1. Installing Case Manager

Installing from the Internet Download

1. Once you have downloaded the file (Setup.exe), double click it to start the installation program.
2. The setup program will then guide you through the steps to install ***Case Manager***.

The ***Case Manager*** Setup program will create an icon on the windows desktop and a menu item on the Start button (depending on your choice during setup).

Starting Case Manager

To start ***Case Manager***, simply double click the icon on your desktop (or start menu). ***Case Manager*** has security so that only authorised users can log onto the system. For the demo database the log on name is **DEMO** and the password is **START**. This log on procedure allows ***Case Manager*** to know who is logged on and display only the cases that the person has access to.

The Demonstration Database

When ***Case Manager*** is installed, a demonstration database file is copied to your computer. It is recommended that you use this database to learn the fundamentals of ***Case Manager***. That way, when you're learning how to use the program you can experiment without being too concerned about whether you are doing things the "*best way*" for your organisation.

Limitations of the Free Trial

There is only one limit to the free trial. After 30 days you will not be allowed to add any more new cases. After the trial period has expired, you will still be able to use ***every*** feature within ***Case Manager*** except adding new cases. Therefore, you should enter any trial cases you want to work on within the first 30days. If for some reason you want to re-start your trial, we can do this for you over the telephone.

Upgrading to the Full Version

If at any time you decide you want to purchase the program, we can remove the trial period restrictions over the telephone or via email. Please note though, we will require payment before we can do this.

2. The 15 minute 'Quick Tour'

The filing cabinet

The Case Selector on the left hand side is like your filing cabinet. You can sort and select the cases to suit yourself. For example the cases are currently organised by the client's name and their condition or injury. To look at what other types of information you can display click on the **Case List Criteria** toolbar button: . For example you can filter the list to show cases for only one employee or all employees. If you click on the Columns tab you can add the employer (in the contacts folder) or 'bill to' (i.e. insurer) so they are displayed in the list.

Once you have the list with the fields you are interested in you can sort the list by clicking on the column heading. Or you can shorten the list by clicking on the Filter button . This will add a blank field at the top of the list. If you type the first few letters of the client's name (or any other column) the list will display only those with the first few letters.

The client's file

Select the Judy Adams case by pointing and clicking on her name to highlight it.

Case Information

On the right hand side the tabs reflect the case file for the client. Click the Case tabs to display basic client and case information. All the client's contact information can be found in the Contacts tab. There is a quick link from the client's name which ever tab you are on which takes you directly to the client's contact details. The case information can be printed off to form the front pages of a paper file by clicking on the **Reports** toolbar button on the tool bar and selecting Case Details Report.

Documentation

In the Documentation tab you can store progress notes for a client (some people still use paper files for this). You can also store any other document types including MS Word, Pdf, Excel documents. All documents generated in Microsoft Word can be seen by the 'w' with the blue background. To create an Initial Assessment Report, click on the New Document button, then click on the MSWord tab and highlight Initial Assessment.dot from the list and click OK. This is a sample template that demonstrates how all the information stored in Case Manager can be automatically transferred over to the document (using templates) which saves lots of retyping. Close the document and return to Case Manager. (See the online help by pressing F1 while you are in Case Manager. Click on contents and then click on the 'Using Case Manager with MS Word' topic for details on how to create your own Case Manager templates or convert existing templates).

Contacts

A list of contacts from all the different companies that you deal with for that client is stored in the contact information found in the Contacts tab. To see the actual company list, click on the Company List button on the toolbar. If you click on the settings tab on the company list you can see you can also apply discounts to different companies you work for. Close the window by clicking on the cross button and the top right hand corner.

Costs and Accounts

Click on the Costs tab. This stores all the costs entered for a case with a total billed to date. The icon indicates that these costs are associated with an invoice. The costs can be entered from a rehabilitation plan. To see the rehabilitation plan for Judy Adams click on the Estimate tab. The list of plans are stored in the top half of the screen and the details of the plan highlighted in the bottom half of the screen. The plans are in a hierarchical structure with goal at the top of the tree, then objectives (which are optional) and the bottom level is activities. If you highlight the Functional Assessment activity you will see all the details at the bottom, including hourly charge rate, the duration or time estimated, if GST applies and whether the activity is completed. To add a new cost click on the New button . At the bottom of the tab click on the Description drop down list: select Functional Education and enter 2 hours. You will see Case Manager already knows all the charge codes and the hourly rate (you can personally set these codes and rates by accessing the Other Lists menu on the toolbar then the Activity list).

For all invoicing and payments click on the Accounts tab. You will see for the Judy Adams case there is already an invoice and payment. Highlight the invoice or payment and view the details in the bottom half of the screen. To create a new invoice click on the New Invoice button . Invoices can also be automatically generated (eg. Monthly) by going to the Tools menu and then select Invoice Generator

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For those using accounting packages you can transfer summary information into your Accounting package by creating a journal entry. Click on the Journal Entry button . One figure for Case Manager invoices and payments can be transferred into your accounting package as often as you like (daily, weekly or monthly).

Try Case Manager out with one of your own cases. To add a new case click on the New Case button on the Case Selector.