

West Virginia Child Advocacy Network
(WVCAN)
Collaborate Training Guide

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Starting with Collaborate

The following screenshots were taken using the Chrome browser. Each browser varies slightly in the way things are displayed on the page, so any slight differences you may encounter during this walkthrough using a different browser is to be expected. It is recommended to use either Chrome or Firefox browser with the Collaborate application, but Internet Explorer Version 8+ is also supported. If you are using an earlier version of IE, you will be required to upgrade to a newer version.

Production Site URL: <https://wvcan.networkninja.com/>

The Production Site is the live site that will be used on a day-to-day basis.

Stage Site URL: <https://wvcan.stage.networkninja.com/>

The Stage site is used solely for testing and training purposes. Data entered on the stage site does not copy over to production site. Real clients should not be entered in the stage site.

Login Screen

The Login Screen is where you will log into Collaborate with your username and password. This page also contains the “Forgot your password?” link.



The screenshot shows the login interface for Collaborate. At the top, there is a blue header with the 'collaborate' logo. Below the header, the 'wvcan' logo is displayed, featuring a circular icon with a heart and mountains. The login form consists of two input fields: 'Username' and 'Password'. Below the 'Password' field, there is a blue 'Login »' button, a checkbox for 'Remember username?', and a blue link for 'Forgot your password?'.

Your username will be provided to you in an email once your account has been created. Administrators have the ability to create user accounts. More information regarding the login process follows.

Activation Links

As a new user, you should have received an email with your username & an activation link. If you have not received an email, then you must request an account from your System Administrator. Activation links are active for 4 days. If your activation link has expired, please reach out to your supervisor or admin so that they may send you a new activation link email.

Hello Test User 1,

A new account has been created for you. Listed below is your username and activation link. Click the link to be forwarded to the application and set up your account. You will be asked to set your password immediately.

Username: Test User 1

Activation Link: https://wvcan.stage.networkninja.com/?activation_code=b2e35b31f24a0c3c9c69ba0183d8b2c85d7e440b

For your security this link is only active for 4 days and will expire at 03/16/2019 11:31 am.

<https://wvcan.stage.networkninja.com>

Thank you,

WVCAN

cacdev@networkninja.com |

– Sent by Collaborate WVCAN v1.0

Clicking on the activation link will take you to a screen where you will create your own unique password. The Password Rules are determined by your System Administrator. As seen below, enter your new password and confirm it in the second text box, then click continue. This will now be your password moving forward. If you forget your password, you can click on the “Forgot your password?” link on the login page. If you have failed multiple attempts at logging in, you will be locked out of your account. If you are locked out of your account, contact your System Administrator.

✔ Please Change your Password

Password

Password Rules

- Must be at least 8 characters
- Must have at least one uppercase letter in it
- Must have at least one lowercase letter in it
- Must have at least one special character in it (e.g. !@#%&*)
- Must have at least one number in it
- Cannot be a word ending with 1, 12, 123, 1234

Password*

Confirm Password*

Continue »

You will now be forwarded to your profile page where you can enter additional contact information.

The screenshot shows the Collaborate user profile page for 'Test User 1'. At the top, there is a navigation bar with tabs for Home, Cases, Calendar, Case Reviews, Documents, Contacts, Organizations, Reports, and Staff and Sites. Below the navigation bar is a breadcrumb trail: Home > Contacts > Test User 1 > Details. A 'Password Saved' notification is visible at the top left. The main content area is divided into two sections: 'Contact Information' and 'Organization Affiliation'. The 'Contact Information' section includes fields for Name (Test User 1), Email* (bmulvihill@networkninja.com), Title or Position (N/A), Supervisor (N/A), Contact Type (N/A), and Assigned Sites (Randolph-Tucker CAC). The 'Organization Affiliation' section includes Organization (Network Ninja Inc.) and Title or Position (N/A). On the right side, there is a sidebar with 'Options' (Contact List, Create New Contact) and 'Contact Status' (Test User 1 (Manage Status)). The 'Contact Status' section contains a table with the following data:

Test User 1 (Manage Status)	
Contact Active	Yes
User Record Active	Yes
Login Active	Yes

Now click on the Home navigation tab located near the top left of the screen, directly under the Collaborate title. This will take you to the home page, which is where you will always be taken to when you log in to the application going forward (unless your password has been reset, in which case you will need to complete the previous password reset step again).

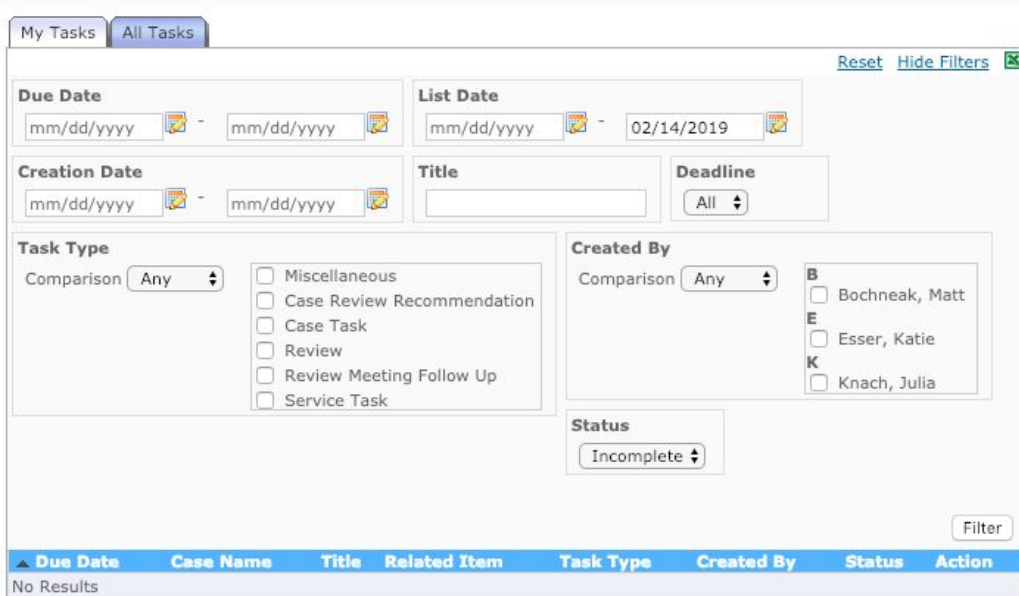
Home Page

Navigation Tabs

- Home - View your case assignments, tasks and recent cases, as well as create new cases
- Cases - List of all cases in the system
- Calendar - View and edit Calendar
- Case Reviews - Review requested Case Reviews and schedule Case Review Staffings
- Documents - Build new documents and templates, upload documents, and view documents (pending permissions granted by your administrator)
- Contacts - Contact Management
- Organizations - Organization Management
- Reports - Build new reports, and view or run existing reports (pending permissions granted by your administrator)
- Staff and Sites - View and manage Staff and Sites (pending permissions granted by your administrator)

Listviews - The Case Assignments, Tasks, and Recent Cases lists are examples of listviews. Listviews list information in a table format. For the most part, all listviews around the application function in this way. On the top right side of each listview are up to 3 options that vary depending on the listview.

1. **Reset** will refresh the information listed in the listview, in case something has changed behind the scenes via other user(s) activity. Reset will also reset any Filters you have in place.
2. **Show/Hide Filters** will drop down a list of options that you can use to filter the results returned in a listview. This can be very useful when viewing a listview with a lot of options to quickly filter down the options to find the exact one you are looking for.
 - a. Pictured below is what the Tasks listview looks like with filters expanded out. Depending on the type of field you are wanting to filter, there is an appropriate filter field to make filtering as easy as possible. You can filter on just one field, or every field for which there is a corresponding filter. Once you have set all of your desired filter options, simply click the Filter button and the results will be updated. Most listviews through the application have the ability to Filter on certain columns. Keep in mind that filters are “sticky,” meaning once you set them, they stay that way until you change or Reset the filters.



Due Date	List Date	Creation Date	Title	Deadline	Task Type	Created By	Status
mm/dd/yyyy	mm/dd/yyyy	mm/dd/yyyy		All	<input type="radio"/> Miscellaneous <input type="radio"/> Case Review Recommendation <input type="radio"/> Case Task <input type="radio"/> Review <input type="radio"/> Review Meeting Follow Up <input type="radio"/> Service Task	<input type="radio"/> Bochner, Matt <input type="radio"/> Esser, Katie <input type="radio"/> Knach, Julia	Incomplete

Due Date	Case Name	Title	Related Item	Task Type	Created By	Status	Action
No Results							

3. **Export to Excel** - The third option in a listview allows you to export the results currently displayed in the listview to an Excel document. Simply click the green Excel icon in the top rightmost corner and a save dialog will open. If you want any filters applied to the Excel document, make sure you have clicked the filter button and the results have been updated in the list before exporting to Excel. Please note that this option is not available in some listviews.

Case Assignments - Assignments allow you to assign an entire case, or a particular service on that case, to another Collaborate user. You can set assignments to start and end on specific dates.



My Tasks / All Tasks - Tasks are a way of setting reminders with due dates and a status. All of your outstanding tasks will display in this home page list. You can add a “New Task” from the Calendar for custom Tasks.

Recent Cases - This is a list of the most recent cases you have accessed (clicked on).

Creating a New Case

There are two ways to navigate to the Client creation screen:

1. From the home page, click Create New Client under the Create New Case box on the right side of the screen:

The screenshot shows the Collaborate home page. At the top, there is a navigation bar with tabs for Home, Cases, Calendar, Case Reviews, Documents, Contacts, Organizations, Reports, and Staff and Sites. Below this is a search bar and links for Send Message, Preferences, and Hide Taskbar. The main content area is divided into three sections: Case Assignments, My Tasks, and Recent Cases, each with a table and filters. On the right side, there is a Search panel with fields for Type, First name, Last name, Suffix/Second last name, and DOB. Below the search panel is a 'Create New Case' box with three options: Create New Client, Create New Associated Person, and Create New Pre-Intake.

2. From the Home page, you can navigate to the Cases tab, where you will have the same options:

The screenshot shows the Collaborate Cases page. The navigation bar is the same as the home page, but the 'Cases' tab is selected. Below the navigation bar, there is a search bar and links for Send Message, Preferences, and Hide Taskbar. The main content area shows a 'Cases' section with a table of cases and filters. On the right side, there is a 'Create New Case' box with three options: Create New Client, Create New Associated Person, and Create New Pre-Intake.

As displayed in the image above, under the Create New Case box, along the right side of the screen, there are two options:

- **Create New Client** - This is the standard intake process that creates a new client and a new case for this client
- **Create New Associated Person** - This intake process has minimal demographic questions and is intended for related/associated people of the Client (i.e. Parents, family members)
- **Create New Pre-Intake** - Pre-Intakes are performed when a potential client calls in or is referred to a center.

From the Cases page, you can create a new case, and view all cases in the system (if your role permits you to view cases). For this portion of the guide, we are going to focus on creating a new client.

Click the Create New Client option. You should now see the following conflict check screen.

Client Identification

Conflict Check Required
 Before you create a new Client, please perform a search to ensure the Case does not already exist in Collaborate.

Name (First*, MI, Last*, Suffix)	<input type="text" value="First Name"/> <input type="text" value="Middle"/> <input type="text" value="Last Name*"/> <input type="text" value="Suffix"/>
Date of Birth	<input type="text" value="mm/dd/yyyy"/> <input type="button" value="📅"/> Age: N/A
Social Security #	<input type="text"/>
<input type="button" value="Search"/>	

Conflict Check

Before creating a new case you are required to perform a **conflict check**. Conflict checks search existing cases in the system to ensure that there is not already a case for the client being checked in. Only the first and last name are required and are a good place to start. If you do not know the name of the client, you can select No for the “Has this person been identified?” question.

Below is an example search where there is already an existing client in the system:

Client Identification

Has this person been identified? Yes No

Conflict Check Required
 Before you create a new Client, please perform a search to ensure the Case does not already exist in Collaborate.

Name (First*, MI, Last*, Suffix)	<input type="text" value="Test"/> <input type="text" value="Middle"/> <input type="text" value="Client"/> <input type="text" value="Suffix"/>
Date of Birth	<input type="text" value="mm/dd/yyyy"/> <input type="button" value="📅"/> Age: N/A
Social Security #	<input type="text"/>
<input type="button" value="Search"/>	



Viewing Only Result

Name	Gender	DOB	Intake Date	Score	
Test Client	N/A	N/A	01/11/2018	★★★★☆	<input type="button" value="Create New Case For Client"/>

No Other Pages

For the Create New Client portion of this guide, we will search for a name that does not already exist.

The resulting search will look the same as above, but with no items in the listview (see example below):

Client Identification						
Conflict Check Required Before you create a new Client, please perform a search to ensure the Case does not already exist in Collaborate.						
Name (First*, MI, Last*, Suffix)	<input type="text" value="New"/>	Middle	<input type="text" value="Client"/>	Suffix		
Date of Birth	<input type="text" value="mm/dd/yyyy"/>		Age: N/A			
Social Security #	<input type="text"/>					
<input type="button" value="Search"/>						
Reset 						
Name	Intake Date	SSN	Address	Gender	DOB	Score
No Results						
<input type="button" value="Create New Client"/>						

Once the Conflict Check has run, click on the Create New Client button.

Filling Out Intake

Clicking the Create New Client button will take you to the first step of the intake process.

✔ Saved

New Person

Referral Information, Client Details

Intake Date*

Has this person been identified? Yes No

Name (First*, Middle, Last*, 2nd Last/Suffix)

Social Security #

DOB Status


Date of Birth* Age: N/A

Approximate DOB Yes No

Referral Information

Date of Referral

Client Profile


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- 1. Referral Information, Client Details**
2. Allegations/Reported Abuse
3. Family Members, Custody
4. MDIT, Client History
5. Behavior Changes, Mental Health
6. Insurance, Medical Information
7. Client Profile

This Intake is incomplete.

New Person

Case Type	Client [Edit Intake]
ID #	19-0001232
Created by	Test User 1
Case Status	Incomplete Intake
Case Review Status	None (Request Case Review)

The right side of the screen has the **intake process overview**. The step you are currently on is in **bold**. As you step through the intake and complete each section, the previous sections will show up as a link so you can easily navigate around. You are required to step through the intake in order however, so until you complete the previous step, the next steps will not be available. Once the entire intake is completed, all steps will be links for easy editing.

The **client snapshot (or client summary)** is also located on the right side of the screen, directly below the intake overview. This provides a quick overview of the client and should display all relevant information necessary to represent the status of a client's case at a glance. Some of the options may be updated directly from the snapshot. These options have blue title text and are links that you can click on. You will then be forwarded to the appropriate page to update the existing value for that option. It is recommended to complete the intake process before updating any of these options.



New Person	
Case Type	Client [Edit Intake]
ID #	19-0001232
Created by	Test User 1
Case Status	Incomplete Intake
Case Review Status	None (Request Case Review)

We will now look at some individual fields of the intake to demonstrate different types of data and how they are collected in Collaborate.

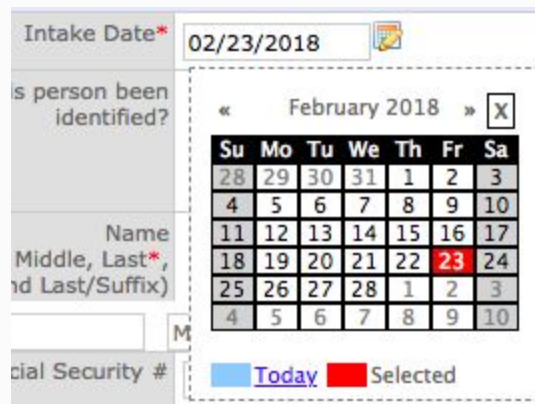
Aliases

If a client has any **Aliases** (e.g. maiden name, nickname, Chuck v. Charles), this information can be added during intake. Multiple Aliases can be added by pressing the Add Item button. Also, Aliases can be removed by clicking the Remove Item button. Aliases will appear on the Client Profile page once the Intake has been completed.

New Client

Intake Information	
Intake Date*	<input type="text" value="02/23/2018"/> 
Has this person been identified?	<input checked="" type="radio"/> Yes <input type="radio"/> No
Name (First*, Middle, Last*, 2nd Last/Suffix)	<input type="text" value="Client"/> <input type="text" value="New"/> <input type="text" value="Middle"/> <input type="text" value="Suffix"/>
	<input type="button" value="Hide Aliases"/>
Aliases	
	<input type="button" value="Remove Item"/>
Additional Name (First*, Middle, Last*, 2nd Last/Suffix)	<input type="text" value="First*"/> <input type="text" value="Middle"/> <input type="text" value="Last*"/> <input type="text" value="Suffix"/>
Alias Type*	<input type="text" value="Please Select"/> 
Notes	<input type="text" value="Notes"/>

Date Fields



Intake Date* 02/23/2018

Has person been identified?

Name (Middle, Last*, and Last/Suffix)

Medical History

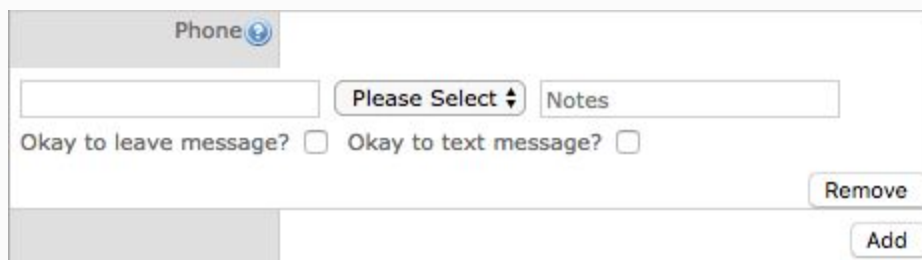
Social Security #

Su	Mo	Tu	We	Th	Fr	Sa
28	29	30	31	1	2	3
4	5	6	7	8	9	10
11	12	13	14	15	16	17
18	19	20	21	22	23	24
25	26	27	28	1	2	3
4	5	6	7	8	9	10

Legend: Today (blue square), Selected (red square)

Date fields require a very specific format: MM/DD/YYYY. If the date is not entered in that format, the value will fail validation and you will be required to fix it before moving on. To ensure proper format, it is recommended to use the datepicker that is available on all date fields. Click the calendar icon to the right of the date field to view the datepicker and choose a date. Also, there are some date fields where the default value will automatically be set to the current day's date. As demonstrated here, the initial intake date is assumed to be the current date, but if that is incorrect, you can still update it. In some cases around the application, this "created on" date will not be editable and the date will simply show up as text.

Toggler Rows



Phone

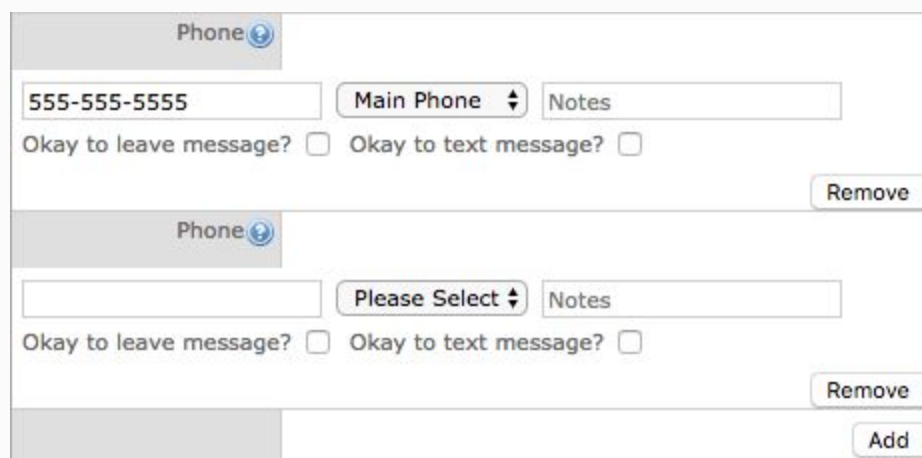
Please Select Notes

Okay to leave message? Okay to text message?

Remove

Add

In several places throughout the application, you will encounter "Add" buttons in the middle of a form that, when clicked, will expand more questions or allow you to add more entries. These are called **Toggler Rows**. In the examples above and below, if you click the "Add" button, it will display another form to collect additional numbers.



Phone

555-555-5555 Main Phone Notes

Okay to leave message? Okay to text message?

Remove

Phone

Please Select Notes

Okay to leave message? Okay to text message?

Remove

Add

Dropdown



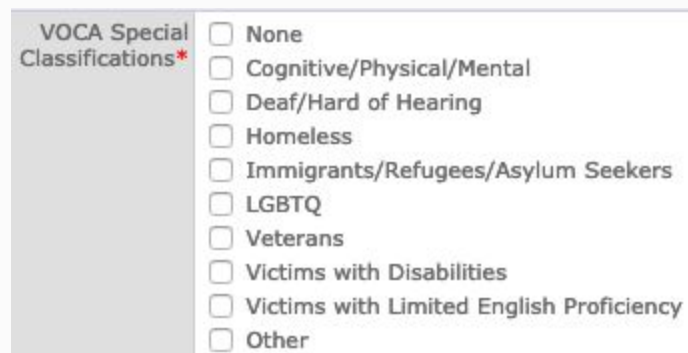
Dropdown fields allow you to choose a single value from a predefined list of options. It is important to note that most dropdown fields are editable by your system administrator. If you notice that there is an incorrect option that should be removed, or an additional option that needs to be added, let the admin know and they will be able to correct it without having to submit a ticket to Collaborate.

Other Dropdown



Some of the dropdown fields have an “Other” option which, when selected, will drop down a text field to provide a custom value that is not listed in the select dropdown. These are called **Other Dropdowns**. If you notice that you are regularly using the “Other” option for a value that is not listed, it is very important to report that to your system administrator so they can add that option as it makes it difficult to report on values that are not already listed in the select dropdown.

Multi Checkbox Select



Multi Checkbox Selects are also very common throughout the application. They work similarly to dropdowns, but instead are displayed as checkboxes and allow you to select multiple values. As with the dropdowns, all values are editable by the administrator. Some multi checkbox selects will also contain an “Other” option, which will display the Other text field below for a custom value.



Search Box Select

Primary Language	Spanish <input type="text"/>
Secondary Language	Spanish <input type="text"/>

Search Box Selects, such as the Primary Language example above, will appear as a blank text field, with a magnifying glass in the right side of the field. To use this field, simply start typing the word you are looking for and any matching values will be returned. An important note when using this field type: You **MUST** either hit Enter to select the value, or click on one of the values returned in order to select it. If you simply type the entire value out in the field without selecting an option, that value will not be saved. You can confirm the value has been added by seeing the name added above the search box as shown below.

Primary Language	Spanish [Remove] <input type="text"/>
------------------	---

The search box select works similarly to dropdowns, meaning the values can be managed by the administrator. For example, if your search is not returning the expected language, you would need to contact your admin to have them add the language to the list. If you accidentally add the wrong value from returned results, you can simply click the blue [\[Remove\]](#) button, and that option will be removed. Alternatively, you can also perform another search, click the correct value, and the previous value will be replaced.

There are several places around the application that allow for adding multiple values from a search box, in which case, each time you click a returned result, it will be added to the existing values above the search box. These types of search boxes will have additional text in the field label that indicate multiple values can be added.

Service Provider (Contact) Search for contacts by name, can add multiple	Network Ninja Staff [Remove]
	Test Intern [Remove]
	Test User [Remove]
	<input type="text"/>

Zip Code Search/Autofill

For address fields, the application allows you to enter the zip code first which will search the database and auto populate the city and state values. This is called an **Autofill**. If you enter a zip code and the city and state are not automatically updated, that zip code has not been entered into the database. For performance reasons, only the state your organization is in is loaded into the database. If you find yourself regularly entering out of state clients, notify your administrator and they can coordinate with the Collaborate staff to add the additional state to the database.

Zip Code	<input type="text"/>
Street Address	<input type="text"/>
Apt#/Suite#	<input type="text"/>
City, State	<input type="text" value="City"/> , <input type="button" value="AL"/>
County*	<input type="button" value="Please Select"/> <input type="checkbox"/> Show All Values

1. Begin typing the zip code into the Zip Code field. As you type, the system will search the database for matching zip code results.

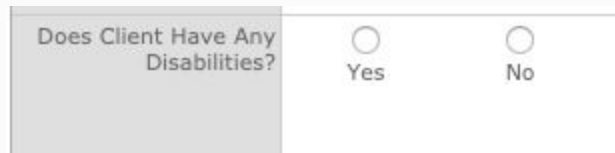
Zip Code	<input type="text" value="2530"/>	<ul style="list-style-type: none">25301 - Charleston - Kanawha County - WV25302 - Charleston - Kanawha County - WV25303 - Charleston - Kanawha County - WV25304 - Charleston - Kanawha County - WV25305 - Charleston - Kanawha County - WV25306 - Charleston - Kanawha County - WV25309 - Charleston - Kanawha County - WV
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2. You can either type the full zip code, or select from the populated options.

Zip Code	<input type="text" value="25301"/>
Street Address	<input type="text"/>
Apt#/Suite#	<input type="text"/>
City, State	<input type="text" value="Charleston"/> , <input type="button" value="WV"/>
County*	<input type="button" value="Kanawha"/> <input type="checkbox"/> Show All Values

3. Once you have entered or selected the zip code, the program will autofill the City, State, and County for you.

Conditional Questions



There are many places throughout the application that will ask one question, and depending on the answer provided, will possibly ask additional related information. This is called a **Conditional Question**. A basic example of this is the Disabilities question. When the answer “Yes” is selected, the details field will drop down so you can provide further information, if known and/or available.



Contact/Organization Search



This is another type of search box which allows you to search for existing Contacts, and Organizations. The example used above is for Contacts, but the same functionality is similarly used for Organizations (use the button for organization instead of searching). There will be text below the label that identifies which type of search addable field it is, for example Search for contacts.

As with the Search Box Select, you simply start typing the name of the contact or organization you are looking for, and any related results will be returned. The difference with this box is, when you search for an item that does not exist (e.g. the Test Contact in the picture above has not yet been entered into the system), a result will be returned that says “No Results.”

Required Fields

Some questions/fields in Collaborate are required. Required Fields are indicated by a red asterisk after the question.

Date of Birth*	<input type="text" value="mm/dd/yyyy"/>	Age: N/A
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If a question is required, you will not be able to continue to the next step of the intake process until that question has been answered. An example of this is the Date of Birth question on the first step of intake. If you do not provide a value and try to click the Continue button at the end of the form, you will get a validation error notifying you of the issues blocking you from continuing. You can click on the error to go directly to the question that is causing this validation:

Test Person

 [Last Name is required](#)

Client Details			
Intake Date*	<input type="text" value="02/14/2019"/>		
Has this person been identified?	<input checked="" type="radio"/> Yes	<input type="radio"/> No	
Name (First*, Middle, Last*, 2nd Last/Suffix)	<input type="text" value="Test"/>	<input type="text" value="Middle"/>	<input type="text" value="Last Name*"/>
	<input type="text" value="Suffix"/>		
<input type="button" value="Show Aliases"/>			


This should now give you enough information about working with forms in Collaborate to complete the rest of the intake.

If you select the Save & Continue button on the first step of intake, but do not complete the full intake process for the client, the Case Status will be marked “Incomplete Intake.” This will be indicated by a notice at the top of the profile with a link to Resume Client Intake.

Incomplete Intake
 The intake process for this Case was not completed. [Resume Client Intake](#)

There will also be a notification (also containing a Resume Intake link) on the right side of the page in the Client Profile section. In order for the case status to be Open, you must complete all steps of the intake.

Client Profile


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1. [Referral Information, Client Details](#)
2. **Allegations/Reported Abuse**
3. Family Members, Custody
4. MDIT, Client History
5. Behavior Changes, Mental Health
6. Insurance, Medical Information
7. Client Profile

This Intake is incomplete. [Resume Intake »](#)

New Person

Case Type	Client [Edit Intake]
ID #	19-0001232
Created by	Test User 1
Case Status	Incomplete Intake
Case Review Status	None (Request Case Review)

Once you have completed the final intake step, you will be forwarded to the Intake Profile page and see that the case status is now Open.

New Person

Case Type	Client [Edit Intake]
ID #	19-0001232
Created by	Test User 1
Case Status	Open
Case Review Status	None (Request Case Review)

Client Profile Page Overview

Below is an example of the Client Profile Page once the Intake process has been completed:

New Person

- Referral Information, Client Details
- Allegations/Reported Abuse
- Family Members, Custody
- MDIT, Client History
- Behavior Changes, Mental Health
- Insurance, Medical Information
- Associated Relationships

Referral Information, Client Details	
Intake Date	03/12/2019
Has this person been identified?	Yes
Name	New Person
Social Security #	N/A
DOB Status	Known
Date of Birth	03/12/2009
Approximate DOB	No
Referral Information	
Date of Referral	N/A
Referral Type	Other
Current Need for Therapy	N/A
Other Referral Type	test other referral type
Referral Source	N/A
Is this a Courtesy Case?	No
Client Demographics	
Biological Sex	Female
Gender Identity	N/A

Client Profile



wvcan

✓ Client Intake was completed on 03/12/2019 at 12:59 PM by Test User 1.

[\[Edit Intake\]](#)

 [View Intake Summary](#)

 [Save Intake Summary](#)

New Person

Case Type	Client [Edit Intake]
ID #	19-0001232
Created by	Test User 1
Case Status	Open
Case Review Status	None (Request Case Review)

Add a New Service

Elaborate Services

Please Select...

Simple Services

Please Select...

Relationship Actions

Now take a look at the Relationship Actions box on the right side of the screen, beneath the Client Profile, and Add a New Service boxes.

Test Person

Case Type	Client [Edit Intake]
ID #	19-0001284
Created by	Brian Mulvihill
Case Status	Open
Case Review Status	None (Request Case Review)

Add a New Service

Elaborate Services

Please Select... ▾

Conduct Schedule

Simple Services

Please Select... ▾

Conduct Schedule

[Quick Batch Simple Service](#)
[Batch Simple Service](#)


Relationship Actions

[Add a New Relationship](#)
[Edit Existing Relationships](#)

[Quick Add Associated Cases](#)
[Create a New Associated Client](#)
[Create a New Associated Person](#)
[Create a New Alleged Offender](#)

This is where you will create a new Associated Client, Associated Person, and/or Alleged Offender. Notice there is also a Quick Add Associated Cases link. The Quick Add Associated Cases page allows you to add basic information for associated cases (no matter the case type) all on one page. Keep in mind that, when creating cases this way, you will be creating Incomplete cases that you will need to go back and edit so that they are updated to Open status.


For this walkthrough we will create a New Alleged Offender. To do so, start by clicking the Create a New Alleged Offender link. You will be taken to the following page:

Associated Intake	
The system will automatically create the specified relationship between the existing person and the new Alleged Offender. You will have a chance to review and add additional relationships during the Intake process.	
ID #	18-0001146
Name	Test Client
Relationship	Test Client is the Unknown of the New Alleged Offender
Alleged Offender Identification	
Has this person been identified?	<input checked="" type="radio"/> Yes <input type="radio"/> No
Conflict Check Required Before you create a new Alleged Offender, please perform a search to ensure the Case does not already exist in Collaborate.	
Name (First*, MI, Last*, Suffix)	<input type="text" value="First Name"/> <input type="text" value="Middle"/> <input type="text" value="Last Name*"/> <input type="text" value="Suffix"/>
Date of Birth	<input type="text" value="mm/dd/yyyy"/>  Age: N/A
Social Security #	<input type="text"/>
<input type="button" value="Search"/>	

Create New Case

[Create New Client](#)
[Create New Associated Person](#)
[Create New Referral](#)

In the top section, you will see the Case ID of the Primary Client to whom this Alleged Offender is related. You have the option to set a Relationship, if one exists. For this example, we will choose Neighbor.

Associated Intake	
The system will automatically create the specified relationship between the existing person and the new Alleged Offender. You will have a chance to review and add additional relationships during the Intake process.	
ID #	18-0001146
Name	Test Client
Relationship	Test Client is the Neighbor of the New Alleged Offender
Alleged Offender Identification	
Has this person been identified?	<input checked="" type="radio"/> Yes <input type="radio"/> No
Conflict Check Required Before you create a new Alleged Offender, please perform a search to ensure the Case does not already exist in Collaborate.	
Name (First*, MI, Last*, Suffix)	<input type="text" value="First Name"/> <input type="text" value="Middle"/> <input type="text" value="Last Name*"/> <input type="text" value="Suffix"/>
Date of Birth	<input type="text" value="mm/dd/yyyy"/>  Age: N/A
Social Security #	<input type="text"/>
<input type="button" value="Search"/>	

Create New Case

[Create New Client](#)
[Create New Associated Person](#)
[Create New Referral](#)

Now, just like before, you will perform a Conflict Check search to ensure that this person does not already exist in the system. Once you are ready, select the Create New Alleged Offender button to create the case and you will be forwarded to the intake screen.

✔ Saved

Test Neighbor

Alleged Offender Information

Intake Date*

Has this person been identified? Yes No

Name (First*, Middle, Last*, 2nd Last/Suffix)

Social Security #

DOB Status

Date of Birth* Age: N/A

Approximate DOB Yes No

Alleged Offender Profile

- Alleged Offender Information
- Associated Relationships
- Alleged Offender Profile

This Intake is incomplete.

Test Neighbor

Case Type	Alleged Offender [Edit Intake]
ID #	19-0001233
Created by	Test User 1
Case Status	Incomplete Intake
Case Review Status	None (Request Case Review)

You will notice that the intake for an Alleged Offender is not the same as the intake for a Client. All intake types will be different.

Once you complete the intake and are on the profile page, you will be taken to the Associated Relationships page for this particular Alleged Offender. If you have more relationships to add to this offender, you can do that here. You can also view the relationship that was just added by viewing the bottom of the screen. Once you are done adding any applicable relationships to this offender, click the Continue button and you will be taken to the Alleged Offender profile page.

✔ Alleged Offender Intake Form is now complete!

Associated Relationships for Test Neighbor

Create New Relationship

Existing Associated Case

OR

Search All Cases

Relationship to Test Neighbor*

Start date

End date

Edit Existing Relationships

New Person (Neighbor) (Client) is the

of **Test Neighbor** from to

Alleged Offender Profile

✔ Alleged Offender Intake was completed on 03/12/2019 at 1:28 PM by Test User 1.

[\[Edit Intake\]](#)

[View Intake Summary](#)

[Save Intake Summary](#)

Test Neighbor

Case Type	Alleged Offender [Edit Intake]
ID #	19-0001233
Created by	Test User 1
Case Status	Open
Case Review Status	None (Request Case Review)

From the Alleged Offender profile page, you can navigate to the Associated Relationships tab to view all relationships to that case.

Test Neighbor

Alleged Offender Information Associated Relationships

Viewing Only Result [Reset](#)

ID #	Name	Case Type	Relationship to Test Neighbor
19-0001232	New Person	Client	Neighbor

No Other Pages

Services Assignments Task List Alerts Related Cases

[Reset](#) [Show Filters](#)

▼ Date of Service Service Type Service Location Provider Appointment Status

No Results

Case Notes Documents

Add a Case Note

[Reset](#) [Show Filters](#) [Download as PDF](#)

No Results

Alleged Offender Profile

Alleged Offender Intake was completed on 03/12/2019 at 1:28 PM by Test User 1. [\[Edit Intake\]](#)

[View Intake Summary](#)

[Save Intake Summary](#)

Test Neighbor

Case Type	Alleged Offender [Edit Intake]
ID #	19-0001233
Created by	Test User 1
Case Status	Open
Case Review Status	None (Request Case Review)

You will see the related Client case listed. Click on the ID# to be taken back to the client case. From that profile you can also view the Associated Relationships, which will list the Alleged Offender, and any other related cases you create.

New Person

Referral Information, Client Details Allegations/Reported Abuse

Family Members, Custody MDIT, Client History Behavior Changes, Mental Health

Insurance, Medical Information Associated Relationships

Referral Information, Client Details

Intake Date	03/12/2019
Has this person been identified?	Yes
Name	New Person
Social Security #	N/A
DOB Status	Known
Date of Birth	03/12/2009
Approximate DOB	No

Referral Information

Date of Referral	N/A
------------------	-----

Client Profile

Client Intake was completed on 03/12/2019 at 12:59 PM by Test User 1. [\[Edit Intake\]](#)

[View Intake Summary](#)

[Save Intake Summary](#)

New Person

Case Type	Client [Edit Intake]
ID #	19-0001232
Created by	Test User 1
Case Status	Open
Case Review Status	None (Request Case Review)

Changing Case Types

From a Client Profile page, take a look at the status bar on the right side of the screen that identifies the Case Type and Case Status. This is called the **Client Snapshot**. You are able to update the Case Type via this Client Snapshot.

New Person

Referral Information, Client Details		Allegations/Reported Abuse	
Family Members, Custody		MDIT, Client History	
Insurance, Medical Information		Behavior Changes, Mental Health	
Associated Relationships			
Referral Information, Client Details			
Intake Date	03/12/2019		
Has this person been identified?	Yes		
Name	New Person		
Social Security #	N/A		
DOB Status	Known		
Date of Birth	03/12/2009		
Approximate DOB	No		
Referral Information			
Date of Referral	N/A		

Client Profile

✔ Client Intake was completed on 03/12/2019 at 12:59 PM by Test User 1.
[\[Edit Intake\]](#)

[View Intake Summary](#)
[Save Intake Summary](#)

New Person

Case Type	Client [Edit Intake]
ID #	19-0001232
Created by	Test User 1
Case Status	Open
Case Review Status	None (Request Case Review)

You may change the case type by clicking on the “Case Type” link. After clicking on the link, you will be taken to the following page:

Change Intake Type for Cases

- The current intake for the Case is highlighted below.
- To set a new type, click the new option and the intake process will start.

Case to Change Intake type*

Search for Cases by Case number or Case name

[New Person \(19-0001232\)](#)
Intake Date: 03/12/2019

Client

[Associated Person](#)

[Alleged Offender](#)

[Pre-Intake](#) [Remove]


Notice that the case is already listed as the case whose case type should be changed. However, you can change this case by searching for another case in this search box. As noted on the screen, you may search by case number or name. You will also notice that the current case type is highlighted. Here you may select the new case type that you want assigned to the case.

In this example, we have selected Associated Person as the new case type. Please note that, as soon as you select the new case type, you will be routed back to that case profile page, and can see the new case type reflected. Be sure to complete the intake process after you have updated the case type.

New Person

Person Information	
Intake Date*	03/12/2019
Has this person been identified?	<input checked="" type="radio"/> Yes <input type="radio"/> No
Name (First*, Middle, Last*, 2nd Last/Suffix)	<input type="text" value="New"/> <input type="text" value="Middle"/> <input type="text" value="Person"/> <input type="text" value="Suffix"/>
	<input type="button" value="Show Aliases"/>
Social Security #	<input type="text"/>
DOB Status	Known
Date of Birth*	03/12/2009 Age: 10
Approximate DOB	<input type="radio"/> Yes <input checked="" type="radio"/> No

Associated Person Profile



1. Person Information
 2. Associated Relationships
 3. Associated Person Profile

This Intake is incomplete.

New Person

Case Type	Associated Person [Edit Intake]
ID #	19-0001232
Created by	Test User 1
Case Status	Incomplete Intake
Case Review Status	None (Request Case Review)

Documents

Documents functionality is available in most parts of the application. You can upload documents from client profiles, services, and notes. To upload documents, start on a client profile, select Manage Documents, under the Actions box on the right side toolbar.



This will take you to the Documents page:

Add a Document

Upload a Document | Document Templates

Document Title	<input type="text"/>
File Name	<input type="text"/>
If 'Document Title' is empty, the file name will be used.	
Type*	Please Select
Content	<input type="text"/>
Preview	<input type="text"/>
To replace the existing file, upload a new one.	
File Name*	<input type="button" value="Choose File"/> No file chosen
<input type="button" value="Upload and Add Another"/>	
<input type="button" value="Continue »"/> <input type="button" value="Cancel"/>	

Document Actions

- [Create a new document](#)
- [Browse Documents](#)
- [Search Documents](#)
- [Create a Folder](#)
- [Add Document Template](#)
- [Return to Case Profile](#)

Test Client

Case Type	Client [Edit Intake]
ID #	18-0001146
Program History	None
Created by	Steve Cornelison
Case Status	Open

When uploading a document, you have the option to set a Document Title. While it is not required to fill out these fields, it is highly recommended that you enter information into these fields. Doing so will allow you to easily find the documents in the future. If you leave the Document Title empty, the title will default to the file name that is uploaded.

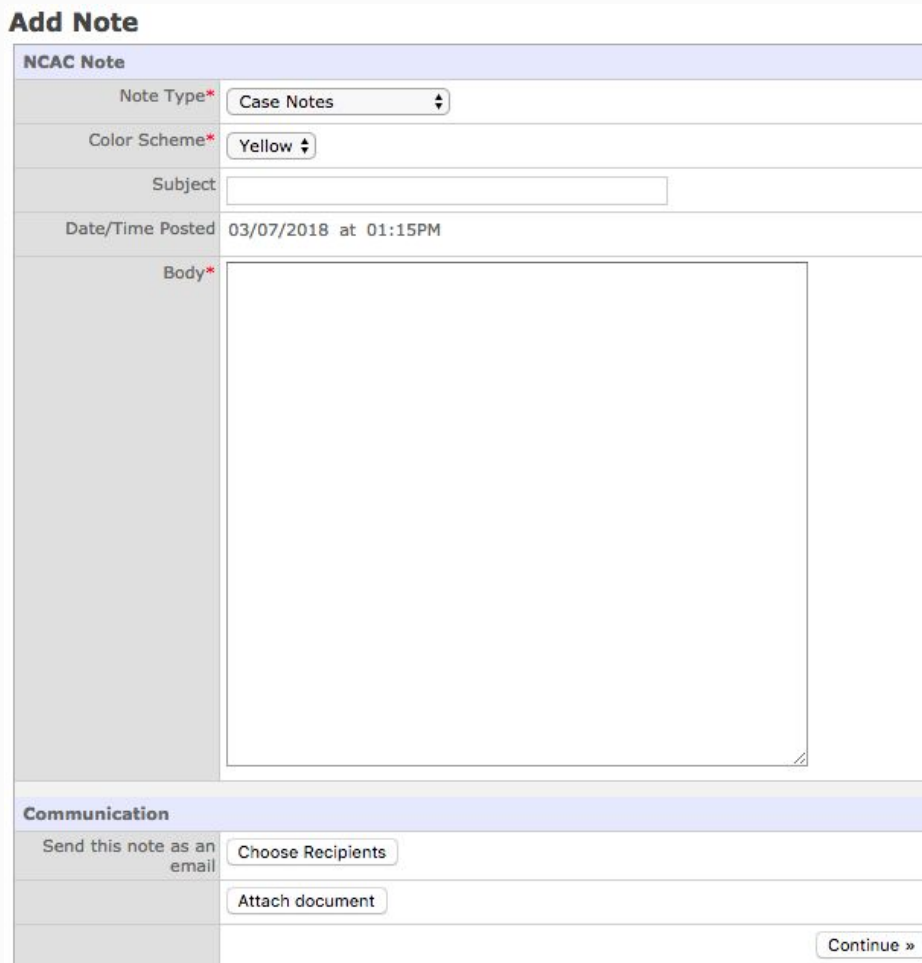
Select the Choose File button and a file selector will be opened. Once you have selected the file you want uploaded, you can either click on Continue, or (if you are adding multiple documents) you can upload another file by selecting Upload and Add Another. Once you are finished uploading all of your documents, click on Continue to be taken back to the Client Profile page.

At the bottom of the Client Profile page, select the Documents tab to see the list of all Documents that have been uploaded for this client.

The screenshot shows a web interface with two tabs: 'Case Notes' and 'Documents'. The 'Documents' tab is active. Below the tabs, there is a folder icon and the text 'Client, New (18-0001198)'. Inside this folder, there is a document icon and the text 'Untitled document.pdf'. To the right of the document, the text 'Test Document (Brief)' is displayed. Further to the right, there are three blue links: 'Add Subfolder', 'Download', and 'Delete'.

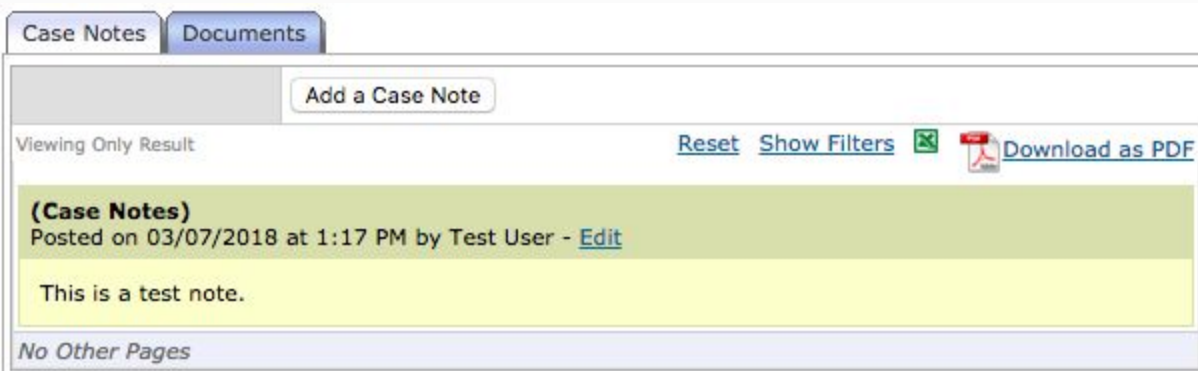
Case Notes

Look back at the right side Actions box and select the Add Case Note link. Like Documents, Note functionality is available in many places throughout the application. You have the ability to email a note to someone through the Communications section. You can also attach a document to a Note if the document should be specifically referenced in the note.



The screenshot shows the 'Add Note' form. At the top, it is titled 'Add Note' and 'NCAC Note'. The form has several fields: 'Note Type*' is a dropdown menu set to 'Case Notes'; 'Color Scheme*' is a dropdown menu set to 'Yellow'; 'Subject' is an empty text input field; 'Date/Time Posted' is '03/07/2018 at 01:15PM'; 'Body*' is a large empty text area. Below the form, there is a 'Communication' section with 'Send this note as an email' and 'Choose Recipients' buttons, and an 'Attach document' button. A 'Continue »' button is at the bottom right.

After filling out the note information, select the Continue button to be forwarded back to the Client Profile page. The Case Notes tab at the bottom of the Client Profile page will display any added Case Notes.

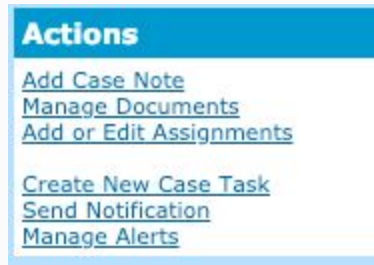


The screenshot shows the Client Profile page with two tabs: 'Case Notes' and 'Documents'. The 'Case Notes' tab is active. At the top of the tab, there is an 'Add a Case Note' button. Below the button, it says 'Viewing Only Result' and has links for 'Reset', 'Show Filters', and 'Download as PDF'. The main content area shows a single case note: '(Case Notes) Posted on 03/07/2018 at 1:17 PM by Test User - Edit'. The note body contains the text 'This is a test note.' At the bottom, it says 'No Other Pages'.



Case Assignments

Case Assignments allow you to assign a Case to one or multiple staff member(s), allowing the Case to display on the assigned Staff's Home Page in the Case Assignment listview.


To add a Case Assignment, select Add or Edit Assignments from the right side Actions box on the Client Profile page.




You are able to select the Assignment Type (e.g. Service Provider), the Contact to whom you wish to assign the case (via the Contact field), add any pertinent notes, as well as the start and end date of the Assignment. If you are adding a single Staff member to an Assignment, select Save and Return to Case. If you would like to add multiple Staff members to an Assignment, select Save and Add Another Assignment.

Assignment	
Assignment Type*	Please Select ▾
Contact* Search for contacts by name	<input type="text"/>
Assignment Note	<input type="text"/>
Assignment Start	02/07/2019 
Assignment End	mm/dd/yyyy 
Copy Assignment to Associated Cases By selecting associated cases below, this assignment will be copied to each selected case. If there is already an active assignment of the same assignment type, no action will be taken.	
Copy Assignment to Associated Cases	<input type="checkbox"/> Alleged Offender: Test Neighbor - Neighbor
<input type="button" value="Save and Return to Case"/> <input type="button" value="Save and Add Another Assignment »"/>	

The Case Assignments will be listed on the Case Assignments tab on the Home page, as well as on the Client's Profile page under the Assignments tab.

Case Assignments					
Viewing Only Result					Reset Show Filters 
ID #	Name	Case Type	Intake Date	Case Status	Assignments
18-0001198	New Client	Client	02/23/2018	Open	Test User (Service Provider) end 02/27/2018
No Other Pages					

Services Assignments Task List Alerts Related Cases					
Viewing Only Result					Reset Show Filters 
Contact	Assignment Type	Assignment Start	Assignment End	Assigned By	Action
Test User	Service Provider	02/26/2018	02/27/2018	Test User	Edit Delete
No Other Pages					

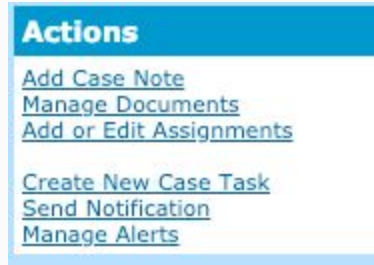
Assignment Enhancements Guide

An in-depth Case Assignments guide is available upon request. Please reach out to cacdev@networkninja.com or your Admin to receive a copy of it.

Alerts

Alerts allow you to place a colored Alert above the Client's name. This alert displays anytime the Client is selected. This is a great way to notify others of information such as a latex allergy, a violent tendency, words not to use, etc.

To add an alert to a Client's Profile select Manage Alerts in the right side Actions box,



Adding an Alert Title is optional, however the Alert Message and Color Scheme are required. Alert Titles will appear in bold at the top of Client pages, along with the Alert Message. The Alert start date/time defaults to the current date/time, but you can also choose when the Alert will start and end displaying on the Client Profile. When you have entered the desired alert information, select Continue.

Add Alert Update

Alert Details	
Information	Created By: Test User Created On: 03/07/2018 at 3:23 PM Created For: New Client
Alert Title	<input type="text"/>
Alert Message*	<input type="text"/>
Color Scheme*	Please Select ▾
Start Time	03/07/2018 at 03:23 PM ▾
End Time	mm/dd/yyyy at : AM ▾
Active	<input checked="" type="radio"/> Yes <input type="radio"/> No
Continue »	

Once the Alert is active, it will be displayed above the Client's name. You can manage the Alert at any time by selecting it from the Alerts listview on the Client's Profile page.

✓ Saved

Client Allergy
Client has a latex allergy

New Person

Referral Information, Client Details | Allegations/Reported Abuse

Family Members, Custody | MDIT, Client History | Behavior Changes, Mental Health

Insurance, Medical Information | Associated Relationships

Referral Information, Client Details

Intake Date	03/12/2019
Has this person been identified?	Yes

Client Profile

✓ Client Intake was completed on 03/12/2019 at 3:28 PM by Test User 1.
[Edit Intake]

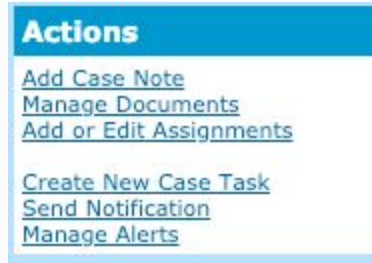
View Intake Summary

Save Intake Summary

Tasks

Tasks allow you to assign a Task to yourself, or other Staff members, and have the Task displayed on the My Tasks Home Page listview. You can use Tasks in many different ways; following up with a Client, reviewing a Case, prepare for an FI, etc.

From the right side Actions box, select “Create New Case Task”



At a minimum, you must enter the Title, and select at least one User, though you can add multiple Users who the Task will be assigned to. The List Date defaults to today’s date (the date the Task will display in the User’s My Task list view on the Home Page), but if a Task isn’t due for a few weeks, you can choose the date you’d like it to display.

Create New Case Task

Task Information	
Title*	Case Task
Task Type	Case Task
Description	Test text
Users*	Test User [Remove]
Search for users by name or login	
Tasks show up on your to do list starting on their list date.	
List Date*	02/27/2018
Due Date	02/27/2018
Send Email Notification?	<input type="checkbox"/>
Create Case Task Create & Add New Case Task »	

In addition to being displayed on the My Tasks Home Page listview for the Staff that have been assigned a Task, all Tasks are listed on the Client’s Profile page under the Tasks tab, where they can also be modified.

Contacts

To view all contacts that have been entered into the system and to add new contacts, go to the Contacts tab.

The screenshot shows the Collaborate software interface. At the top, there is a navigation bar with tabs for Home, Cases, Calendar, Case Reviews, Documents, Contacts, Organizations, Reports, and Staff and Sites. Below the navigation bar is a search bar and a toolbar with options like Send Message, Preferences, and Hide Taskbar. The main content area shows a table with columns for Name, Email, Contact Type, Organization, and Contact Active. The table currently displays 'No Results'. To the right of the table is an 'Options' box with links for 'Contact List' and 'Create New Contact'.

All users that are entered into the system also have a contact record created for them. To view/edit any of the contacts, select the contact name to be forwarded to the contact profile page. This functionality works just like any other profile page. To add a new contact, click on the Create New Contact link in the Options box on the right side of the screen. It is very important to always search before creating a new contact to avoid duplicate records.

Contacts cannot be deleted from Collaborate. The reason for this is because contacts are used throughout the application in multiple areas, such as intakes and services. If a contact was deleted, it would then be deleted from any form that it was used in. Instead, you can disable a contact so it will no longer appear when searching in the application. The disabled contact will still appear in any forms that it has already been added to, and it will also still be available for reporting purposes.

Users are also accessed via this tab. Keep in mind that only some roles will have access to Users.

Organizations

To view all organizations that have been entered into the system and to add new ones, go to the Organizations tab.

collaborate

Support Request | Support Tickets | Test User 1: Logout

Home Cases Calendar Case Reviews Documents Contacts Organizations Reports Staff and Sites

Home » Organizations Search | Send Message | Preferences | Hide Taskbar

Organizations

Viewing Only Result [Reset](#) [Hide A to Z](#) [Hide Filters](#)

0 1 2 3 4 5 6 7 8 9 A B C D E F G H I J K L M N O P Q R S T U V W X Y Z

Organizational Type(s)
Comparison: Any Law Enforcement School **Active**: Yes

Organization Name:
Address: Zip City State: --

[Filter](#)

Organization Name	Phone Number(s)	Address	Website Address	Organizational Type(s)
Network Ninja Inc.	N/A	N/A	N/A	N/A

No Other Pages

Options
[Organization List](#)
[Add New Organization](#)

To view/edit any of the organizations, select the organization name to be forwarded to the profile page. This functionality works just like any other profile page. To add a new organization, click on the Add New Organization link in the Options box on the right side of the screen. It is very important to always search before creating a new organization to avoid duplicate records.

Organizations cannot be deleted from Collaborate. The reason for this is because organizations are used throughout the application in multiple areas, such as intakes and services. If an organization were to be deleted, it would then be deleted from any form that it was used in. Instead, you can disable an organization so it will no longer appear when searching in the application. The disabled organization will still appear in any forms that it has already been added to, and it will also still be available for reporting purposes.

Calendar

The calendar tab can be very helpful for organizing events, setting deadlines or creating appointments. The home page can show your schedule by the day, week, month or just list upcoming events.

For this walkthrough we will create a new event. Click on the New Event link located in the options box to the right side of the screen. This will take you to the Event Details page.

The event Type, located beneath the Location Details text box in the first section, color codes your calendar. For this walkthrough, select General under the Type dropdown menu. Then, fill out the necessary requirements for the form, and scroll to the bottom of the page. Then click on either Save and Return to Calendar, or Save and View Event.

Your event will appear in your calendar as pictured below. You can also change the color coding scheme of your calendar with the Color Key box on the right side of the page.

Day Week Month **Event List**

Filter Custom Show Apply Filter »

« 02/27/2018 February 28, 2018 (Wednesday) 03/01/2018 »

8:00	
8:30	
9:00	
9:30	
10:00	Test Event 10:00 am - 12:00 pm
10:30	
11:00	
11:30	
12:00	

Go to Date

Date: 02/28/2018 Go »

Options

[New Appointment Slot](#)
[New Deadline](#)
[New Event](#)
[New Task](#)
[View Your Task List](#)
[View Calendar in Full Screen](#)

Color Key

Color events by: Event Type

- General
- Meeting
- Service
- No type

To edit or update an existing event, click on the event name to be taken to the Event Details page. Then, click on the Edit this Event link in the Event Options box on the right side of the page.

Event Details	
Title	Test Event
Location Details	N/A
Type	General
Private Event	No
Broadcast events will show up in everyone's calendar.	
Broadcast Event	No
Scheduled By	Test User
Attendees	Test User
Date/Time	
All Day Event	No
Start Date/Time	02/28/2018 at 10:00 AM
End Date/Time*	02/28/2018 at 12:00 PM

Go to Date

Date: 02/28/2018 Go »

Options

[New Appointment Slot](#)
[New Deadline](#)
[New Event](#)
[New Task](#)
[View Your Task List](#)
[View Calendar in Full Screen](#)

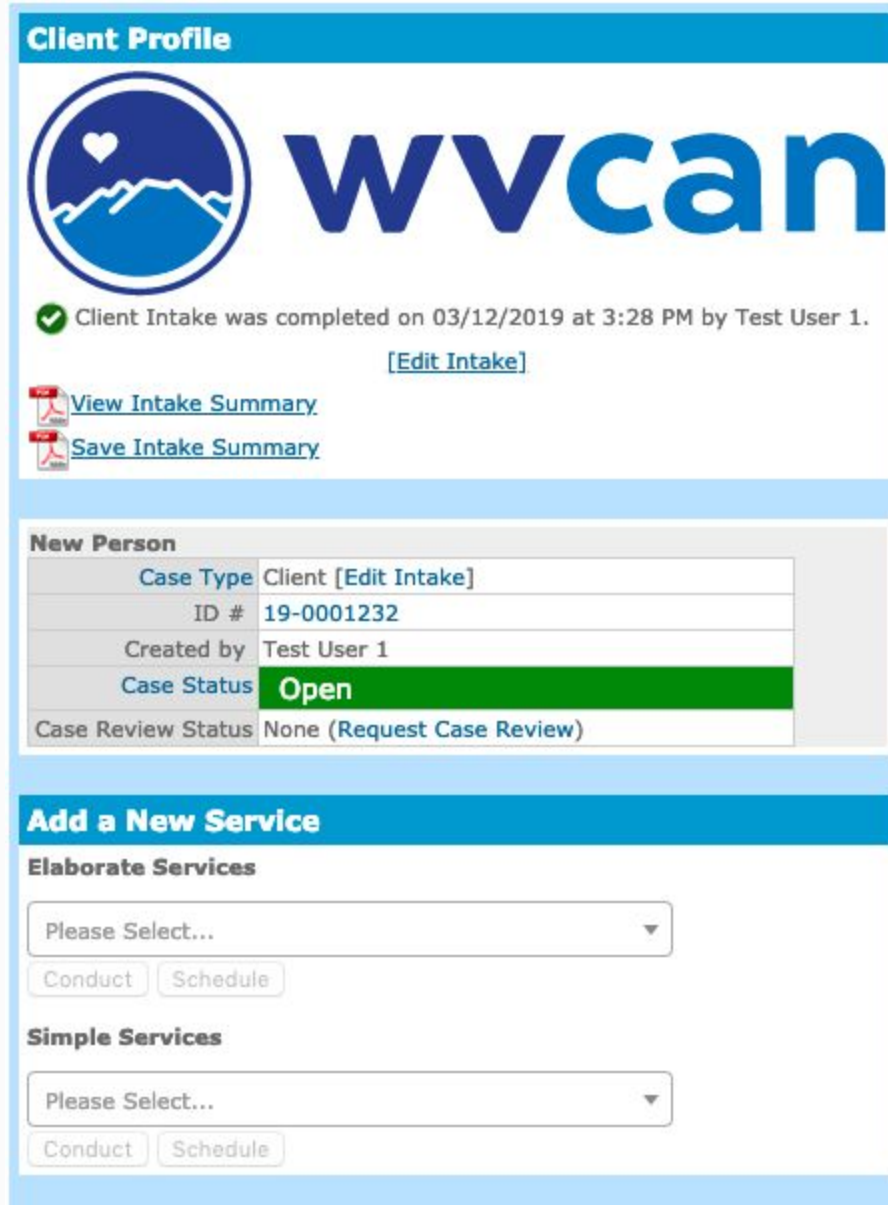
Event Options

Event Profile
[Edit this Event](#)
[Add Note](#)
[Add Task for this event](#)
[Delete this Event](#)
[Add new document](#)
[Documents](#)


You will then be able to make any desired changes or updates to the currently existing event. When finished, scroll to the bottom of the page and click on either Save and Return to Calendar, or Save and View Event.

Client Services



Now we will discuss Client Services and how to create them. Client Services are located on the Client Profile page. New services can be added via the Add a New Service box on the right side of the page.



Client Profile

 **wvcan**

✓ Client Intake was completed on 03/12/2019 at 3:28 PM by Test User 1.
[\[Edit Intake\]](#)

 [View Intake Summary](#)
 [Save Intake Summary](#)

New Person

Case Type	Client [Edit Intake]
ID #	19-0001232
Created by	Test User 1
Case Status	Open
Case Review Status	None (Request Case Review)

Add a New Service

Elaborate Services

Please Select... ▼

[Conduct](#) [Schedule](#)

Simple Services

Please Select... ▼

[Conduct](#) [Schedule](#)

Notice there are two buttons below the service type drop down, Conduct and Schedule. Conduct will take you directly to the service form to begin filling out that service. Schedule will take you to a form to enter appointment details so you can schedule a future service on the calendar.

There are two categories of services: Elaborate Services, and Simple Services.

Elaborate services are specialized services containing fields unique to that specific service (e.g. Criterion B (Intrusion) question in the “UCLA PTSD Index” service).

Criterion B (Intrusion)	<input type="checkbox"/> 10. Recurrent, distressing dreams related to trauma <input type="checkbox"/> 11. Psychological reactivity <input type="checkbox"/> 14. Physiological reactivity <input type="checkbox"/> 18. Recurrent, intrusive thoughts of trauma <input type="checkbox"/> 5. Dissociative reactions (flashbacks) client feels trauma is recurring
-------------------------	--

Simple services include the same fields, regardless of “Service Type,” program, or name. See Examples below:

Create Home Visit

Service Provider (Contact) Search for contacts by name, can add multiple	Test User 1 Email: bmulvihill@networkninja.com Organization: Network Ninja Inc. Edit Contact <input type="text" value="[Remove]"/>
Date of Service	03/12/2019
Start Time	<input type="text"/> : <input type="text"/> AM <input type="button" value="Now"/>
End Time	<input type="text"/> : <input type="text"/> AM <input type="button" value="Now"/>
Time Spent HH:MM	0
Service Location Search for Organizations by name	Randolph-Tucker CAC N/A [Remove]
Appointment Status	Please Select ▾
Additional Attendees Select one or more type then specify the other attendees	<input type="checkbox"/> Contact <input type="checkbox"/> Associated Person <input type="checkbox"/> Organization <input type="checkbox"/> Other
Service Options	<input type="button" value="Save and View Home Visit"/> <input type="button" value="Save and Return to Case »"/> <input type="button" value="Add a Service Note"/>

Create Follow-up

Service Provider (Contact) Search for contacts by name, can add multiple	Test User 1 Email: bmulvihill@networkninja.com Organization: Network Ninja Inc. Edit Contact <input type="text" value="[Remove]"/>
Date of Service	03/12/2019
Start Time	<input type="text"/> : <input type="text"/> AM <input type="button" value="Now"/>
End Time	<input type="text"/> : <input type="text"/> AM <input type="button" value="Now"/>
Time Spent HH:MM	0
Service Location Search for Organizations by name	Randolph-Tucker CAC N/A [Remove]
Appointment Status	Please Select ▾
Additional Attendees Select one or more type then specify the other attendees	<input type="checkbox"/> Contact <input type="checkbox"/> Associated Person <input type="checkbox"/> Organization <input type="checkbox"/> Other
Service Options	<input type="button" value="Save and View Follow-up"/> <input type="button" value="Save and Return to Case »"/> <input type="button" value="Add a Service Note"/>

Both Elaborate and Simple Services contain Date, Time, and Service Provider information. For this guide, we will schedule and conduct an example Elaborate Service.

Scheduling Services

To Schedule a service that will be performed at a later time/date, select the desired service from the dropdown menu, and then click “Schedule.” You will then be taken to the Appointment Creation page.

Add a New Service

Elaborate Services

▼
ACE - Adverse Childhood Experiences

Conduct
Schedule

Create ACE - Adverse Childhood Experiences Appointment

ACE - Adverse Childhood Experiences Appointment

Title*	ACE - Adverse Childhood Experiences
Service Location <small>Search for Organizations by name</small>	Randolph-Tucker CAC N/A [Remove]
Location Details	<input type="text"/>
Event Invitees* <small>Search for users by name or login</small>	Test User 1 [Remove]
Date/Time	
Date of Service*	03/12/2019
Start Time *	<input type="text"/> : <input type="text"/> AM <input type="button" value="Now"/>
End Time *	<input type="text"/> : <input type="text"/> AM <input type="button" value="Now"/>
Time Spent <small>HH:MM</small>	0 <input type="text"/>
Appointment Status	Scheduled <input type="button" value="↓"/>
Reminder	
Send Reminder?	<input type="radio"/> Yes <input checked="" type="radio"/> No
Scheduled By	Test User 1
<input type="button" value="Save"/>	
Service Options	<input type="button" value="Add a Service Note"/>

After filling out the appropriate information, click “Save.” This appointment will now appear on your Calendar, as well as on the Client Profile.

Services	Assignments	Task List	Alerts	Related Cases
Viewing Only Result Reset Show Filters 				
Date of Service	Service Type	Service Location	Provider	Appointment Status
03/11/2019	ACE - Adverse Childhood Experiences	Randolph-Tucker CAC	N/A	Scheduled
No Other Pages				

Conducting Services

When you are ready to Conduct the scheduled Service, select the service in the Services listview on the Client Profile page to be taken to the Appointment page. From the Appointment page, click on “Edit [Service Name]” on the right hand side in the Actions box.

ACE - Adverse Childhood Experiences Appointment

ACE - Adverse Childhood Experiences Appointment	
Title	ACE - Adverse Childhood Experiences
Service Location	Randolph-Tucker CAC Edit Organization
Location Details	test location details
Event Invitees	Test User 1
Date/Time	
Date	03/11/2019
Start Time	10:00 am
End Time	11:00 am
Time Spent	1:00
Appointment Status	Scheduled
Reminders	
Scheduled By	Test User 1
<div style="display: flex; justify-content: space-between; border-bottom: 1px solid #ccc; padding-bottom: 5px;"> Notes Documents Task List Service Log </div> <div style="border: 1px solid #ccc; padding: 5px; margin-top: 5px;"> <div style="border-bottom: 1px solid #ccc; padding-bottom: 5px;"> <input type="text" value="Add a ACE - Adverse Childhood Experiences Note"/> </div> <div style="text-align: right; padding-bottom: 5px;"> Reset Show Filters Download as PDF </div> <div style="padding: 5px 0 0 0;"> <p>No Results</p> </div> </div>	

New Person

Case Type	Client [Edit Intake]
ID #	19-0001232
Created by	Test User 1
Case Status	Open
Case Review Status	None (Request Case Review)

Complete this Service

This service allows locking to prevent any further changes. When finished with all editing, please follow the link below.

[Complete and Lock this Service](#)

Note: You will be prompted to provide your current password before the system will lock this service.

Actions

- [ACE - Adverse Childhood Experiences Overview](#)
- [Edit ACE - Adverse Childhood Experiences](#)
- [Add or Edit Assignments](#)
- [Edit Appointment](#)
- [Manage Documents](#)
- [Add a Service Note](#)
- [Create Service Task](#)
- [Download as PDF](#)
- [Delete this Service](#)
- [Return to Case Profile](#)

Alternatively, if you are conducting a service immediately, you can select the desired service from the Dropdown and click on “Conduct.”

Add a New Service



Elaborate Services

ACE - Adverse Childhood Experiences
▼

Conduct
Schedule

Service Fields

Edit ACE - Adverse Childhood Experiences

Service Provider (Contact) Search for contacts by name, can add multiple	Test User 1 Email: bmulvihill@networkninja.com Organization: Network Ninja Inc. Edit Contact [Remove] <input type="text"/>
Date of Service	03/11/2019 
Start Time	10 : 00 AM <input type="button" value="Now"/>
End Time	11 : 00 AM <input type="button" value="Now"/>
Time Spent  HH:MM	1:00
Service Location Search for Organizations by name	Randolph-Tucker CAC N/A [Remove] <input type="text"/>

Every service form will have different fields with different functionality. However, they all share the same set of core fields, which are the following:

- **Service Provider** - This is the user or contact performing the service. This value defaults to the current user, but may be changed, and many contacts can be added.
- **Date of Service** - This is the date that the service is performed. The system will default to today's date, but this can be changed to a date in the past or future.
- **Start Time** - This is the time the service begins. This start time is used for calculating the duration of time spent on the service.
- **End Time** - This is the time the service ends. This end time is used for calculating the duration of time spent on the service.
- **Time Spent** - This is an auto-calculated field that will display the duration of time based on start time and end time entered.
- **Service Location** - This is the location, or organization, at which a service is performed.

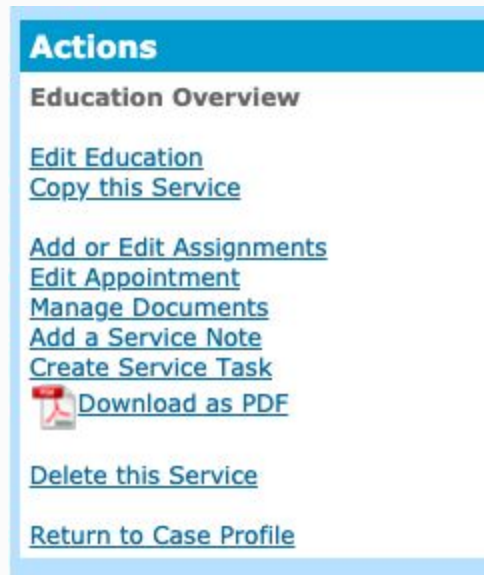
After you have filled out the core fields, you can proceed to fill out the rest of the questionnaire. Once the questionnaire has been filled out, you can click on "Save and View [Service Name]".

Filling out the questionnaire and clicking Save and View [Service Name] will bring you to the service summary page, where you can see the read-only view/summary of the completed service. Notice there is an Actions box on the right side of the screen. The Actions box will allow you to do various things to services (e.g. Edit, Download).

ACE - Adverse Childhood Experiences

Date of Service	03/11/2019
Service Provider (Contact)	Test User 1 Email: bmulvihill@networkninja.com Organization: Network Ninja Inc. Edit Contact
Start Time	10:00 AM
End Time	11:00 AM
Time Spent	1:00
Service Location	Randolph-Tucker CAC Edit Organization
Appointment Status	Attended
ACE Total Score	10

Service Actions



- **Edit [Service Name]** - Allows you to go back into edit mode for that service
- **Copy this Service**- Allows you to copy the service to other cases in Collaborate
- **Add or Edit Assignments** - Allows you to create assignments specifically for this service
- **Edit/Create Appointment** - Redirects you to the Edit / Schedule “Service” Appointment screen for this service
- **Manage Documents** - As with the client profile, you can upload a document and add it to a service. This functionality is exactly the same on a service as it is on a case.
- **Add a Service Note** - Allows you to add notes regarding the service to the service itself
- **Create Service Task** - Allows you to create tasks specifically for this service
- **Download as PDF** - All services can be downloaded as a PDF for easy printing
- **Delete this Service** - Allows you to delete a service (pending permissions granted by your administrator)
- **Return to Case Profile** - Allows you to return to the client profile associated with the service that was just conducted

Service Locking

Some services have the option of being locked. Locking services prevents any further changes from being made to the service. **Once a service is locked, it cannot be unlocked.**

Complete this Service

This service allows locking to prevent any further changes. When finished with all editing, please follow the link below.

[Complete and Lock this Service](#)

Note: You will be prompted to provide your current password before the system will lock this service.

Batch Simple Services

Batch Simple Services allow you to add multiple Simple Services to a Case, without having to enter each Service individually. To perform a Batch Simple Service, click on the Batch Simple Service link on the right hand side in the Add a New Service box.

Add a New Service

Elaborate Services

Please Select...

Conduct Schedule

Simple Services

Please Select...

Conduct Schedule

[Quick Batch Simple Service](#)
[Batch Simple Service](#)

This will take you to the “Create Simple Service Batch” page.

Create Simple Service Batch

Simple Service Default Values	
Program	<input type="text" value="Please select..."/>
Date of Service	<input type="text" value="02/07/2019"/>
Start Time	<input type="text"/> : <input type="text"/> AM <input type="button" value="Now"/>
End Time	<input type="text"/> : <input type="text"/> AM <input type="button" value="Now"/>
Time Spent <small>HH:MM</small>	<input type="text" value="0"/>
Service Location <small>Search for Organizations by name</small>	<input type="text"/>
Service Provider <small>(Contact) Search for contacts by name, can add multiple</small>	<div style="border: 1px solid #ccc; padding: 2px;"> Test User 2 Email: bmulvihill@networkninja.com Edit Contact </div> <input type="button" value="[Remove]"/> <input type="text"/>

Test Client	
Case Type	Client [Edit Intake]
ID #	18-0001146
Program History	None
Created by	Steve Cornelison
Case Status	Open

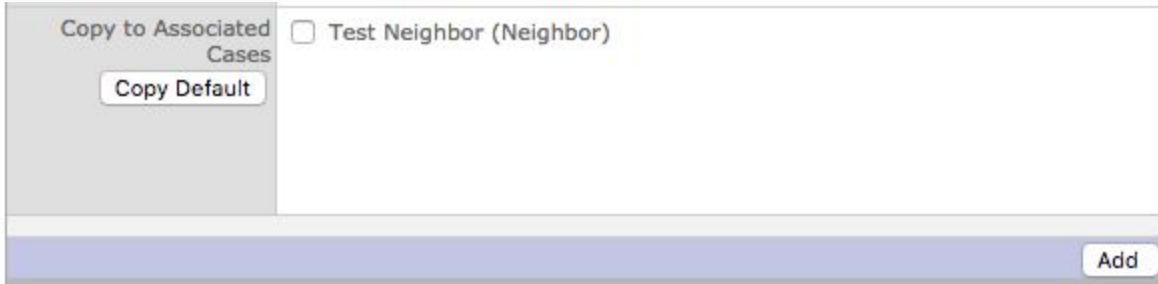
The top part of the Simple Service Batch form contains default information, which can be copied to the various Simple Services you add during the batch process.

Create Simple Service Batch

Simple Service Default Values	
Program	Please select... ▾
Date of Service	02/07/2019 📅
Start Time	: AM ▾ Now
End Time	: AM ▾ Now
Time Spent ⚙️ HH:MM	0
Service Location Search for Organizations by name	<input type="text"/> 🔍
Service Provider (Contact) Search for contacts by name, can add multiple	<div style="border: 1px solid #ccc; padding: 2px;"> Test User 2 Email: bmulvihill@networkninja.com Edit Contact </div> <input type="text"/> 🔍
Additional Attendees Select one or more type then specify the other attendees	<input type="checkbox"/> Contact <input type="checkbox"/> Associated Person <input type="checkbox"/> Organization <input type="checkbox"/> Other
Copy to Associated Cases	<input type="checkbox"/> Test Neighbor (Neighbor) (Alleged Offender)
Batch Simple Service Creation	
	<input type="button" value="Remove"/>
Service Type*	Please Select... ▾
	<input type="button" value="Copy All Default Values"/>
Program <input type="button" value="Copy Default"/>	Please select... ▾
Date of Service <input type="button" value="Copy Default"/>	mm/dd/yyyy 📅

Once the default information has been entered, select the desired Service Type via the dropdown menu under Service Type. You can now select Copy all Default Values to this Service (and adjust any fields as needed), or, you can select individual fields you would like to copy by selecting the appropriate Copy Default button for each field you would like copied over.

Additional Simple Services can be added by selecting the Add button in the bottom right corner.



Copy to Associated Cases

Test Neighbor (Neighbor)

Copy Default

Add

Once the desired Simple Services have been added, select Process Simple Service Batch, and the Simple Services will be applied to the Client.



Copy to Associated Cases

Test Neighbor (Neighbor)

Copy Default



Add

Process Simple Service Batch

Quick Simple Service Batch

An even faster way to create a batch of Simple Services is to click on the Quick Batch Simple Service link in the Add a New Service box. This will take you to the “Create Quick Simple Service Batch” page. Where the batch of simple services can be created all on one page.

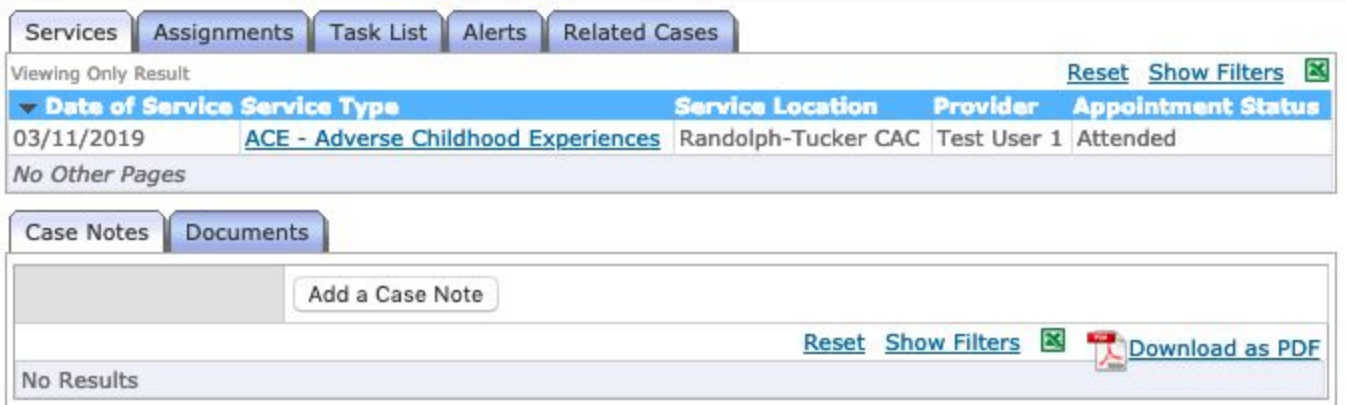
Create Quick Simple Service Batch

Simple Service Default Values	
Date of Service	03/16/2018 
Start Time	<input type="text"/> : <input type="text"/> AM <input type="button" value="Now"/>
End Time	<input type="text"/> : <input type="text"/> AM <input type="button" value="Now"/>
Time Spent  HH:MM	0
Service Location Search for Organizations by name	<input type="text"/>
Service Provider (Contact) Search for contacts by name, can add multiple	Test User [Remove] <input type="text"/>
Additional Attendees Select one or more type then specify the other attendees	<input type="checkbox"/> Contact <input type="checkbox"/> Associated Person <input type="checkbox"/> Organization <input type="checkbox"/> Other
Copy to Associated Cases	<input type="checkbox"/> Test Neighbor (Neighbor)
Case Note	
	<input type="button" value="Add a Case Note"/>
Batch Simple Service Creation	
Simple Service Types* After you click in the selection box, you can start typing to filter results	<div style="border: 1px solid black; padding: 5px;"><div style="background-color: #ccc; padding: 2px; display: inline-block;">x Medical Progress Med</div></div> <div style="background-color: #007bff; color: white; padding: 2px; display: inline-block; margin-top: 5px;">Medical Progress</div>
	<input type="button" value="Process Simple Service Batch"/>

Notice that the Simple Service Types box functions as a Search box. Start by typing in the first few letters of the service you are looking to create, and a list of options will generate. Once you have found the desired service, click on it, and it will be listed in the box. If you do not know the name of the service you are looking for, clicking in the box will display the full list of Simple Services to choose from.

Services Listview

Added Services are displayed in the Services tab of the listview at the bottom of the client profile above the Case Notes and Documents listviews.



The screenshot shows a web interface with a top navigation bar containing tabs: Services, Assignments, Task List, Alerts, and Related Cases. The 'Services' tab is active. Below the tabs, there is a 'Viewing Only Result' section with a table. The table has columns: Date of Service, Service Type, Service Location, Provider, and Appointment Status. A single row is displayed with the following data: 03/11/2019, ACE - Adverse Childhood Experiences, Randolph-Tucker CAC, Test User 1, and Attended. Below the table, there is a 'No Other Pages' message. Below the table, there is a 'Case Notes' and 'Documents' section. The 'Documents' tab is active. Below the tabs, there is a 'Add a Case Note' button. Below the button, there is a 'No Results' message. At the bottom right of the 'Documents' section, there are links for 'Reset', 'Show Filters', and 'Download as PDF'.

Date of Service	Service Type	Service Location	Provider	Appointment Status
03/11/2019	ACE - Adverse Childhood Experiences	Randolph-Tucker CAC	Test User 1	Attended

This concludes the Collaborate Training Guide.