R.E.A.C.H Patient Manager

User Manual

Table of Contents

Part 1: Introduction

What is R.E.A.C.H. PM?

R.E.A.C.H. Patient Manager is a data management program designed to handle the R.E.A.C.H. program's patient information. This is a custom application was developed in java using the netbeans IDE that is modularized to make it easy to expand. It uses a MYSQL server to store the information.

Features

1. Add and edit patients with a plethora of information fields
2. Archive patients that left the program
3. Add and Edit appointments between patients and staff members
4. View appointments on a monthly basis
5. Search appointments by staff member
6. Track Activities (group sessions) for patient and staff attendance
7. Search activities on a monthly basis
8. Add, edit, or remove Activity types
9. Generate a report based on a beginning and an end date

Part 2: System Requirements & Installation

System Requirements

1. Windows XP or Higher or Mac OS 10.6 (linux or other versions of windows or Mac are untested)
2. Java virtual machine
3. MySQL 5.0+ (other versions untested)

Installation

1. Unzip the contents of the distributed file to the directory of your choice.

1.1. Recommended directories (install to user directory for single user access)

1.1.1. Windows - C:\Program Files\REACH Patient Manager\

1.1.2. Mac OS - /Applications/REACH Patient Manager/

2. Check MYSQL server

2.1. User requires all privileges except DROP (required: ALTER, CREATE, DELETE, DROP, INDEX, INSERT, SELECT, UPDATE) for the schema that will be used

2.2. The schema must be created before the application can connect. This version of REACHPM will not create a schema automatically.

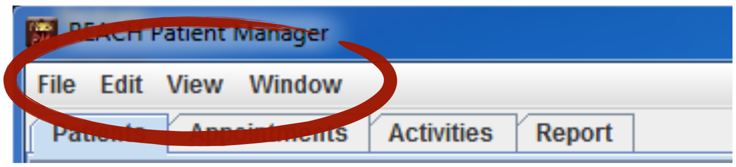
3. Double click on reachpm.jar and fill in the specified fields (Do not include “jdbc::” in the URL)

Part 3: Instructions

Layout

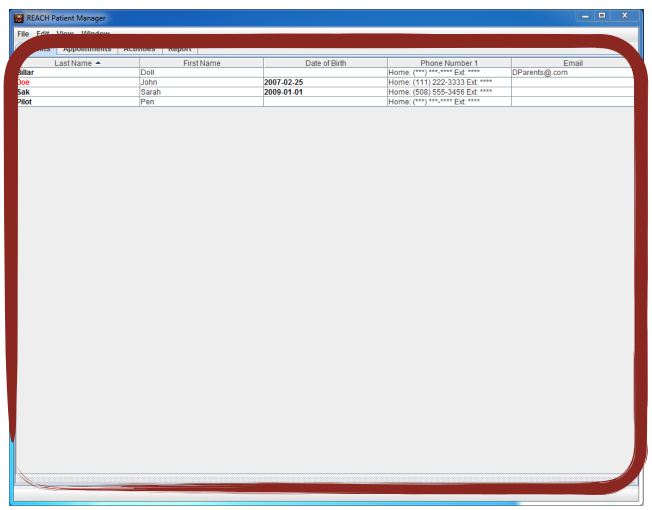
MenuBar

Contains actions that are not used often. There are some actions that are module specific, such as “add patient”.



Module Panel

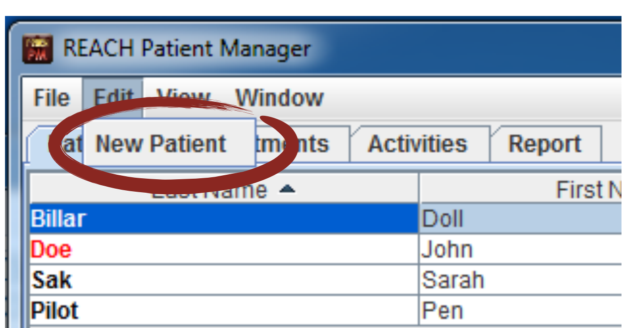
Contains all of the module windows



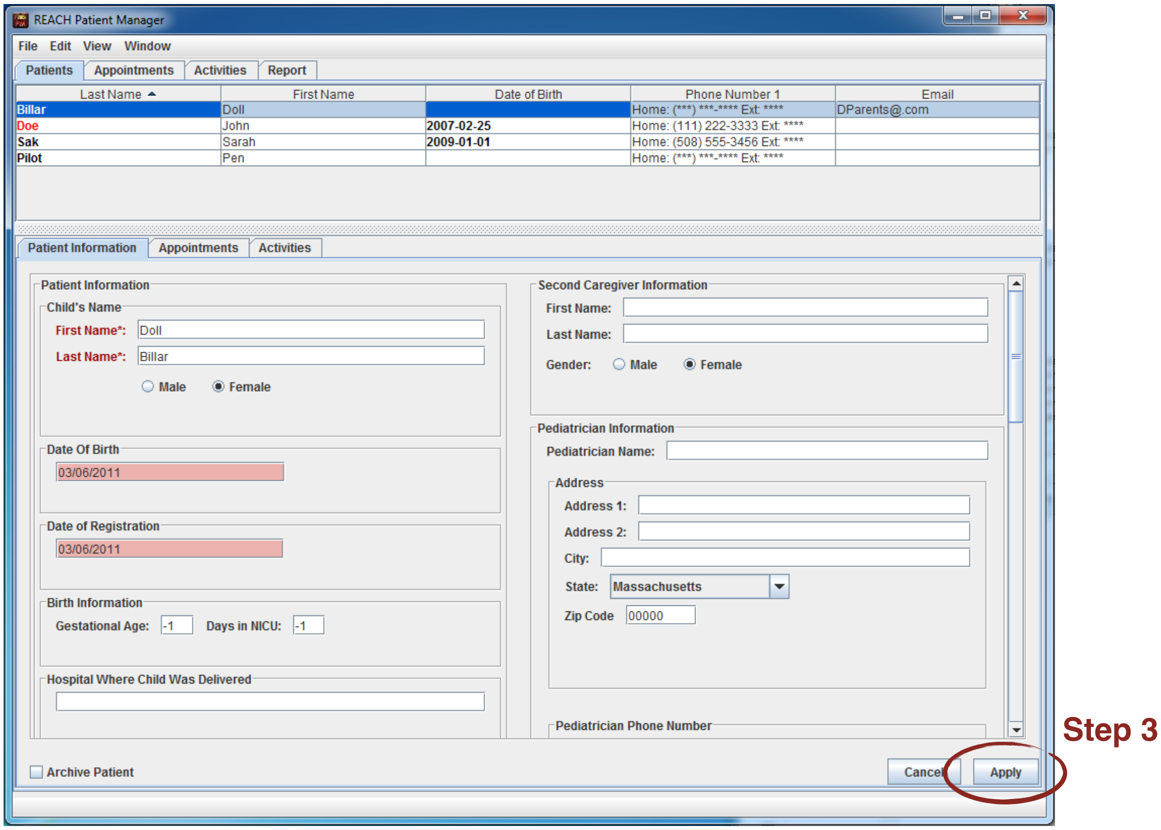
Patient Module

Add Patient

1. Click **Edit→New Patient**



2. The patient Form will pop out. Fill in some if not all of the Information into the specified fields.
3. Click apply at the bottom



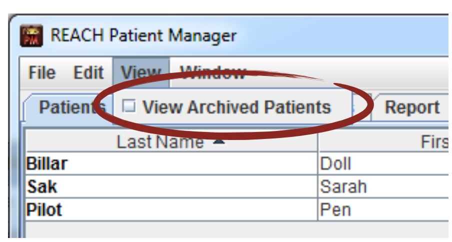
Edit Patient

1. Click the patient you want to edit in the patient table
2. The patient Form will pop out with all of the patient's information filled in. Fill in some if not all of the Information into the specified fields
3. Click apply in the bottom right-hand corner of the window.

View Archived Patients

An archived patient is a patient who is no longer participating in the program. Patients that are over 3 years old are considered over age for the program and their last names are marked red. To view archived patients:

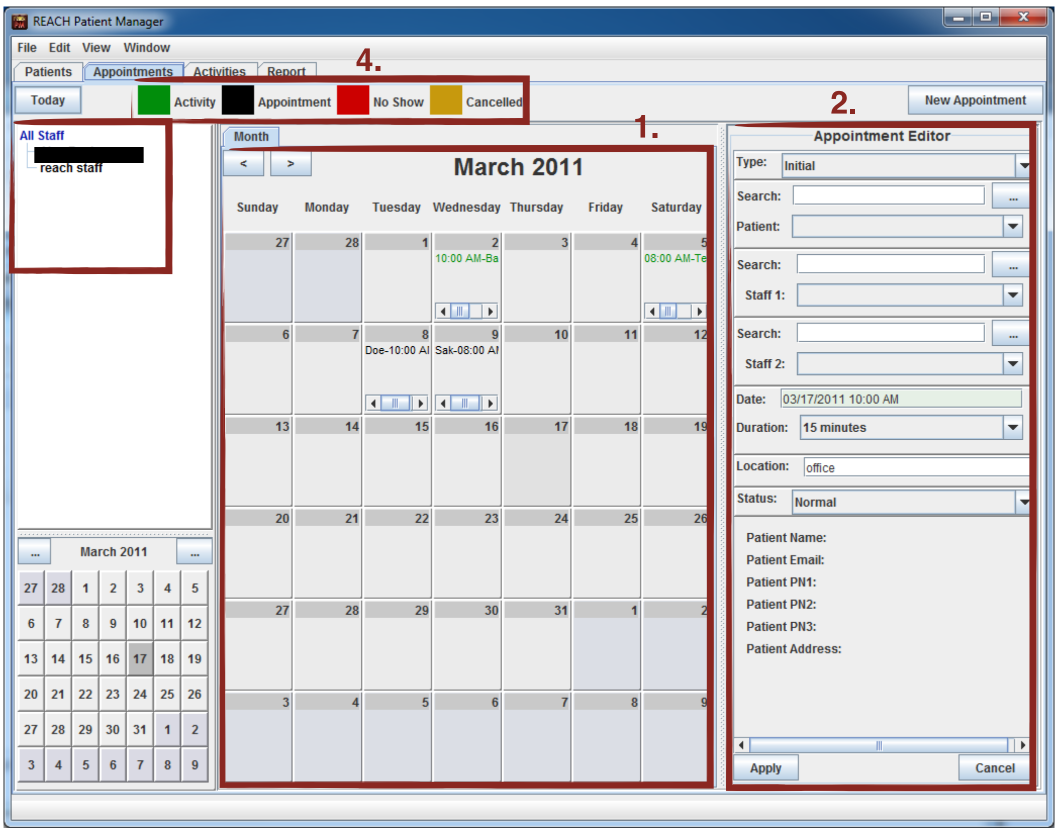
Click **View→View Archived Patients**



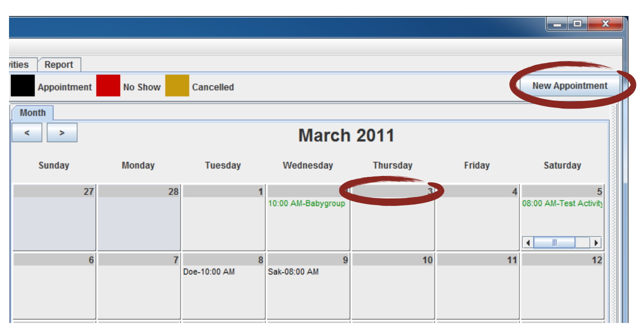
Appointment Module

The Appointment Module tracks appointments and schedules new ones.

1. **Month View**: Displays all of the appointments within the specified month according to the selected staff member.
2. **Appointment Editor**: Displays information about a selected Appointment
3. **Staff List**: Shows all of the staff members. Select one of these to filter the displayed appointments.
4. **Appointment Legend**: Shows the color of the specified color of an appointment or activity. Activities are green and the rest of the colors indicate the status of the appointment.



Add an Appointment



1. Either click **"New Appointment"** in the top right-hand corner of the screen or **double-click** the header of a day in the month view.
2. The Appointment Editor will open. Fill in the specified fields. **NOTE:** the **patient field** and **staff 1 field** must not be blank
3. Click **Apply** in the bottom left-hand corner of the **Appointment Editor** when finished.

Edit an Appointment

1. In the **Month View**, **single-click** on an appointment.
2. The **Appointment Editor** will open with the information of that appointment filled into the corresponding fields.
3. Click **Apply** in the bottom left-hand corner of the **Appointment Editor** when finished.

Filter Appointments by Staff Member

Click on a staff member's name in the **Staff List**. The **Month View** will refresh with only appointments that mention the selected staff member in the **Staff 1 field** or **Staff 2 field** in the **Appointment Editor**.

To remove the filter, **single-click "All Staff"** in the **Staff List**.

Activity Module

The Activity Module manages activities (group sessions) and tracks the patient as well as user attendance for each activity. This module is divided into 3 sections.

1. **Activity Table**: displays activities and important information about the activity.
2. **Activity Editor**: Displays the information about the selected activity. It also includes a tab to manage patient attendance and another tab to manage staff attendance.
3. **Navigation Bar**: Contains navigation functions to easily navigate activities on a date range basis to monthly basis.

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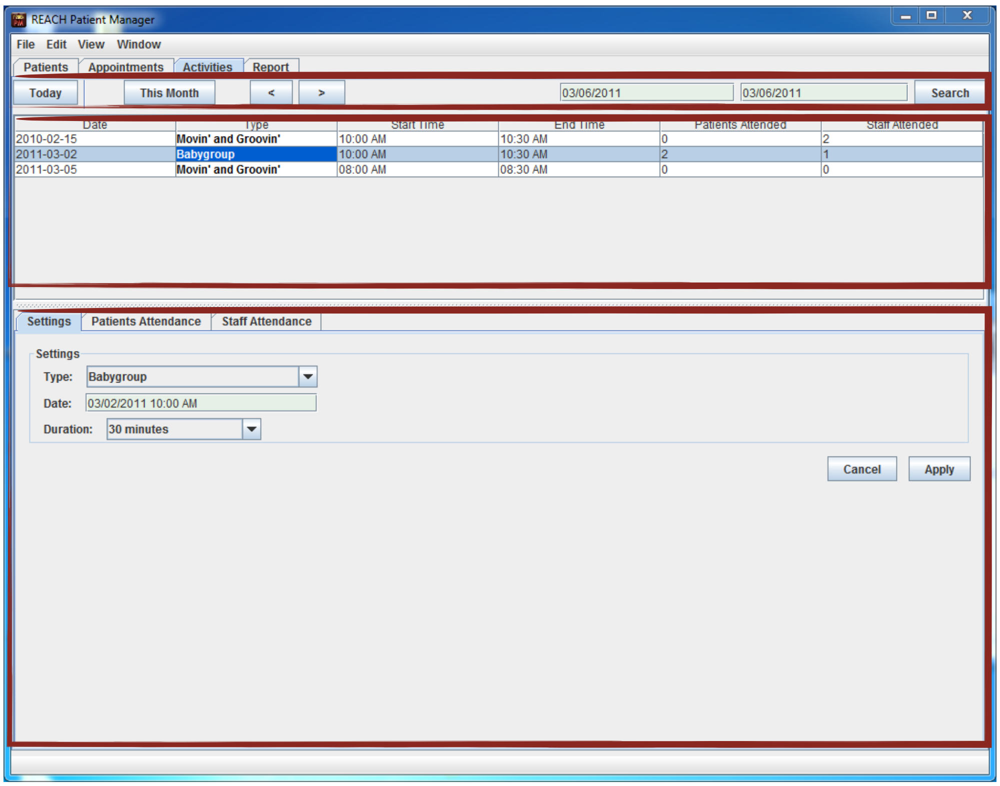
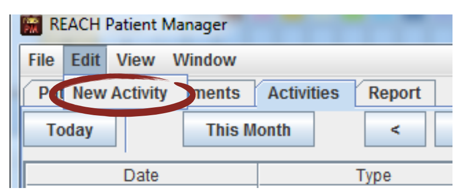


Add an Activity



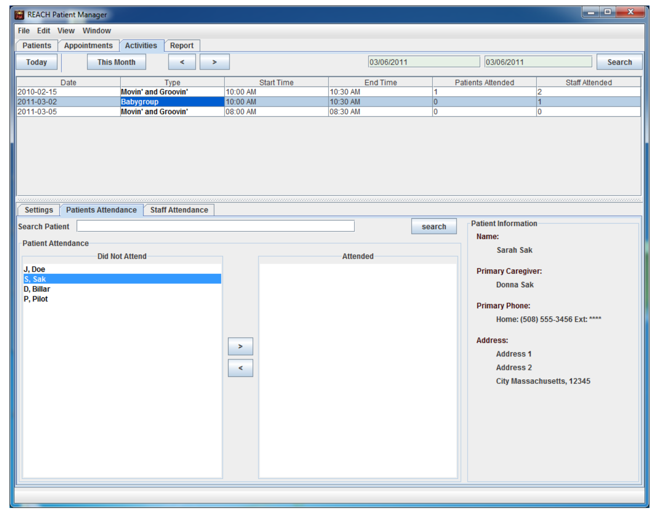
1. Click **Edit→New Activity**
2. The **Activity Editor** will open with the attendance tabs disabled.
3. Fill in the required fields.
4. Click **Apply** when finished.
5. The Activity will be created, which enables attendance. Go to **Edit Attendance** for more information.

Edit an Activity

1. Single-Click on an activity in the **Activity Table**.
2. The Activity Editor will open with the attendance tabs enabled.
3. Go to **Edit Attendance** for information regarding attendance tabs.
4. If editing the settings of an activity.
    4.1. Edit the fields
    4.2. Click **Apply** when finished.

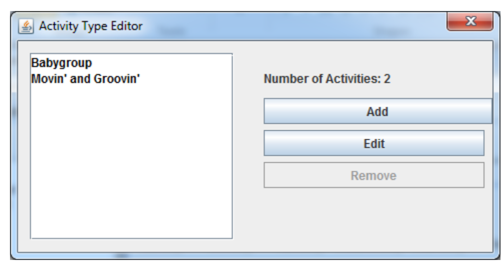
Edit Attendance

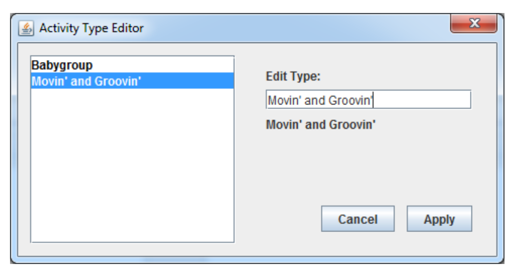
1. Add to **“Attended”**
    1.1. Select people from **“Did Not Attend”** list
    1.2. Click **>** button
2. Remove from **“Attended”** list
    2.1. Select people from **“Attended”** list
    2.2. Click **<** button
3. **NOTES:**
    3.1. Patient Attendance tab includes a search bar and a patient information pane. Both only function with the **“Did Not Attend”** list.
    3.2. To view patient information, click on the specified patient in the **“Did not Attend”.** The information will automatically fill in.
    3.3. To Search for a patient, type in either their first name or last name in the search field.



Add or Edit an Activity Type

1. Click **Window→Activity Types**
2. A window will open with a list of Activity Types on the left-hand side.
3. To edit an Activity Type
    3.1. Select the activity from the list.
    3.2. Click **Edit**.
4. To add and Activity Type click **Add**.
5. Fill in the **type field** with the new name.
6. Click **Apply**.
7. The window will ask for confirmation.
8. Click **Apply** again to confirm change.





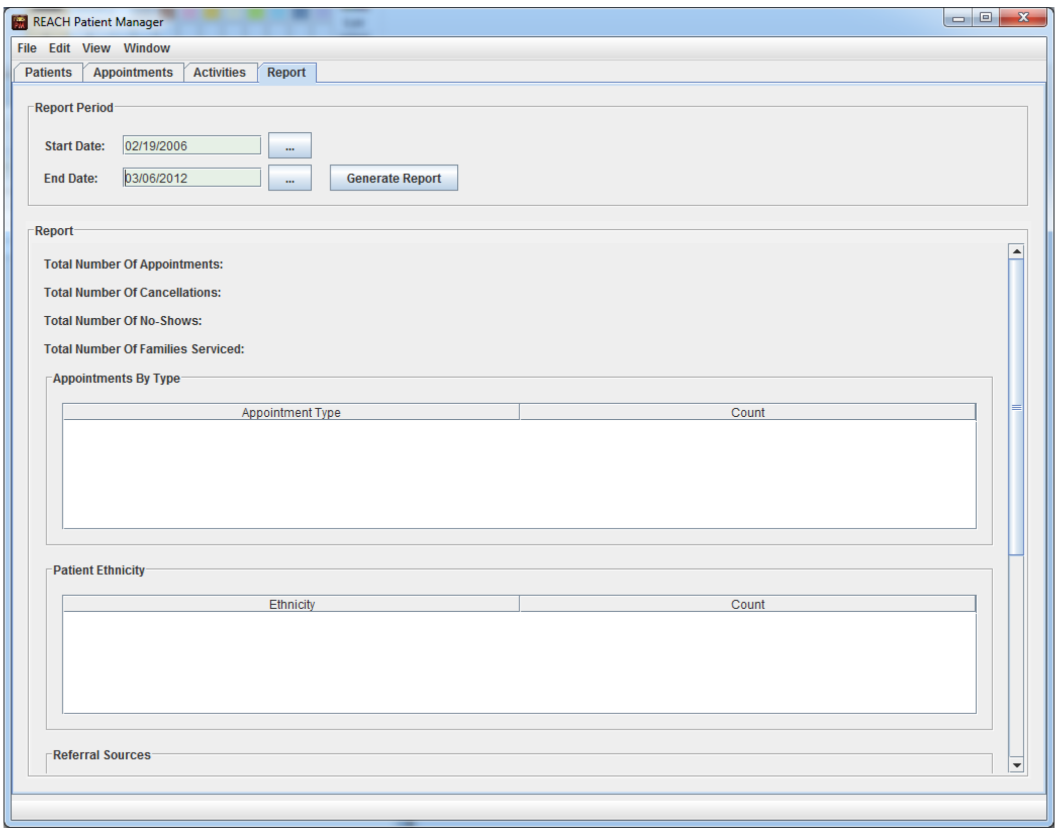
Remove an Activity Type

1. Click **Window→Activity Types**
2. A window will open with a list of Activity Types on the left-hand side.
3. Select the Type you want to remove.

3.1. If an Activity is using that type of activity, the activity cannot be removed.
3.2. The **"Number of Activities"** field shows you how many activities are of this type.
4. Click **Remove** when ready.
5. Click **Apply** to confirm decision.

Report Module

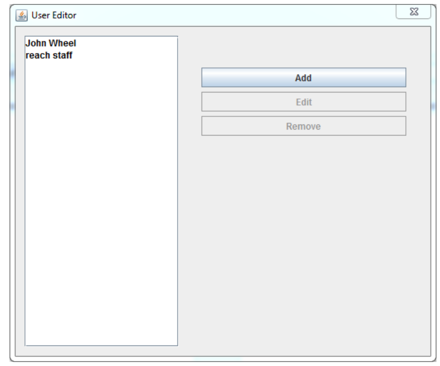
The Report module is designed to analyze the patient, appointment, and activity data between a certain date period then output the results in the specified fields.



Generate a Report

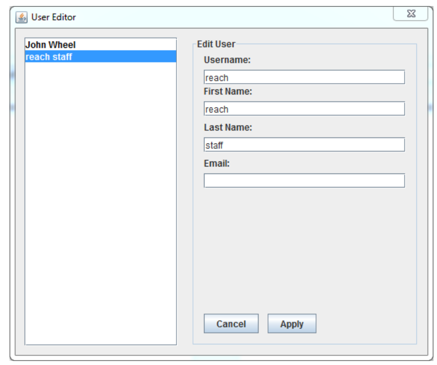
1. Select a start date
2. Select an end date
3. Click **Generate Report**.

Other Functions



Add and edit Staff members / Users

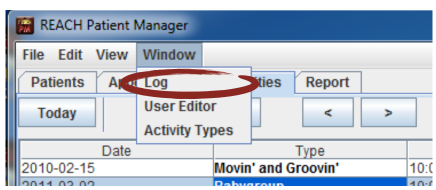
1. Click **Window→User Editor**
2. A window will appear called the User Editor.
3. **Add**
   3.1. Click **Add**.
   3.2. Fill in the specified fields (only username, first name, and last name are required)
   3.3. Click **Apply.**
   3.4. On confirmation screen, click **Apply** again.
4. **Edit**
   4.1. Click Edit
   4.2. Change the specified fields (only username, first name, and last name are required)
   4.3. Click **Apply.**
   4.4. On confirmation screen, click **Apply** again.
5. To refresh the Staff list in the appointment module, an application restart is required.

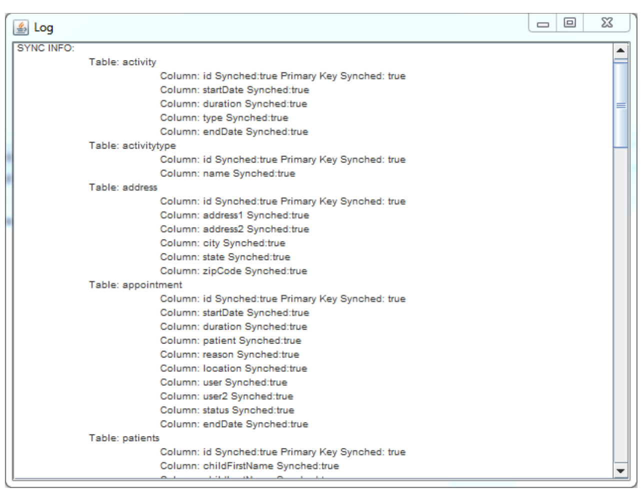


Show Log

This window is intended for debugging the application. If anything goes wrong, this log should show the reason. To open it:

Click **Window→Log**





Part 3: Troubleshooting & FAQ

Troubleshooting

Problems	Solutions
Database Connection Window Hangs	1. Check if the MYSQL server is running 2. Verify MYSQL database integrity 3. Verify User Permissions 4. Restart Computer
User interface doesn't work as expected (glitch)	1. Click **File→Refresh Module** 2. Restart Application
Added or Edited Staff Member does not appear correctly or at all	Restart the application

Known Issues

1. Staff member list won't update after the a user was edited.
2. The birth information fields are filled with -1.
3. Empty zip code fields are displayed as 00000.
4. On rare occasions, the appointment editor may not appear when supposed to.

Contact Information

[redacted]