



Module 9: tcm 7 update session

10.00am – 4.00pm

Sydney venue

Suite 2, Level 3, 201 Miller Street, North Sydney NSW 2060
Telephone: (02) 8877 0351 (Reception)

Melbourne venue:

Level 5, 355 Spencer Street, West Melbourne
Victoria 3003
Telephone: (03) 9320 9000 (reception)

Objectives of workshop

This session is designed for experienced users of The Care Manager version 6.11.x or prior. The session will endeavour to cover all of the changes in from version 6.11.x to tcm 7. While not possible to cover all changes in depth, the emphasis will be on those changes affecting the major parts of the software, as well as those identified by the participants on the day. The structure and sequence of this outline is based on the order given in the Global menu bar at the top of the tcm 7 screen.

Introductions

- Trainer intro
- Venue details, tea/coffee, lunch details
- Participants to introduce themselves

Welcome to tcm 7

- New features!
- New Switchboards!
- Some new procedures!

Part One: A tour via the Global menu

1. Global menu > Home

Client Switchboard

- Search for clients (same as previously)
- Programs Search pane

Task Bar buttons

- Refresh >>**New**
- Preview >>**New**
- Views >>**New**
- Details (previously called Info)
- Add New Client Episode >>**New** procedure required when adding a new client Episode
- New Event: No major changes in the way that Client Events are created.
- View Event: same as 6.11.x
- History: same as in previous versions i.e. select a client then click History button
- Programs: same procedures as in previous versions, i.e. highlight a client at the Client Switchboard then click the Programs button
- Contacts: works in a similar way to previous versions

- Scheduled Events (for one selected client). Previously called To Do list.

Note: By default, tcm 7's Client Switchboard only displays the client's most recent Episode. This is the reverse of the 6.11.x default.

Discontinued buttons

- New Episode (new procedure required)
- Workflow
- Advanced Search

Changed button

- Find Now is now called Search

Events >>New

Enables a global view of client events over any date range.

Programs

No significant changes in functionality and procedures. However note the change in viewing Program Histories. When at a specific Program History screen, it is now no longer possible to remove the Program reference number to view other (or all) Program events. It is possible to filter and view selected Program Events when at the client's Episode History.

Groups

No significant changes functionality and procedures

Group Members

No significant changes

Client Contacts >>New

A new Switchboard to locate client contacts via name of contact or by name of client.

Reporting >>New

A new interface in tcm 7.

To be covered in depth in Part 2.

Common elements in all Switchboards

Navigation Pane

- Setting an "Open on Start up" default
- Hiding menu items you don't use

Search Pane

- Furling and unfurling the Search Pane

Results Pane

- How to customise (adding columns etc)
- Printing a list
- Saving multiple views

Task bar buttons

- Refresh
- Preview
- Views
- Details
- Add New

2. Global menu > Maintenance

Overview only

- Providers, Services, Workers
- Caregivers, Residential, Equipment
- Preferences, Surveys, Codes (previously called Lookup lists)
- Event Types, Auto Numbers, VINAH settings, Security
- Access Audit, Data page Sizes, System-wide settings, Contracts Rates

3. Global menu > Service Delivery

To be covered in more detail in Part 2

Calendar >>New

Shortcut to the Calendar

Service Instance Shifts

Used in Rostering

Scheduled Events >>New (previously called Diary Notes)

New name for To Do lists

Service Occurrences Switchboard

Displays Services Instances, Variations and Cancellations. Also used to allocate Purchase Invoices.

Cost Recoveries

New location of Cost Recovery Switchboard (previously at the Management screen)

Planned Service Delivery >>New name for Services screen

Displays the occurrence pattern (only) of planned service appointments (i.e. does not display individual service appointments). This screen also used to generate Service Instances. Note that there is currently no Daily Review screen.

Calendar Notes >>New

Enables the global viewing of Calendar Notes from all diaries and rosters

Scheduled Fee

Used in the Program module to charge a regularly occurring fee

Timesheets

Used in Rostering module

Fee Occurrence >>New

Linked to the generation of fees for the Scheduled Fee feature

4. e-Referrals

Previously located on lower menu.

5. Global menu > Finance

- Debtors
- Purchase Invoices >>New procedure
- Client Invoices

6. Global menu > Roster Toolkit

Previously a separately-launched program, Roster Toolkit has been integrated into tcm 7

- Client Conflicts, Worker Conflicts and Unallocated Shifts
- New procedures.

7. Global menu > Wizards

Overview only

Events Wizards

- Template Update (migrate templates to tcm 7)
- Document Migration (used to copy all documents to internal storage)
- Event Import
- Care Notes (creates Service Instances from audit time on Care Notes)
- Medication Import

Invoice/Finance Wizards

- Post Invoices
- Contract Price Update
- Bank Summary
- Direct Debit
- Transaction Export
- Service Expense Export
- Invoicing
- Invoice Export
- Payroll Export

Client management Wizards

- Change of Care Manager
- Client Merge

MDS Reporting Wizards

- QDC/CSTDA MDS
- HACCC MDS Reporting
- Compacts Reporting
- NRCP/MDS Reporting

VINAH Wizards

- VINAH Submission (Victoria only)
- VINAH Acknowledgement

Providers Wizards

- Provider De-Duplication

8. Global menu > View

Navigation pane

Toggles the navigation pane on/off at all screens

Preview pane

Toggle Preview pane on/off

Status pane

Toggle Status pane on/off

9. Global menu > Help

Global menu > Help > Contents

Opens online help files

Part Two: Processes and procedures

A hands-on exploration of the major parts of tcm 7

1. Add New Client Episode

- Exercise to add a new client to the database
- Exercise to add a Client Episode to the database

2. Creating and Viewing Client Events

No significant changes in tcm 7 with the exception of the new Events Switchboard

- At the Client, Program or Group Switchboard, select a client/group then select: New Event > Name of Event from the Task bar.
- Common Event header now in all events
- View Client Events via the View Event button via the respective Client, Program or Group History screens (as per 6.11.x).
- View all Events globally at the Events Switchboard
- Spell check, alerts, linking external docs, scheduling a future event (To Do) all work in same way as before.

3. Calendars

The three ways to access the Calendar

1. As per 6.11.x: select a Client, Program or Group then click the Diary button on the Task bar
2. Via the Global menu bar
3. Via the Calendar icon at bottom of Navigation pane

Date Navigation Pane

- Selecting a range of dates (1,2,3 days)
- Selecting a week at a time
- Selecting non-contiguous appointments (e.g. every Tuesday in September)
- Using in conjunction with the Task bar's Views feature (day, week, month etc)

Types of Diaries

- Client Diary (light-grey background)
- Program Diary (pinky fawn)
- Group Diary (Yellow)

For organisations who roster their own workers, there are additional new diaries:

- Client Roster
- Program Roster
- Group Roster
- Worker Roster

Open Calendar and adding to the Most Recently Used List >>New

- How to open a diary (opening a diary adds it to the Most Recent Used list)

Service colour backgrounds >>New

- Background colours indicates whether it is a Group, Client, Program Diary or Worker Roster

Service status colours >>New

- White: a recurring or one-off Planned Service
- Yellow: a Planned Variation, but not Cancelled
- Red: a Planned Variation that has been Cancelled
- Blue: a Service Instance (the appointment has Occurred)
- Green: a Service Instance (the appointment has been Confirmed)
- Grey: a Service Instance (the appointment has occurred, has been confirmed and exported)

Calendar Notes (previously called Diary Notes)

- Adding a calendar Note
- New Calendar Notes Switchboard

Other features

- Time Ruler
- Previous and Next appointments tabs

Adding a new service

- Procedure is similar to 6.11.x
- Changes in tcm 7

Varying a Service appointment

New feature when varying an appointment” Cost Recovery tab

4. Diary Task bar > Preview

Diary Task bar > Preview > Financial > Service Delivery Report; Average Service Plan Cost
Diary Task bar > Preview > Service Instances > Service Instances Report, Service Report and Client Weekly Schedule.

5. Diary Task bar > Service (and right-click)

Options available in Client, Program and Group Diaries

- Add New Planned Service
- Edit Planned Variation
- Edit Planned Service
- Edit Service Instance
- Cancel Occurrence
- Allocate Purchase Invoice
- Revise Service From
- Terminate Service From
- Delete Planned Service
- Copy Planned Service
- Show Planned Service Deliveries

6. Global menu > Planned Service Delivery Switchboard

- Exploring the Planned Service Delivery Switchboard

7. Global menu > Service Occurrences Switchboard

- Exploring the Service Occurrences Switchboard

8. Global menu > Reporting

- Running reports
- Report Templates **>>New**
- Reports that were not migrated from version 6.11.x

9. Purchase Invoices

- Overview of new procedure in reconciling purchase invoices.

Major and minor changes in tcm 7

- The Info button in version 6.11.x used to access a Client, Group or Program record is now labelled Details. Buttons previously called “Info” are now all called “Details”
- The Workflow button is not available in tcm 7. Workflow practices can now managed by the use of Consolidated Events.
- The New Episode button at the Client Switchboard in version 6.11.x is gone in tcm 7. Instead, new Episodes for clients are created using the Add New button.
- The Advanced Search button at the Client Switchboard is no longer available. Searching is now done via the Views, Context and Quick Filters buttons as well as the use of reports.
- Scheduled Events is the new name for the To Do list feature.
- By default, tcm 7’s Client Switchboard only shows the client’s most recent Episode. This is the reverse of what was the default in 6.11.x.
- The Edit Episode button, previously located on the bottom-left of a client History screen in version 6.11.x, has been removed in tcm 7. To edit a client’s Details record from the History screen, click the blue “i” button located on the far-right of the Client field at the top of the screen.
- The History menu located at the top-left of the History screen in versions 6.11.x has moved to the History task bar. The Episode Info has been replaced by the “i” button as explained above, and there is now no longer a Workflow screen. Printing a History listing is done from the Preview button on the Task Bar.
- The Event called External Document has been discontinued. All existing External Document Events in 6.11.x will be merged into the Attached Document Event during the migration of your organisation’s 6.11.x database to the tcm 7 format.
- Procedures used in the Purchase Invoice Reconciliation have changed.
- Roster Toolkit is now integrated into tcm 7. It is not launched as separate program.
- Group membership is not indicated on a client’s Episode Diary in tcm 7.
- The Weekly Schedule is not currently available in tcm 7’s Diary.
- Daily Review (previously located at the Services screen) was not migrated.

END

The Care Manager
Database Consultants Australia
Level 5, 355 Spencer Street, West Melbourne Victoria 3003
Telephone (03) 9320 9099 | Toll free: 1800 300 012 | Facsimile: (03) 9320 9001
tcmsupport@data.com.au | tcm7.com.au
Bulletin Board: <http://forum.thecaremanager.com.au>

22/09/2009 11:50 AM