a *ZIP Code* (5 or 9 digit) and click **OK**.

7 Repeat steps five and six until you've added all appropriate ZIP Codes.

8 Click **OK**.

Edit a Town

➢ ***To modify a town***

1 Click on the **Sytem Admin** bar in the *Navigation* pane.

2 Click on **Towns** in the *Navigation* pane. Use the up and down arrows as necessary.

3 Highlight the record you want to change.

4 Click **Edit** on the toolbar.

-OR- Right click and select **Edit Item**.

5 Modify the *Town Name*, if necessary.

6 Click **Add** to associate a new ZIP Code to the town, if needed. Enter the *ZIP Code* and click **OK**.

7 To change an existing *ZIP Code*, highlight the code. Click **Edit**. Change the *Active* status by using the check box or modify the *ZIP Code*.

8 To delete a *ZIP Code* associated with the town, highlight the appropriate ZIP Code. Click **Remove**. At the prompt, click **Yes** to continue or **No** to cancel.

9 Repeat steps six through eight until you've made all necessary modifications.

10 Click **OK**.

Remove a Town

➢ ***To remove a town from OmbudsManager***

1 Click on the **Sytem Admin** bar in the *Navigation* pane.

2 Click on **Towns** in the *Navigation* pane. Use the up and down arrows as necessary.

3 Highlight the record you wish to remove.

4 On the toolbar, click **Delete**.

-OR- Right click and select **Delete Item**.

5 At the prompt, click **Yes** to continue or **No** to cancel.

Disposition Types

A *Disposition Type* explains the final outcome of each complaint associated with a case. You'll find the *Disposition* pull down in case ***Complaints*** *(on page 29)*.

Create a New Disposition Type

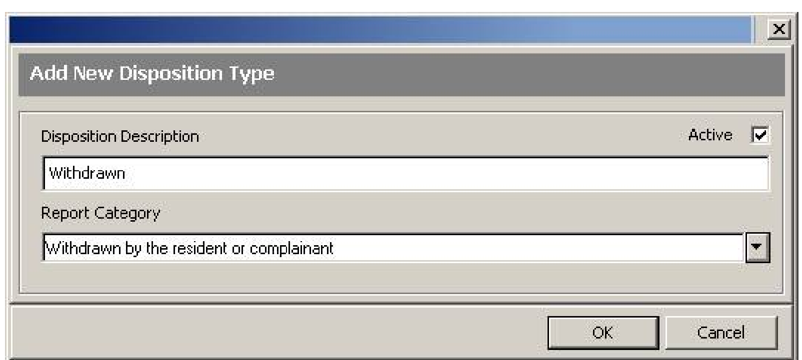
➢ ***To add a new disposition to OmbudsManager***

1 Click on the **Sytem Admin** bar in the *Navigation* pane.

2 Click on **Disposition Types** in the *Navigation* pane. Use the up and down arrows as necessary.

3 Click **New Item** on the toolbar.

-OR- Right click and select **New Item**.



4 Enter a *Disposition Description* and select a *Report Category*. The report category for use with NORS reporter.

5 Click **OK**.

Modify a Disposition Type

➢ ***To change an existing disposition***

1 Click on the **Sytem Admin** bar in the *Navigation* pane.

2 Click on **Disposition Types** in the *Navigation* pane. Use the up and down arrows as necessary.

3 Highlight the record you want to change.

4 Click **Edit** on the toolbar.

-OR- Right click and select **Edit Item**.

5 Modify the *Disposition Description* as needed. Change the *Active* status using the check box.

6 Click **OK**.

Delete a Diposition

➢ ***To remove a disposition from OmbudsManager***

1 Click on the **Sytem Admin** bar in the *Navigation* pane.

2 Click on **Disposition Types** in the *Navigation* pane. Use the up and down arrows as necessary.

3 Highlight the record you wish to remove.

4 On the toolbar, click **Delete**.

-OR- Right click and select **Delete Item**.

5 At the prompt, click **Yes** to continue or **No** to cancel.

Facility Types

Facility Types classify facilities for reports and in NORS Reporter. Any changes to this area will change the *Type* pull down found in ***Facility Information*** (on page 74) of a facility record.

Creating a Facility Type

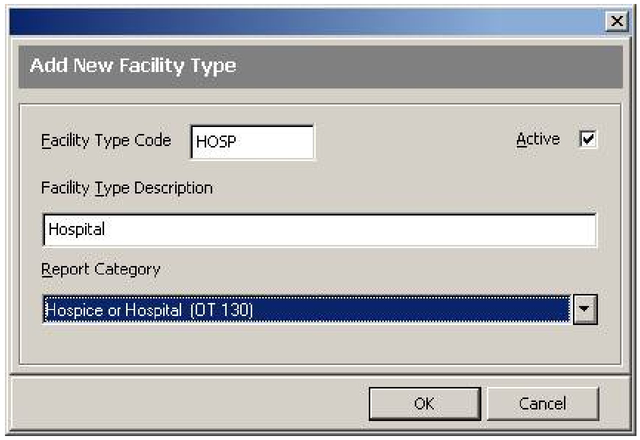
➢ ***To add a facility type to the database***

1 Click on the **Sytem Admin** bar in the *Navigation* pane.

2 Click on **Facility Types** in the *Navigation* pane. Use the up and down arrows as necessary.

3 Click **New Item** on the toolbar.

-OR- Right click and select **New Item**.



4 Enter a *Facility Type Code*. The code is a short name for the facility type. Enter a *Facility Type Description* and select a *Report Category* for NORS Reporter.

5 Click **OK**.

Edit a Facility Type

➢ *To change a facility type*

1 Click on the **Sytem Admin** bar in the *Navigation* pane.

2 Click on **Facility Types** in the *Navigation* pane. Use the up and down arrows as necessary.

3 Highlight the record you want to change.

4 Click **Edit** on the toolbar.

-OR- Right click and select **Edit Item**.

5 Modify the *Facility Type Description* as needed. Use the check box to change the *Active* status. Select a new *Report Category* as needed.

6 Click **OK**.

Remove a Facility Type

➢ *To delete a facility type*

1 Click on the **Sytem Admin** bar in the *Navigation* pane.

2 Click on **Facility Types** in the *Navigation* pane. Use the up and down arrows as necessary.

3 Highlight the record you wish to remove.

4 On the toolbar, click **Delete**.

-OR- Right click and select **Delete Item**.

5 At the prompt, click **Yes** to continue or **No** to cancel.

Activity Types

Activity Types classify *Program Activities* in OmbudsManager. A ***Referral*** *(see "*Creating Referrals*" on page 51)* is an activity with a type of *Information and consultation. Program Activities* record and manage staff work on cases. You can find the *Type* pull down at the top of the screen when you create a new *Referral* or ***Program Activity*** (see "Program Activities" on page 57).

Add a New Activity Type

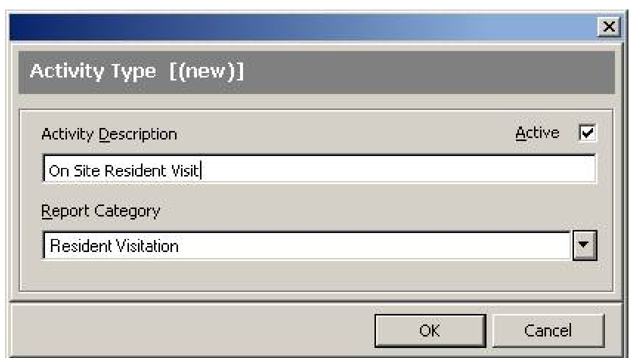
➢ ***To create a new activity type***

1 Click on the **Sytem Admin** bar in the *Navigation* pane.

2 Click on **Activities** in the *Navigation* pane. Use the up and down arrows as necessary.

3 Click **New Item** on the toolbar.

-OR- Right click and select **New Item**.



4 Type an *Activity Description* and select a NORS *Report Category*.

5 Click **OK**.

Modify an Activity Type

➢ ***To edit an existing activity***

1 Click on the **Sytem Admin** bar in the *Navigation* pane.

2 Click on **Activities** in the *Navigation* pane. Use the up and down arrows as necessary.

3 Highlight the record you want to change.

4 Click **Edit** on the toolbar.

-OR- Right click and select **Edit Item**.

5 Modify the *Active* status by using the check box. Change the *Activity Description* and/or *Report Category* as needed.

6 Click **OK**.

Delete an Activity Type

➢ ***To remove an activity type***

1 Click on the **Sytem Admin** bar in the *Navigation* pane.

2 Click on **Activities** in the *Navigation* pane. Use the up and down arrows as necessary.

3 Highlight the record you wish to remove.

4 On the toolbar, click **Delete**.

-OR- Right click and select **Delete Item**.

5 At the prompt, click **Yes** to continue or **No** to cancel.

Consultation Topics

OmbudsManager stores *Consultation Topics* with ***Program Activities*** (see "Program Activities and *Referrals (see "*Creating Referrals*" on page 51)*. *Consultation Topics* categorize the information relayed during a program activity.

Add a New Topic

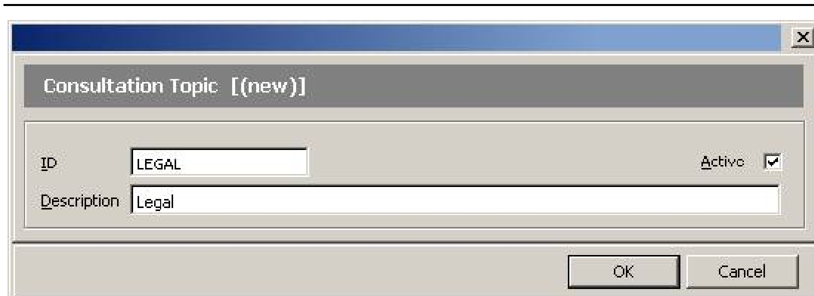
➢ ***To add a new consultation topic***

1 Click on the **Sytem Admin** bar in the *Navigation* pane.

2 Click on **Consultation Topics** in the *Navigation* pane. Use the up and down arrows as necessary.

3 Click **New Item** on the toolbar.

-OR- Right click and select **New Item**.



4 Enter a unique *ID* and a *Description*.

5 Click **OK**.

Modifying a Topic

➢ ***To edit a consultation topic***

1 Click on the **Sytem Admin** bar in the *Navigation* pane.

2 Click on **Consultation Topics** in the *Navigation* pane. Use the up and down arrows as necessary.

3 Highlight the record you want to change.

4 Click **Edit** on the toolbar.

-OR- Right click and select **Edit Item**.

5 Use the check box to change *Active* status or modify the *Description*.

6 When finished, click **OK**.

Delete a Topic

➢ ***To remove a consultation topic***

1 Click on the **Sytem Admin** bar in the *Navigation* pane.

2 Click on **Consultation Topics** in the *Navigation* pane. Use the up and down arrows as necessary.

3 Highlight the record you wish to remove.

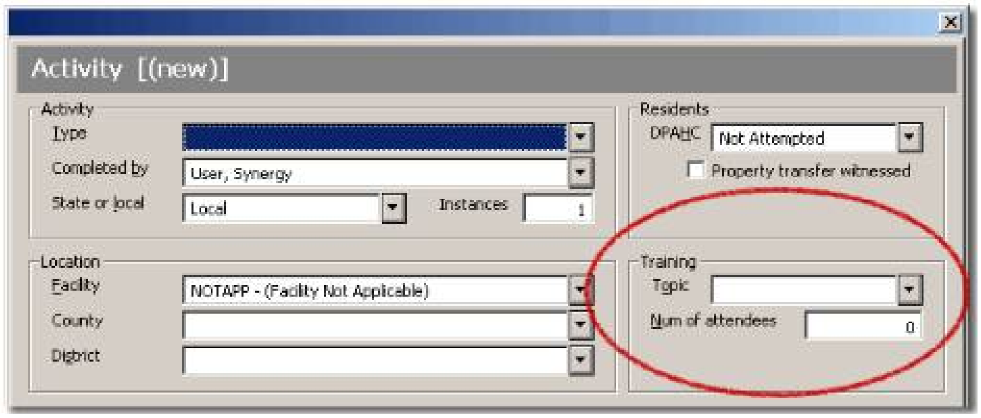
4 On the toolbar, click **Delete**.

-OR- Right click and select **Delete Item**.

5 At the prompt, click **Yes** to continue or **No** to cancel.

Training Topics

Training Topics are the pull down found in the upper right corner of the *Program Activities* screen.

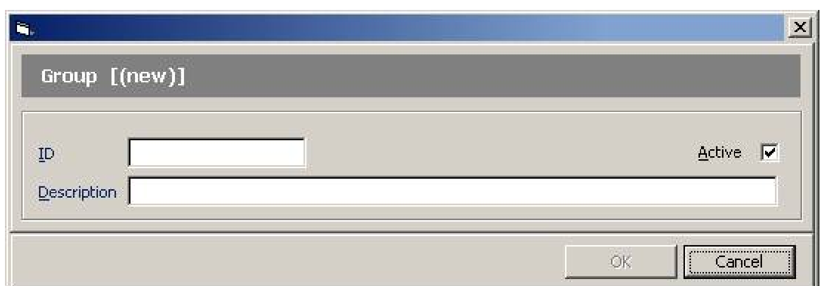


Create a New Training Topic

➢ *To add a new training topic*

1. Click on the **Sytem Admin** bar in the *Navigation* pane.
2. Click on **Training Topics** in the *Navigation* pane. Use the up and down arrows as necessary.
3. Click **New Item** on the toolbar.

-OR- Right click and select **New Item**.



4. Enter a training topic *ID* and *Description*.
5. Click **OK**.

Modify a Training Topic

➢ *To change a training topic*

1. Click on the **Sytem Admin** bar in the *Navigation* pane.

2 Click on **Training Topics** in the *Navigation* pane. Use the up and down arrows as necessary.

3 Highlight the record you want to change.

4 Click **Edit** on the toolbar.

-OR- Right click and select **Edit Item**.

5 Use the check box to change *Active* status or modify the *Description*.

6 When finished, click **OK**.

Remove a Training Topic

➢ ***To delete a training topic***

1 Click on the **Sytem Admin** bar in the *Navigation* pane.

2 Click on **Training Topics** in the *Navigation* pane. Use the up and down arrows as necessary.

3 Highlight the record you wish to remove.

4 On the toolbar, click **Delete**.

-OR- Right click and select **Delete Item**.

5 At the prompt, click **Yes** to continue or **No** to cancel.

Complaint Against

Complaint Against is part of a *Complaint record* (see "Complaints" on page 29). Complaint records are section of a ***Case*** (see "Entering Cases" on page 21). You'll find the *Complaint Against* option under *Additional Information* in the complaint record.

Create a Complaint Against Option

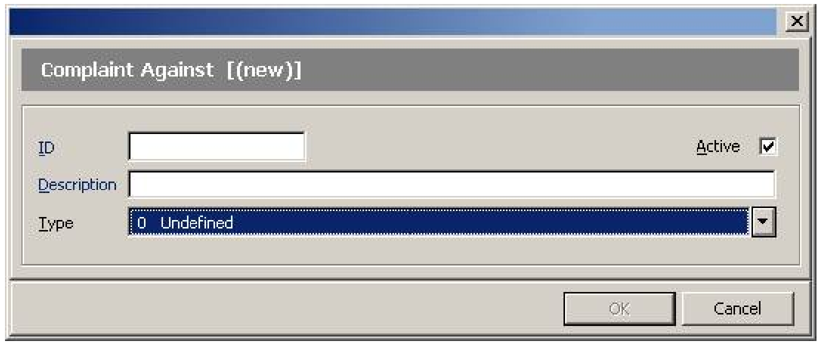
➢ ***To add a complaint against option***

1 Click on the **Sytem Admin** bar in the *Navigation* pane.

2 Click on **Complaint Against** in the *Navigation* pane. Use the up and down arrows as necessary.

3 Click **New Item** on the toolbar.

-OR- Right click and select **New Item**.



4 Enter a complaint against *ID* and *Description*. Select a *Type*. OmbudsManager includes 12 different types to allow you to create more than one custom description for each Type.

5 Click **OK**.

Modify a Complaint Against Option

➢ *To edit a complaint against option*

1 Click on the **Sytem Admin** bar in the *Navigation* pane.

2 Click on **Training Topics** in the *Navigation* pane. Use the up and down arrows as necessary.

3 Highlight the record you want to change.

4 Click **Edit** on the toolbar.

-OR- Right click and select **Edit Item**.

5 Use the check box to change *Active* status. Modify the *Description* and/or *Type* as needed.

6 When finished, click **OK**.

Delete a Complaint Against Option

➢ *To delete a training topic*

1 Click on the **Sytem Admin** bar in the *Navigation* pane.

2 Click on **Complaint Against** in the *Navigation* pane. Use the up and down arrows as necessary.

3 Highlight the record you wish to remove.

4 On the toolbar, click **Delete**.

-OR- Right click and select **Delete Item**.

5 At the prompt, click **Yes** to continue or **No** to cancel.

Investigated by

Investigated by is a field stored with *complaint* (see "Complaints" on page 29) in a *case* (see "Entering Cases" on page 21). You'll find the pull down under the **Additional Information** tab of a complaint.

Add an Investigated By Option

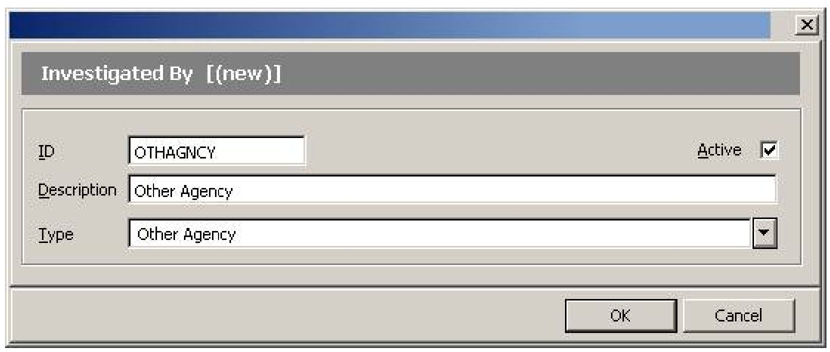
➢ ***To create an investigated by option***

1 Click on the **Sytem Admin** bar in the *Navigation* pane.

2 Click on **Investigated By** in the *Navigation* pane. Use the up and down arrows as necessary.

3 Click **New Item** on the toolbar.

-OR- Right click and select **New Item**.



4 Enter an *ID* and *Description*. Select a *Type*. OmbudsManager includes 7 different types to allow you to create more than one custom description for each type.

5 Click **OK**.

Edit an Investigated By Option

➢ ***To change an investigated by option***

1 Click on the **Sytem Admin** bar in the *Navigation* pane.

2 Click on **Investigated By** in the *Navigation* pane. Use the up and down arrows as necessary.

3 Highlight the record you want to change.

4 Click **Edit** on the toolbar.

-OR- Right click and select **Edit Item**.

5 Use the check box to change *Active* status. Modify the *Description* and/or *Type* as needed.

6 When finished, click **OK**.

Delete an Investigated By Option

➢ ***To delete an investigated by option***

1. Click on the **Sytem Admin** bar in the *Navigation* pane.
2. Click on **Investigated By** in the *Navigation* pane. Use the up and down arrows as necessary.
3. Highlight the record you wish to remove.
4. On the toolbar, click **Delete**.

-OR- Right click and select **Delete Item**.

5. At the prompt, click **Yes** to continue or **No** to cancel.

Referral Agencies

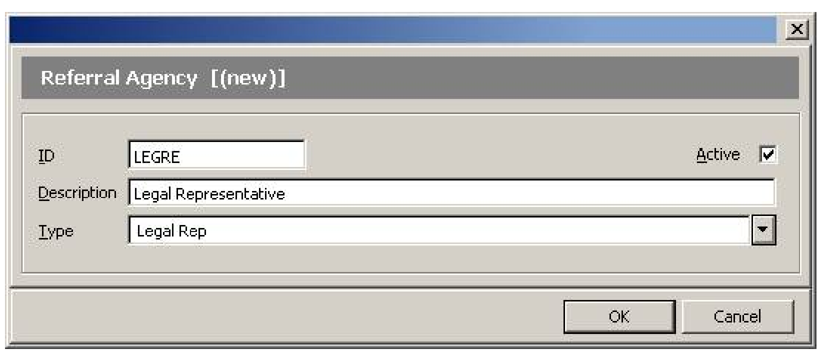
Referral Agencies are stored with ***complaint*** (see "Complaints" on page 29) records in ***cases*** (see "Entering Cases" on page 21). Any changes to *Referral Agencies* change the *Primary referral* pull down in *Additional Information* in a complaint record.

Create a New Referral Agency

➢ ***To create a new referral agency***

1. Click on the **Sytem Admin** bar in the *Navigation* pane.
2. Click on **Referral Agencies** in the *Navigation* pane. Use the up and down arrows as necessary.
3. Click **New Item** on the toolbar.

-OR- Right click and select **New Item**.



4. Enter an *ID* and *Description*. Select a *Type*. OmbudsManager includes 6 different types to allow you to create more than one custom description for each type.

5 Click **OK**.

Modify a Referral Agency

➢ ***To change a referral agency***

1 Click on the **Sytem Admin** bar in the *Navigation* pane.

2 Click on **Referral Agencies** in the *Navigation* pane. Use the up and down arrows as necessary.

3 Highlight the record you want to change.

4 Click **Edit** on the toolbar.

-OR- Right click and select **Edit Item**.

5 Use the check box to change *Active* status. Modify the *Description* and/or *Type* as needed.

6 When finished, click **OK**.

Remove a Referral Agency

➢ ***To delete a referral agency***

1 Click on the **Sytem Admin** bar in the *Navigation* pane.

2 Click on **Referral Agencies** in the *Navigation* pane. Use the up and down arrows as necessary.

3 Highlight the record you wish to remove.

4 On the toolbar, click **Delete**.

-OR- Right click and select **Delete Item**.

5 At the prompt, click **Yes** to continue or **No** to cancel.

Complainant Roles

Complainant Roles describe the relationship of the complainant to the resident. You can select a complainant role in the ***Complainant/Facility/Resident*** (on page 33) section of a case.

Add a Complainant Role

➢ ***To create a complainant role***

1 Click on the **Sytem Admin** bar in the *Navigation* pane.

2 Click on **Complainant Roles** in the *Navigation* pane. Use the up and down arrows as necessary.

3 Click **New Item** on the toolbar.

-OR- Right click and select **New Item**.

4 Enter a *Role Description* and select a NORS *Report Category*.

5 Click **OK**.

Edit a Complainant Role

➢ *To modify a complainant role*

1 Click on the **Sytem Admin** bar in the *Navigation* pane.

2 Click on **Complainant Roles** in the *Navigation* pane. Use the up and down arrows as necessary.

3 Highlight the record you want to change.

4 Click **Edit** on the toolbar.

-OR- Right click and select **Edit Item**.

5 Use the check box to change *Active* status as needed. Modify the *Role Description*, if necessary. You cannot change the NORS *Report Category*.

6 When finished, click **OK**.

Delete a Complainant Role

➢ *To remove a complainant role*

1 Click on the **Sytem Admin** bar in the *Navigation* pane.

2 Click on **Complainant Roles** in the *Navigation* pane. Use the up and down arrows as necessary.

3 Highlight the record you wish to remove.

4 On the toolbar, click **Delete**.

-OR- Right click and select **Delete Item**.

5 At the prompt, click **Yes** to continue or **No** to cancel.

Complaint Codes

Complaint Codes categorize each ***complaint of a case*** (see "Complaints" on page 29). A complaint has a major and minor category. The major category is a broad area of complaint. The minor code describes the actual complaint.

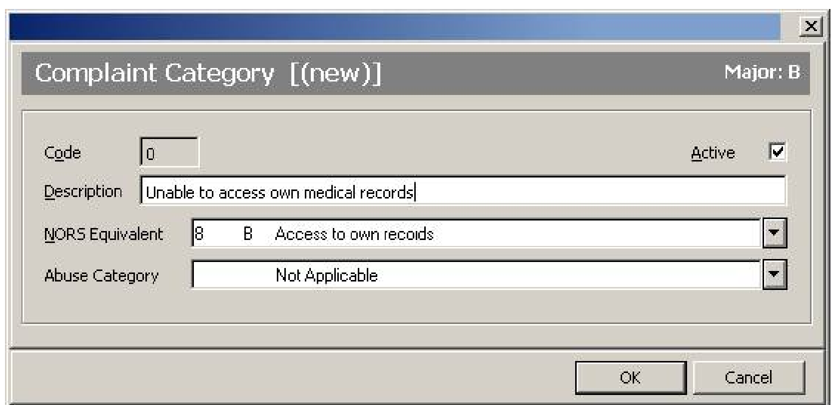
When you create custom complainant codes, you'll select from a list of 133 *NORS Equivalent* report categories. Each category has a number and a letter. Each letter A-Q corresponds to a major complaint category. The numbers correspond to the minor category.

Create a New Complaint Code

➢ ***To add a new complaint code***

1. Click on the **Sytem Admin** bar in the *Navigation* pane.
2. Click on **Complaint Codes** in the *Navigation* pane. Use the up and down arrows as necessary.
3. Click **New Item** on the toolbar.

-OR- Right click and select **New Item**.



4. Enter a *Description* and select a *NORS Equivalent*. Select an Abuse Category, if appropriate.
5. Click **OK**.

Edit a Complaint Code

➢ ***To modify a complainant role***

1. Click on the **Sytem Admin** bar in the *Navigation* pane.
2. Click on **Complaint Codes** in the *Navigation* pane. Use the up and down arrows as necessary.
3. Highlight the record you want to change.

4 Click **Edit** on the toolbar.

-OR- Right click and select **Edit Item**.

5 Use the check box to change *Active* status as needed. Modify the *Description* or *Abuse Category*, if necessary. You cannot change the NORS *Equivalent*.

6 When finished, click **OK**.

Remove a Complaint Code

➢ ***To delete a complaint code***

1 Click on the **Sytem Admin** bar in the *Navigation* pane.

2 Click on **Complaint Codes** in the *Navigation* pane. Use the up and down arrows as necessary.

3 Highlight the record you wish to remove.

4 On the toolbar, click **Delete**.

-OR- Right click and select **Delete Item**.

5 At the prompt, click **Yes** to continue or **No** to cancel.

User Fields

User Fields store data with no other place in OmbudsManager. Both *Case* and *Facility* records can have custom data fields.

Types of User Fields

When you create a user field, you must select a *Data Type*. The type defines what kind of data the program will store and helps prevent users from entering incorrect data.

- Text - stores alpha-numeric characters (numbers and letters). You define the number of characters (length of the string) to store. Text holds almost any kind of data, but it's much harder to report on it. If possible, use one of the other data types to make reporting easier.
- Date - holds a date in MM/DD/YYYY format.
- Boolean - a field that holds a true or false value. This type of field is best suited for Yes/No or True/False information.
- Number - holds a numerical value. You define the number of decimal places to be stored. Use zero for integers.
- Currency - a number field with two decimal places to hold monetary values.

Create a New User Field

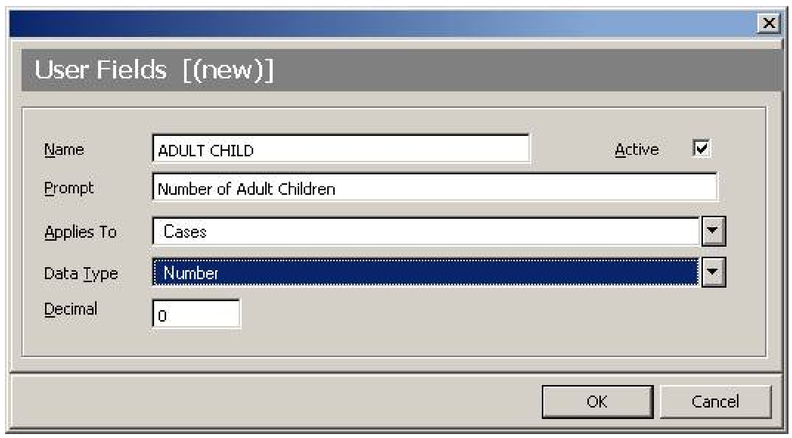
➢ *To create new user field*

1 Click on the **Sytem Admin** bar in the *Navigation* pane.

2 Click on **User Fields** in the *Navigation* pane. Use the up and down arrows as necessary.

3 Click **New Item** on the toolbar.

-OR- Right click and select **New Item**.



4 Enter the *Name* of the user field. Users will pick from a list of names when entering data into the field. The program displays the *Prompt* in the title of the data entry screen.

In *Applies To*, select either *Cases* or *Facilities*. Select a *Data Type* and enter an appropriate information based on the data type chosen. See ***Types of User Fields*** (on page 128) for more information about selecting a *Data Type*.

5 Review your new user field. After you save the user field, you will not be able to change *Applies To* or *Data Type*.

6 When finished, click **OK**.

Modify a User Field

➢ *To modify a user field*

1 Click on the **Sytem Admin** bar in the *Navigation* pane.

2 Click on **User Fields** in the *Navigation* pane. Use the up and down arrows as necessary.

3 Highlight the record you want to change.

4 Click **Edit** on the toolbar.

-OR- Right click and select **Edit Item**.

5 Use the check box to change *Active* status as needed. Modify the *Name* and *Prompt*, if necessary. You cannot change the *Data Type* or *Applies To* fields.

6 When finished, click **OK**.

Delete a User Field

Use the procedure below to remove user field with no data tied to it.

➢ ***To remove a user field***

1 Click on the **Sytem Admin** bar in the *Navigation* pane.

2 Click on **User Fields** in the *Navigation* pane. Use the up and down arrows as necessary.

3 Highlight the record you wish to remove.

4 On the toolbar, click **Delete**.

-OR- Right click and select **Delete Item**.

5 At the prompt, click **Yes** to continue or **No** to cancel.

Providers

You select a *Provider* when recording a case ***Service*** (on page 40).

Add a Provider

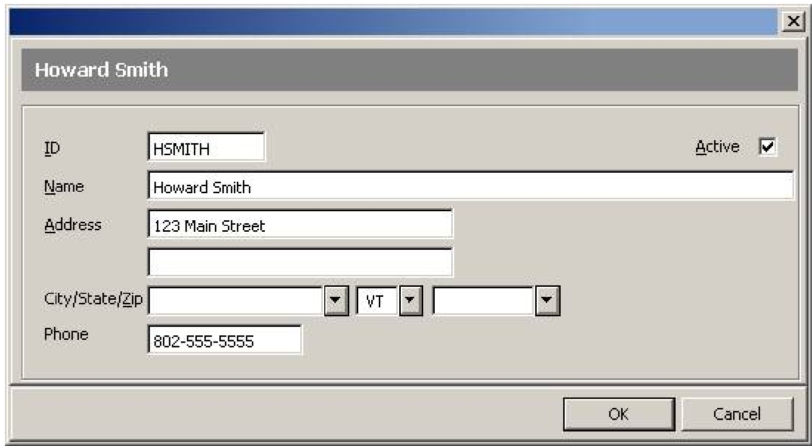
➢ ***To create a new provider***

1 Click on the **Sytem Admin** bar in the *Navigation* pane.

2 Click on **Providers** in the *Navigation* pane. Use the up and down arrows as necessary.

3 Click **New Item** on the toolbar.

-OR- Right click and select **New Item**.



4 Type in an *ID* and a *Name*. Enter *Address* and *Phone* information as known.

5 When finished, click **OK**.

Modify a Provider

➢ ***To change a provider record***

1 Click on the **Sytem Admin** bar in the *Navigation* pane.

2 Click on **Providers** in the *Navigation* pane. Use the up and down arrows as necessary.

3 Highlight the record you want to change.

4 Click **Edit** on the toolbar.

-OR- Right click and select **Edit Item**.

5 Use the check box to change *Active* status as needed. Modify the *Name*, *Address* information and/or *Phone*, if necessary. You cannot change the *ID*.

6 When finished, click **OK**.

Remove a Provider

➢ ***To delete a provider***

1 Click on the **Sytem Admin** bar in the *Navigation* pane.

2 Click on **Providers** in the *Navigation* pane. Use the up and down arrows as necessary.

3 Highlight the record you wish to remove.

4 On the toolbar, click **Delete**.

-OR- Right click and select **Delete Item**.

5 At the prompt, click **Yes** to continue or **No** to cancel.

Services

Cases can store records of services provided for a resident or for the case in general.

Create a New Service

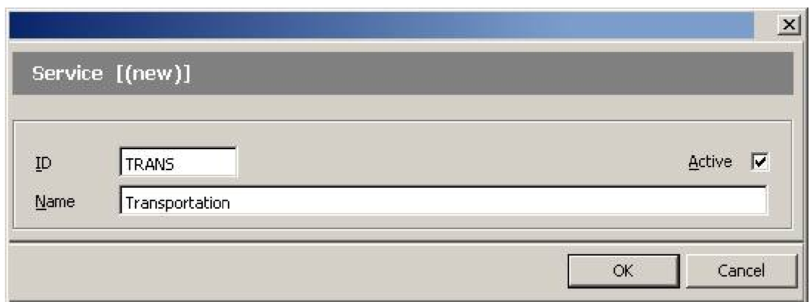
➢ ***To a new service***

1 Click on the **Sytem Admin** bar in the *Navigation* pane.

2 Click on **Services** in the *Navigation* pane. Use the up and down arrows as necessary.

3 Click **New Item** on the toolbar.

-OR- Right click and select **New Item**.



4 Type in an *ID* and a *Name*.

5 Click **OK**.

Edit a Service

➢ ***To change a service name or active status***

1 Click on the **Sytem Admin** bar in the *Navigation* pane.

2 Click on **Services** in the *Navigation* pane. Use the up and down arrows as necessary.

3 Highlight the record you want to change.

4 Click **Edit** on the toolbar.

-OR- Right click and select **Edit Item**.

5 Use the check box to change *Active* status as needed. Modify the *Name* if necessary. You cannot change the *ID*.

6 When finished, click **OK**.

Remove a Service

➤ ***To delete a service***

1 Click on the **Sytem Admin** bar in the *Navigation* pane.

2 Click on **Services** in the *Navigation* pane. Use the up and down arrows as necessary.

3 Highlight the record you wish to remove.

4 On the toolbar, click **Delete**.

-OR- Right click and select **Delete Item**.

5 At the prompt, click **Yes** to continue or **No** to cancel.

Care Managers

OmbudsManager can store the *Care Manager* for each ***Resident*** (see "Residents" on page 85) record.

Create a New Care Manager

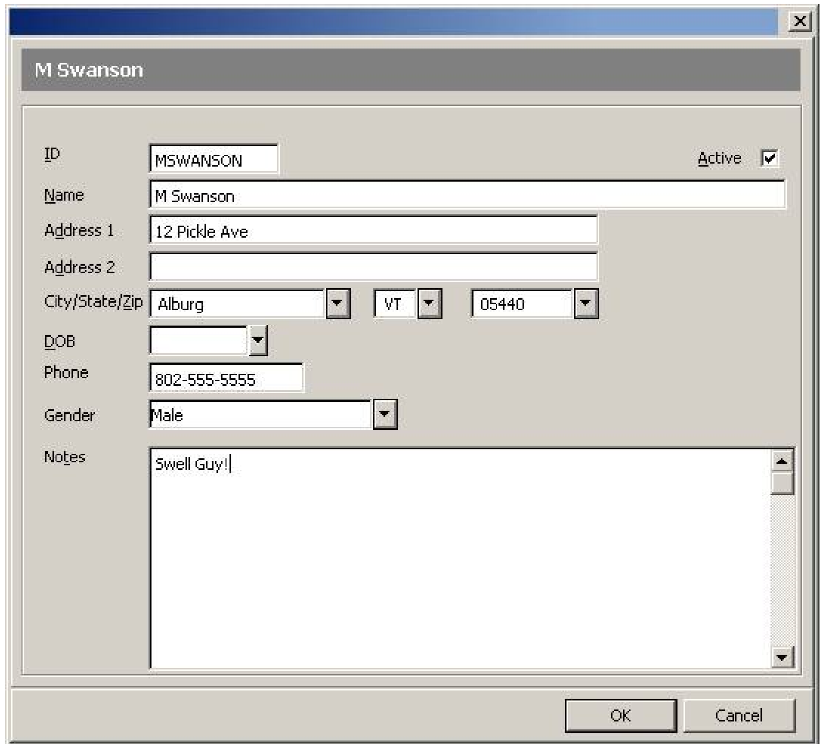
➤ ***To a new care manager***

1 Click on the **Sytem Admin** bar in the *Navigation* pane.

2 Click on **Care Managers** in the *Navigation* pane. Use the up and down arrows as necessary.

3 Click **New Item** on the toolbar.

-OR- Right click and select **New Item**.



4 Type in an *ID* and a *Name*. Enter *Address* and *Phone* information. Enter a *DOB (Date of Birth)* if known. Select a *Gender* and add *Notes* as needed.

5 Click **OK**.

Edit a Care Manager

➢ *To change a care manager record*

1 Click on the **Sytem Admin** bar in the *Navigation* pane.

2 Click on **Care Managers** in the *Navigation* pane. Use the up and down arrows as necessary.

3 Highlight the record you want to change.

4 Click **Edit** on the toolbar.

-OR- Right click and select **Edit Item**.

5 Use the check box to change *Active* status as needed. Modify the *Name, Address and Phone* information, if necessary. Select a new *DOB (Date of Birth)* or *Gender* as needed. Add to or enter new *Notes*. You cannot change the *ID*.

6 When finished, click **OK**.

Delete a Care Manager

➢ ***To delete a care manager***

1 Click on the **Sytem Admin** bar in the *Navigation* pane.

2 Click on **Care Managers** in the *Navigation* pane. Use the up and down arrows as necessary.

3 Highlight the record you wish to remove.

4 On the toolbar, click **Delete**.

-OR- Right click and select **Delete Item**.

5 At the prompt, click **Yes** to continue or **No** to cancel.

Primary Diagnosis

You can select a *Primary Diagnosis* for each ***Resident*** (see "Residents" on page 85) record.

Add a New Primary Diagnosis

➢ ***To a primary diagnosis***

1 Click on the **Sytem Admin** bar in the *Navigation* pane.

2 Click on **Primary Diagnosis** in the *Navigation* pane. Use the up and down arrows as necessary.

3 Click **New Item** on the toolbar.

-OR- Right click and select **New Item**.

4 Type in an *ID* and a *Name*.

5 Click **OK**.

Modify a Primary Diagnosis

➢ ***To change a primary diagnosis***

1 Click on the **Sytem Admin** bar in the *Navigation* pane.

2 Click on **Primary Diagnosis** in the *Navigation* pane. Use the up and down arrows as necessary.

3 Highlight the record you want to change.

4 Click **Edit** on the toolbar.

-OR- Right click and select **Edit Item**.

5 Use the check box to change *Active* status as needed. Modify the *Name* if necessary. You cannot change the *ID*.

6 When finished, click **OK**.

Remove a Primary Diagnosis

➢ ***To delete a primary diagnosis***

1 Click on the **Sytem Admin** bar in the *Navigation* pane.

2 Click on **Primary Diagnosis** in the *Navigation* pane. Use the up and down arrows as necessary.

3 Highlight the record you wish to remove.

4 On the toolbar, click **Delete**.

-OR- Right click and select **Delete Item**.

5 At the prompt, click **Yes** to continue or **No** to cancel.

Importing and Exporting Data

OmbudsManager imports and exports case and activity data. You can export data to archive or to send it to the state level. You can also import new location (Town, County, State, and ZIP Codes) from the locations database.

Exporting from OmbudsManager

OmbudsManager can create an export file that can be used for archival purposes or to import into another copy of OmbudsManager.

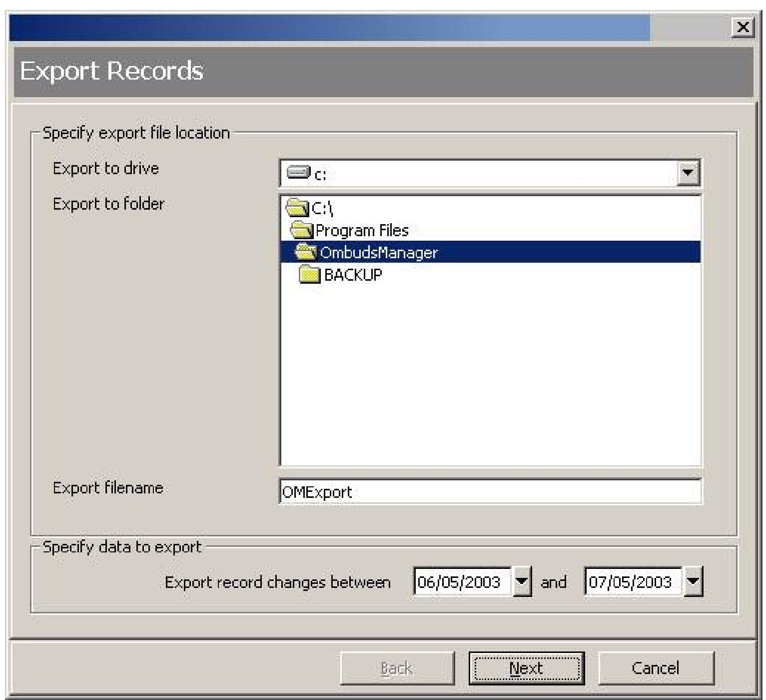
➢ ***To create an OmbudsManager export file***

1 Choose **File** and then **Import and Export...**.

2 Choose *Export to an OmbudsManager export file.*

3 Click **Next>**.

4 Choose where to create the file using *Export to drive*, *Export to folder*, and *Export filename* fields.



5 Choose a date range to the left of *Export record changes between.*

6 Click **Next**.

7 Review the matching *Cases*. Uncheck all the cases you do not wish to export. If you do not want to export any of the matching cases, remove the check from the *One or more of the following cases (and related journal entries)* check box. If necessary, click **Print Grid** to print a list of cases matching the date range specified in step.

8 Click **Activities**. Review all matching activities and click **Print Grid** to print out the activity list, if necessary. Remove the check from any activity you do not wish to import. If you don't want to export any export any of the activities, uncheck *One or more the following activity records:*.

9 Click **Export**.

Importing from OmbudsManager

Import takes files created by an export from OmbudsManager.

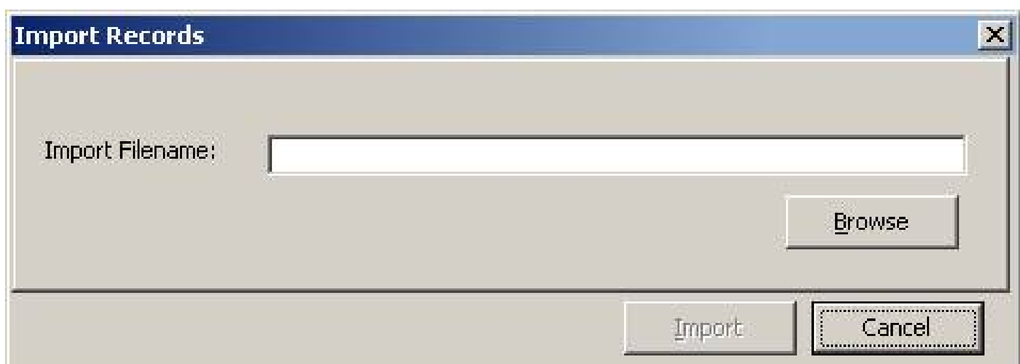
➢ ***To import from an OmbudsManager export file***

1 Choose **File** and then **Import and Export...**.

2 Choose *Import from an OmbudsManager import file.*

3 Click **Next>**.

4 Click the **Browse** button. Find the appropriate OmbudsManager export file and click **Open**.



5 Click **Import**.

6 Choose which files to import on the next screen.

7 Click **Import**.

Importing Additional Towns, Counties, and ZIP Codes

During the setup of OmbudsManager, the program imported Town, County, ZIP Code information to create an instant address database. Run through the procedure below if you would like to import more locations. You'll need the OmbudsManager install CD handy.

The OmbudsManager location import imports towns, counties, ZIP Codes by grouped by county. You'll need to import a whole county even if you need just part of the towns and ZIP Codes in the county.

➢ ***To import counties, towns, and ZIP Codes***

1 Select **Import and Export...** from the **File** menu.

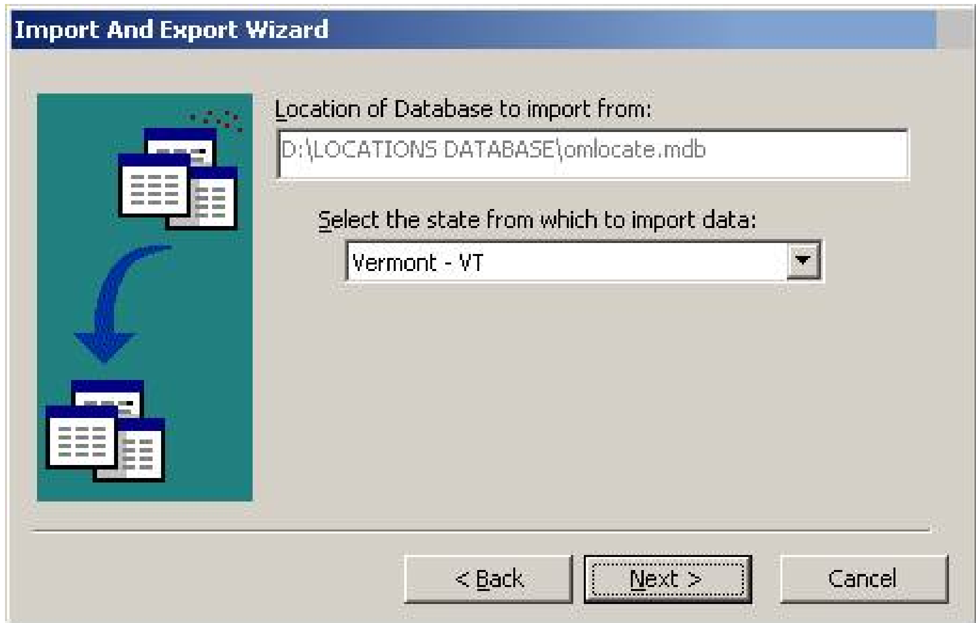
2 Highlight *Import Counties, Towns,* and *Zip Codes*.

3 Insert the OmbudsManager CD-Rom into the drive.

4 Click **Next>**.

5 OmbudsManager will attempt to find the *Locations database.* If you need find it manually, look for a directory on the CD called *Locations Database*. In the directory you will see a file called omlocate.mdb.

6 *Select the state from whish to import data.*



7 Click **Next>**.

8 Check the counties you want to import. Any counties which OmbudsManager previously imported will not be available to import again.

If you need to import location information for the whole state, click **Select All**. Especially for large states, a whole state locations import will take time.

9 Click **Next>**.

10 OmbudsManager will begin importing towns, ZIP codes, and counties into its internal database.

11 When the program has finished, click **OK** at the prompt.

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