

JABR SOFTWARE, INC

Application Developers

SAHA Seniors

User Guide

JABR SOFTWARE INC.

SAHA Seniors User's Guide

© JABR Software Inc. 2005
423 Karen Ln. San Antonio Tx 78209
Phone 210.651.3155
e-mail duko@jabr.com

An Equal Opportunity Company

Table of Contents

| | |
|--|----------|
| INTRODUCTION..... | 2 |
| STARTING AND RUNNING THE SYSTEM | 3 |
| STARTING THE SYSTEM..... | 3 |
| NAVIGATION | 4 |
| <i>Main Menu</i> | 5 |
| <i>Input and Editing</i> | 6 |
| Locating a Resident | 7 |
| Adding a Resident..... | 8 |
| Edit information for a Resident..... | 9 |
| Information Sections within the record..... | 11 |
| Basic Information | 12 |
| Medical..... | 13 |
| Social Psychological – Memory | 14 |
| Resources | 15 |
| Referral..... | 16 |
| Progress Notes..... | 17 |
| Follow – Up..... | 18 |
| <i>Data Transfer</i> | 19 |
| Import Specific information..... | 19 |
| <i>Transportation</i> | 22 |
| <i>Reports</i> | 23 |
| <i>Utilities</i> | 24 |
| UPDATE FROM THE WEB..... | 27 |

Introduction

This manual describes the system that has been designed for the **San Antonio Housing Authority** known as SAHA Seniors.

The screens, and the procedures contained in this manual are intended to be used only by the system users that work for SAHA if there is any interest in the system outside of SAHA please contact JABR Software @ 210.651.3155.

The system is designed to collect information in the field and transport that information to a central system located at the main office.

Starting and Running the System

Starting the system

- The system has been installed on each portable machine and on the desktop there is an Icon.



- Click the Icon to start the system

Navigation

Navigation throughout the system is button driven. The standards for the system are

- Buttons allow you to navigate from screen to screen.
 - Screens with buttons DO NOT Save information
- Doors close screens.
 - Screens with Doors have information that needs to be saved. The information in the screen will automatically be saved when the door is clicked.

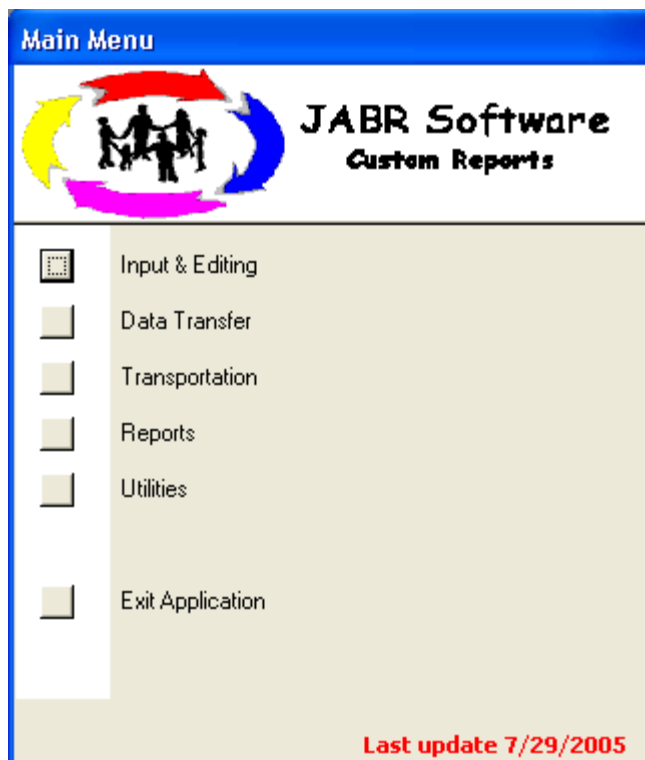


Input & Editing



Main Menu

The Main menu is the central point of the system and all roads lead back to the Main Menu.



- All sections of the system launch from the Main Menu
- Note the Revision Information in the bottom right corner of the screen. Each notification you receive from JABR will tell you the revision information you should be looking at.

Input and Editing

- The input and editing section is where to look for Residents in your system.
- It is important to look for residents instead of adding residents.
- The system will not allow the same resident to be added more than one time the exact same way. This means that basic resident information the system needs to create a “client” must be different for each individual resident.
- The system automatically assigns a unique ID for each resident.
 - The ID is the first 3 letters of the last name, the date of birth information and the first 3 letters of the first name
 - Before a resident can be entered into the system as a new resident these fields must be present.
 - First Name
 - Last Name
 - Date of Birth
 - Gender

Locating a Resident

- Locate a resident by entering any part of the first name, last name, or social security number. Or any combination of these fields.
- Touch the enter key, or click the “Show” button to see the results of the search
- If the resident is not in the list they will need to be added.

Find Seniors

First name

Last name

SS #

| | ClientID | First Name | Last Name | SS # |
|---|--------------|------------|-----------|-------------|
| ▶ | Smi101055Bob | Bob | Smith | 212-12-3333 |
| | TRA052430BOB | BOBBY | TRAEGER | 458-36-6102 |
| | WHE100542BOB | BOBBIE | WHEELER | 463-76-6749 |
| | WRI033142BOB | BOBBIE | WRIGHT | 462-64-9149 |

Record: of 4

Adding a Resident

- Click the Add New button from the Find Seniors Screen

- Add the first name, last name, gender, SS# and Date of Birth to create a new resident in the system. After the Date of Birth has been entered the age will appear. This is the notice the record has been created for this resident
- When the information for this resident is complete, close the door and the information will save.
- If not enough information is in the record to create a new client the following message will appear.

Edit information for a Resident


- When a resident is located double click the ClientID field and the Assessment history will appear

SAHA Senior Information

SAHA - ELDERLY AND DISABLED SERVICES RESIDENT ASSESSMENT TOOL

| Assess Date | Profile | Next Assess Date | Case Status |
|-------------|---------|------------------|-------------|
| 7/29/2005 | Initial | | OPEN |

Add



- All existing assessments will appear in the gray box at the bottom left of the screen
- To add a new assessment, click the Add button
- To access the information for the assessment double click the selection

SAHA Senior Information

Basic Information | Medical | Social-Psychological-Memory | Resources | Referral | Progress Notes | Follow Up

First Name: Last Name: Gender: SS#: DOB: Age:

Ethnicity: Marital Status:

Move in Date:

Apartment Complex: Apt#: Zip: Phone#:

Type: Case Status: Assessment Date: T Assigned Caseworker:

Emergency Contact: Relationship: Address: Phone:

Bilingual: Preferred Language: Smoker: Pet(s):

Income: SS\$ SSI\$ VA\$ Ret\$ Ann\$ Other\$

Expenses: Rent\$ Medication\$ Utilities\$ Phone\$ Groceries\$ Other\$

Insurance: Medicare# Medicaid# Type: Other:

ACTIVITIES OF DAILY LIVING (ADL)-(mark if needs help with)

ambulation toileting transferring
 dressing self feeding grooming
 bath/shower

INSTRUMENTAL ACTIVITIES OF DAILY LIVING (mark if needs help with)

shopping
 managing finances
 managing medications
 using telephone
 uses transportation
 preparing meals
 light housekeeping


*** if three checks are marked resident is identified as frail*
*** if one/two checks are marked resident is identified at-risk*

Is resident: (check appropriate) Independent At-risk Frail

Resident Signature Check

Release of Information
 Confidential Information
 Information is Correct
 Resident Refused Services

| Assess Date | Profile | Next Assess Date | Case Status |
|-------------|---------|------------------|-------------|
| 7/29/2005 | Initial | | OPEN |



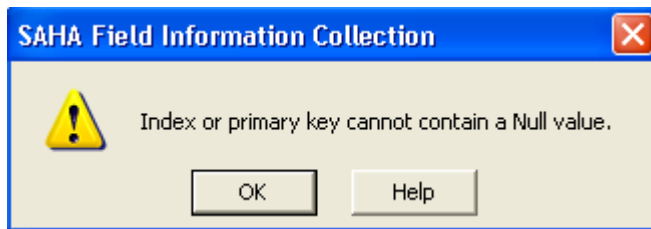
- Navigate to the different sections by clicking the appropriate tab at the top of the screen.

Information Sections within the record

- Basic Information
- Medical
- Social-Psychological Memory
- Resources
- Referral
- Program Notes
- Follow – Up

Some Rules

- Drop Box information is limited to the Items in the list
- Updating information in the drop boxes is done thru the “Data Transfer” button on the main menu
 - This process is described later in the manual
- Different screens require basic information. If basic information is not entered an the user attempts to move to the next screen, a prompt will appear.



- Clear the prompt by Clicking “OK” and returning to the screen. Fill in the required information that is noted by *
- Clicking the bar on the left side of the record can choose records that need to be selected for printing or deleting.



- If the bar on the left side of the screen shows a Pencil, the record is being edited.



- If the bar on the left side of the screen shows a Star, the record is empty and a new record will be inserted in this spot.



Basic Information

SAHA Senior Information

Basic Information
Medical
Social-Psychological-Memory
Resources
Referral
Progress Notes
Follow Up

First Name: Last Name: Gender: SS#: DOB: Age:

Ethnicity: Marital Status:

Move in Date:

Apartment Complex: Apt#: Zip: Phone#:

Type: Case Status: Assessment Date: Assigned Caseworker:

Emergency Contact: Relationship: Address: Phone:

Bilingual: Preferred Language: Smoker: Pet(s):

Income: SS\$ SSI\$ VA\$ Ret\$ Ann\$ Other\$

Expenses: Rent\$ Medication\$ Utilities\$ Phone\$ Groceries\$ Other\$

Insurance: Medicare# Medicaid# Type: Other:

ACTIVITIES OF DAILY LIVING (ADL)-(mark if needs help with)

ambulation toileting transferring
 dressing self feeding grooming
 bath/shower

*** if three checks are marked resident is identified as frail
 *** if one/two checks are marked resident is identified at-risk

Is resident: (check appropriate) Independent At-risk Frail

Resident Signature Check

Release of Information
 Confidential Information
 Information is Correct
 Resident Refused Services

INSTRUMENTAL ACTIVITIES OF DAILY LIVING (mark if needs help with)

shopping
 managing finances
 managing medications
 using telephone
 uses transportation
 preparing meals
 light housekeeping

- In fields with Date information, click the button with a “T” and today’s date will appear. If the date to be entered is not today, just enter the information. The record will not be updated until the cursor is moved from the field by either touching the Tab key or the Enter key.

Medical

SAHA Senior Information

Basic Information | **Medical** | Social-Psychological-Memory | Resources | Referral | Progress Notes | Follow Up

Ambulates without assistive devices Devices:

Medical Equipment

Vision is: Wears glasses: Comment:

Hearing is: Wears hearing aids: Comment:

Dental: Comment:

Primary Physician Phone

Address Alt Phone

| Allergies | Health Problems | Medications |
|----------------------|----------------------|----------------------|
| <input type="text"/> | <input type="text"/> | <input type="text"/> |

Comments:

Social Psychological - Memory

The screenshot displays the SAHA Senior Information system interface. At the top, there is a blue header with the text "SAHA Senior Information". Below the header is a navigation bar with several tabs: "Basic Information", "Medical", "Social-Psychological-Memory", "Resources", "Referral", "Progress Notes", and "Follow Up". The "Social-Psychological-Memory" tab is currently selected. The main content area is divided into two columns. The left column is titled "Social Observations" and contains a drop-down menu with a right-pointing arrow and a downward-pointing arrow. The right column is titled "Psychological Observations" and also contains a similar drop-down menu. Below these two columns is a large text area labeled "Comments:".

- Information in either box is supplied from the drop down list.
- Only information in the drop down list can be added.
- If more information needs to be added to the list, contact JABR and a trouble ticket will be created and researched, and approved before additions are made.

Resources

SAHA Senior Information

Basic Information | Medical | Social-Psychological-Memory | **Resources** | Referral | Progress Notes | Follow Up

COMMUNITY RESOURCES PRESENTLY IN PLACE

Provider Agency: No. of Hours

Home Health Agency: No. of Hours:

Nutrition Nutrition Type:

Adult Day Care Agency: Frequency:

Public Assistance: Food stamps Case #: Amount\$

Telephone Assistance

Utilities Assistanc

Other Resources:

Transportation:

Working A/C in place

Resident Signature Date

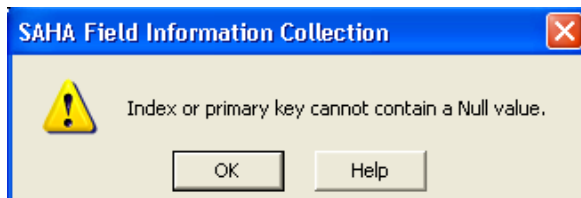
Case Manager Signature Case Manager: Date:

Re-Assess date due

Referral

The screenshot displays the SAHA Senior Information system interface. At the top, there are navigation tabs: Basic Information, Medical, Social-Psychological-Memory, Resources, Referral, Progress Notes, and Follow Up. The main content area is titled "INDIVIDUAL/RESIDENT REFERRAL" and contains two identical forms. The top form is populated with the following information: Date: [empty], Resident Name: Bob Smith, Resident Address: [empty], Zip Code: [empty], Phone: [empty], Referral To: [empty], Address: [empty], Phone: [empty], Referred By: [empty], Title: [empty], Office: [empty], Cell: [empty], Fax: [empty], Email: [empty], Services Needed: [empty], Referral Status: [empty], and Comments: Put information in a referral and a new one will appear. The most recent record will be at the top. The bottom form is a blank duplicate of the top one. A scroll bar is visible on the right side of the window, indicating that multiple records can be viewed.

- Adding information to the Referral form will automatically create a new record below the one shown on the screen. This is evident because there will be a scroll bar to the right side of the window and a blank form will appear.
- Adding a new record will automatically insert the Assigned Caseworker Name into the Referred By field.
- There must be information in the Date Field and the Referral To field to create a record. If these fields are not populated the following message will appear



- Click OK and enter information into the field that is empty or tap the "ESC" key and information will not be saved.
- If for any reason the Referral needs to be deleted:
 - Click on the bar to the left side of the window (the bar will turn black which means the record has been selected)
 - Touch the delete key on the keyboard
 - A reminder will appear letting you know the deletion is permanent
 - If you choose to delete the record, it cannot be retrieved.

Progress Notes

SAHA Senior Information

Basic Information | Medical | Social-Psychological-Memory | Resources | Referral | **Progress Notes** | Follow Up

Date 08/03/2005 **T** Clicking on the date will input the assigned caseworker name in the Case Manager Signature field

Subject: []

Resolved

Case Manager Signature Marie Bazan **Signature Date** []

* **Date** [] **T**

Subject: []

Resolved

Case Manager Signature [] **Signature Date** []

- Adding information to the Progress Note form will automatically create a new record below the one being added. This is evident because there will be a scroll bar to the right side of the window.
- Clicking on the “T” button will add today’s date and the assigned caseworker name to the Case Manager Signature field
- Click Resolved when the Progress note is complete
- There must be a date in the date field for the progress note to be logged.
- If for any reason the Progress Note needs to be deleted:
 - Click on the bar to the left side of the window (the bar will turn black which means the record has been selected)
 - Touch the delete key on the keyboard
 - A reminder will appear letting you know the deletion is permanent
 - If you choose to delete the record, it cannot be retrieved.

Follow - Up

SAHA Senior Information

Basic Information | Medical | Social-Psychological-Memory | Resources | Referral | Progress Notes | Follow Up

FOLLOW-UP ASSESSMENT

Follow up Date T

Moved since your last assessment? APT Phone Changed? Phone

Has Insurance Changed? New Insurance Carrier:

Has Medicare Changed? Has Medicaid Changed?

Household Income Change? SS\$ SSI\$ VA\$ RET\$ Other\$

Contact Person Changed? Name: Phone# Relationship

Hospitalized since last visit? Explain

Have Medications Changed?

Has Physician Changed? New Primary Physic Phone

Health Problem Change? Explain

Home health change? Agency Provider Hrs/wk Schedule

Household Info Changed?

Rent\$ Medication\$ Utilities\$ Phone\$ Groceries\$ Other\$

Continue Independant living? Needs/Concerns

Overall Health Status

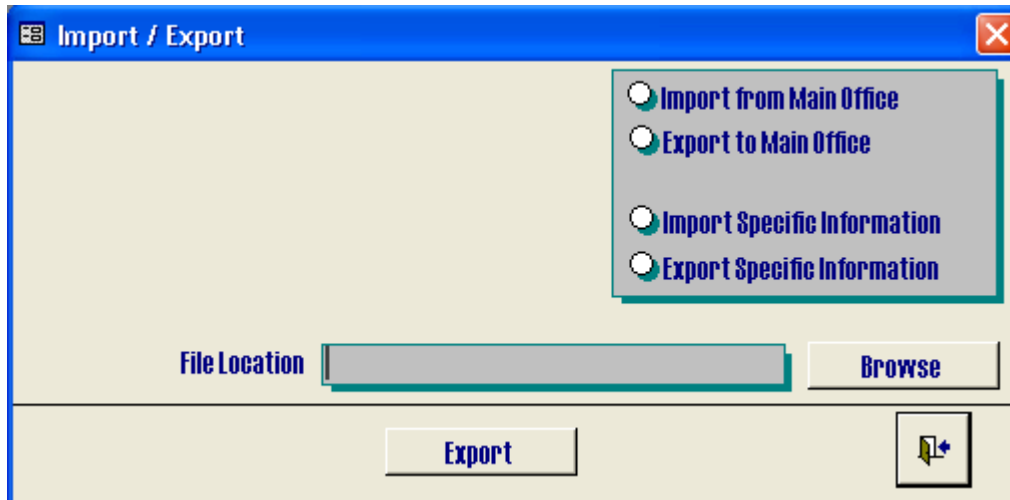
Resident Name Date Next Followup Date:

Case Manager Date

- Adding information to the Follow-Up form will automatically create a new record below the one shown on the screen. This is evident because there will be a scroll bar to the right side of the window.
- If for any reason the Follow-Up needs to be deleted:
 - Click on the bar to the left side of the window (the bar will turn black which means the record has been selected)
 - Touch the delete key on the keyboard
 - A reminder will appear letting you know the deletion is permanent
 - If you choose to delete the record, it cannot be retrieved.

Data Transfer

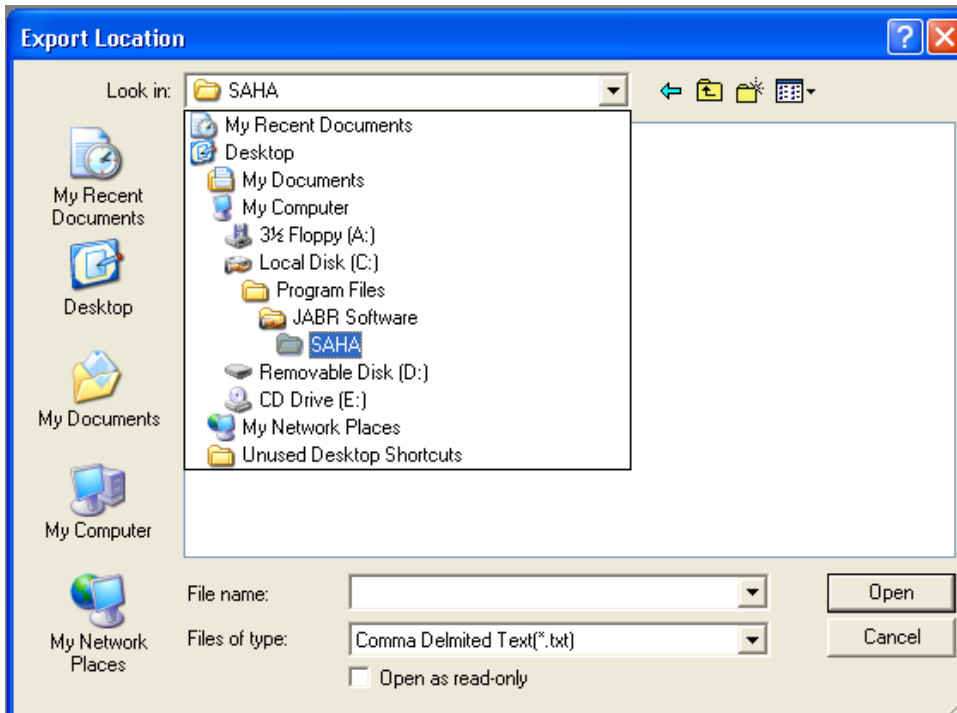
This section is used to update drop boxes, Import information from the main system, and Export information to the main system from the mobile application.



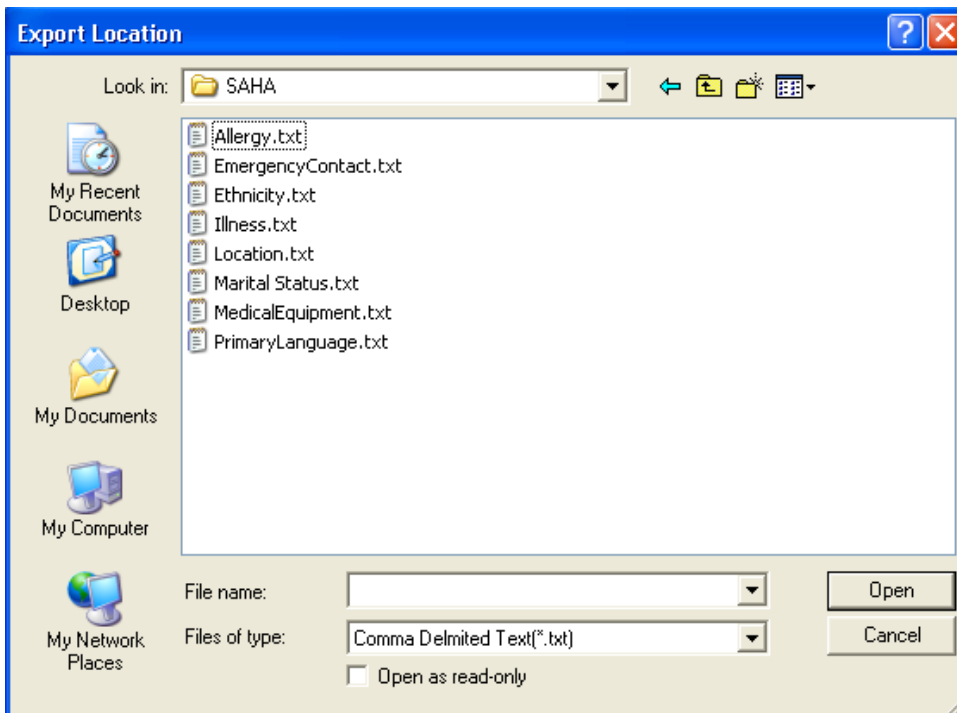
- Import from the Main Office is still under construction
- Export to the main office is still under construction
- Import specific Information
 - This is used to update drop boxes
 - Make sure the downloads from the web go to the laptop machine before updating system
 - Files for drop boxes have a .txt extension in the file name
- Export specific information is still under construction

Import Specific information

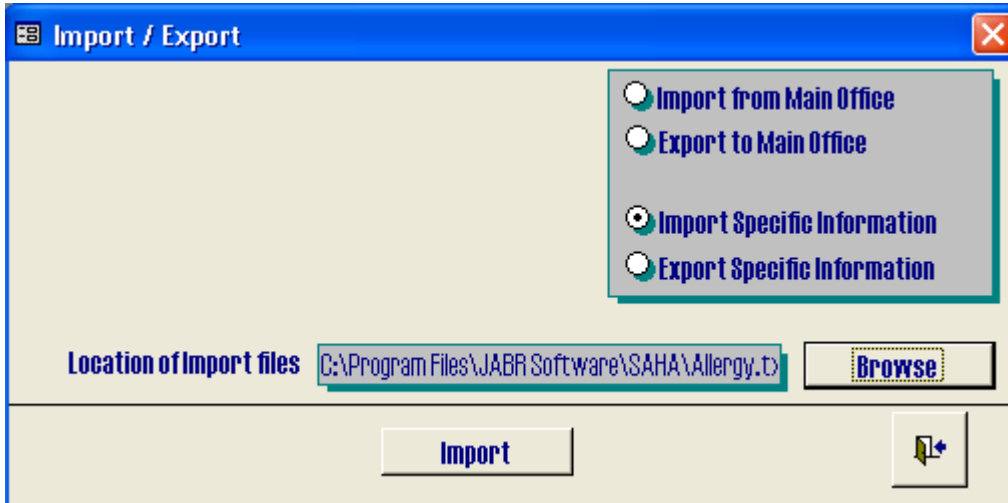
- Click the Import Specific Information bubble and headings on the screen change
 - “File Location” changes to “Location of Import Files”
 - “Export changes” to “Import”
- Click the “Browse” button to locate the files
 - The default location for the files is C:\Program Files\JABR Software\SAHA



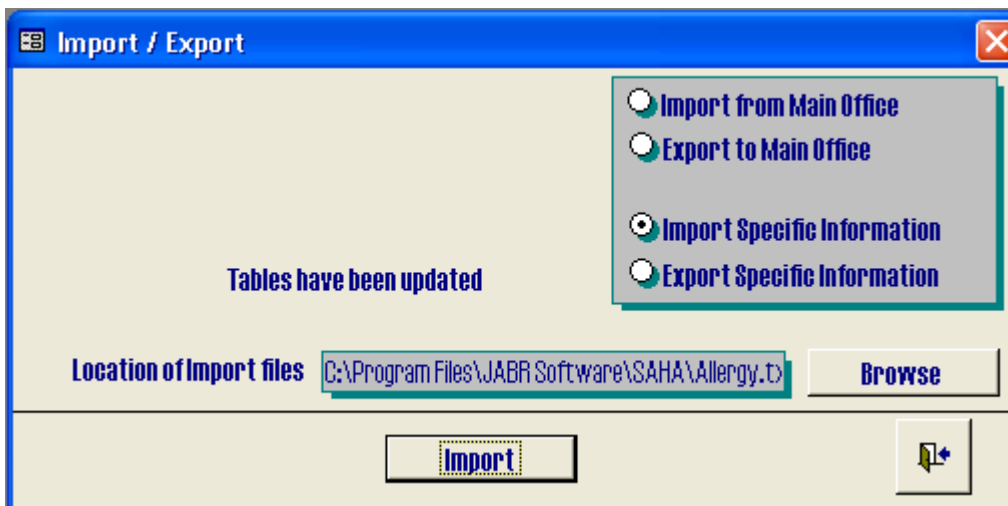
- There can be up to 10 files for drop boxes in the system



- Double click any of the files to fill in the location on the import screen



- Click the “Import” button and the all the information in all the drop down lists will be updated
- When the information is complete you will be prompted in the main screen



- This process only needs to be done one time

Transportation

The screenshot shows a software interface for logging transportation events. The form is titled "Transportation" and contains the following fields:

- TransportDate**: A date selection field with a "T" button next to it.
- Senior**: A dropdown menu for selecting a senior.
- Event**: A text input field for the event name.
- Destination**: A text input field for the destination.
- Qualifier**: A dropdown menu for additional information.
- Group**: A checkbox to indicate if the resident is with a group.

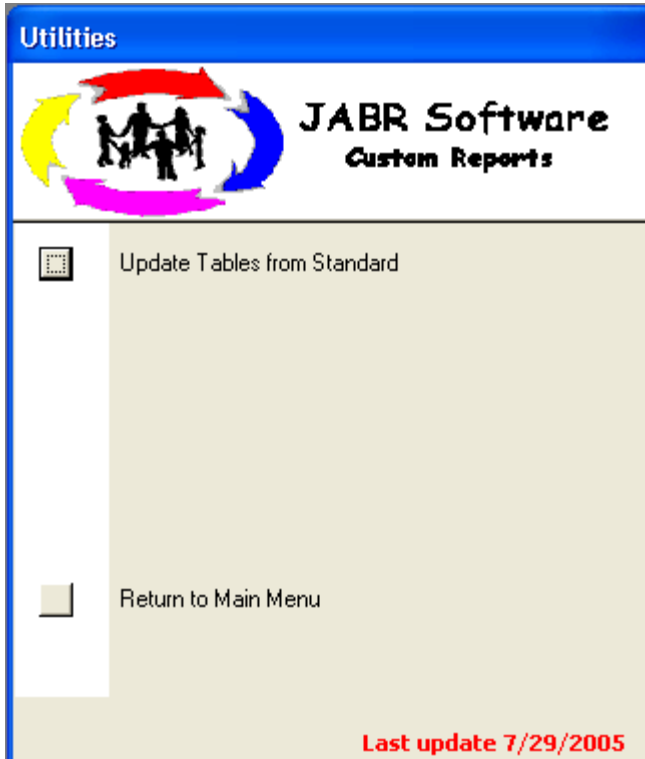
A printer icon is located at the bottom right of the form area.

- The transportation section is used to track clients that went to an event
- The date field is for the date of the event. If you are logging an event that happens today, click the “T”
- The only seniors that will appear in the “Seniors” field will be residents that you have entered on your machine. You will not see the entire list that is in the “Find Senior” Screen
- Enter the rest of the fields for what event the transportation is for
- If the Resident is with a group for the event being logged, click the “group” check box

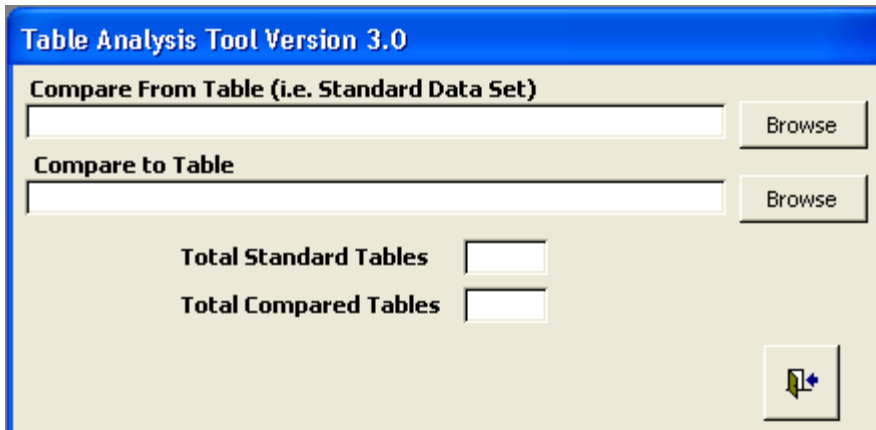
Reports

- The Reports section is under construction

Utilities



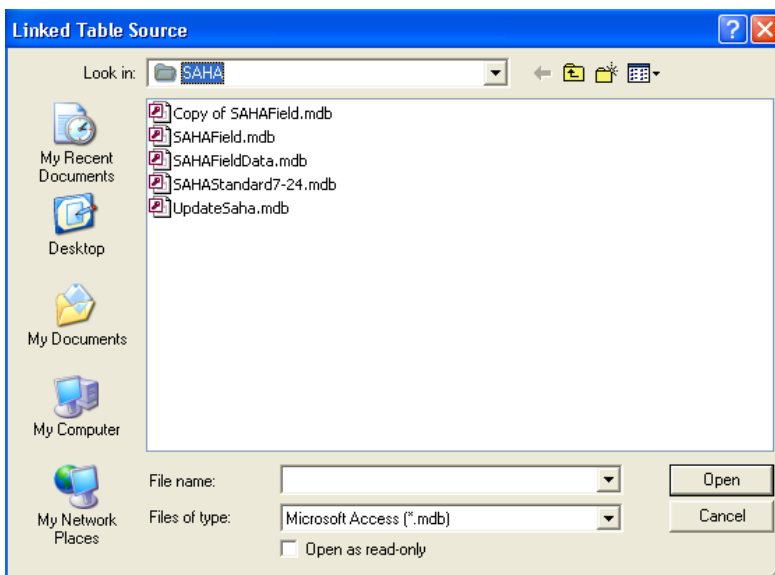
- Update Tables from Standard – This option is necessary to update the data tables when there is a change in the program
- Each time there is a change made to the program and a field is added, the e-mail you receive will tell you whether this feature needs to be completed.
- Included in the e-mail will be the name of the standard to use for the latest update.



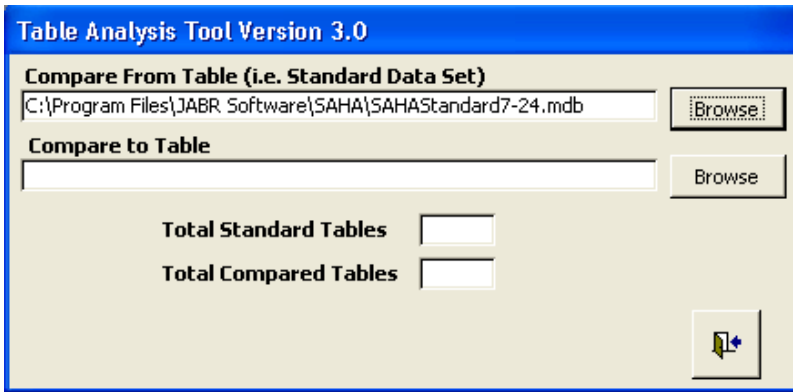
- Before this process can be run, the update program must have been downloaded from the web.
- The download procedure is described in the next chapter
- To update the tables in the system the computer must compare what is on your machine with the information that was sent with the update. By default the update files are located on the hard drive of the machine the update was sent to, this location is C:\Program Files\JABR Software\SAHA
- There will be a data file, “SAHAFieldData.mdb”, and a standard file, which will be described in the e-mail you get letting you know there is an update.



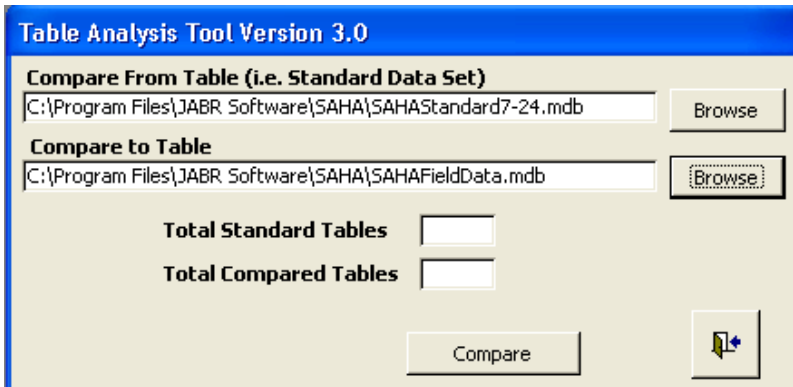
- The path for the standard file will be placed in the top field.
- To do this click the browse button and follow the path to the folder where the files are (C:\Program Files\JABR Software\SAHA)



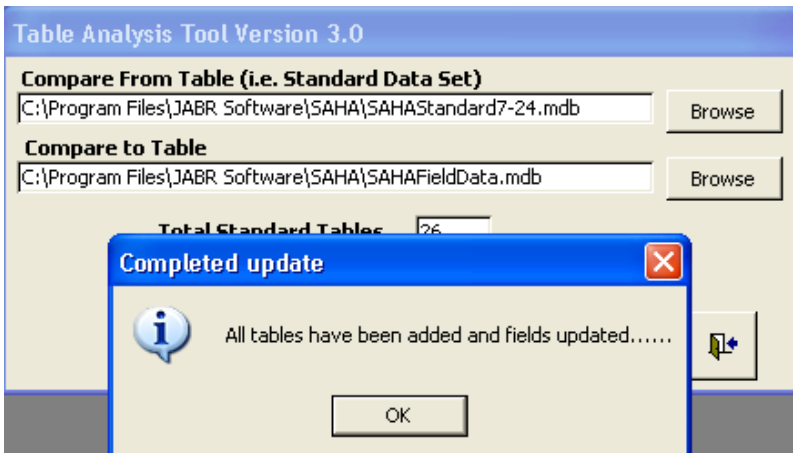
- Choose the standard file, by double clicking the file, and you will be returned to the original screen



- Click the browse screen and locate the SAHAFielddata.mdb file, in the same folder



- Click the “Compare” button and when the comparisons are complete you will get a message



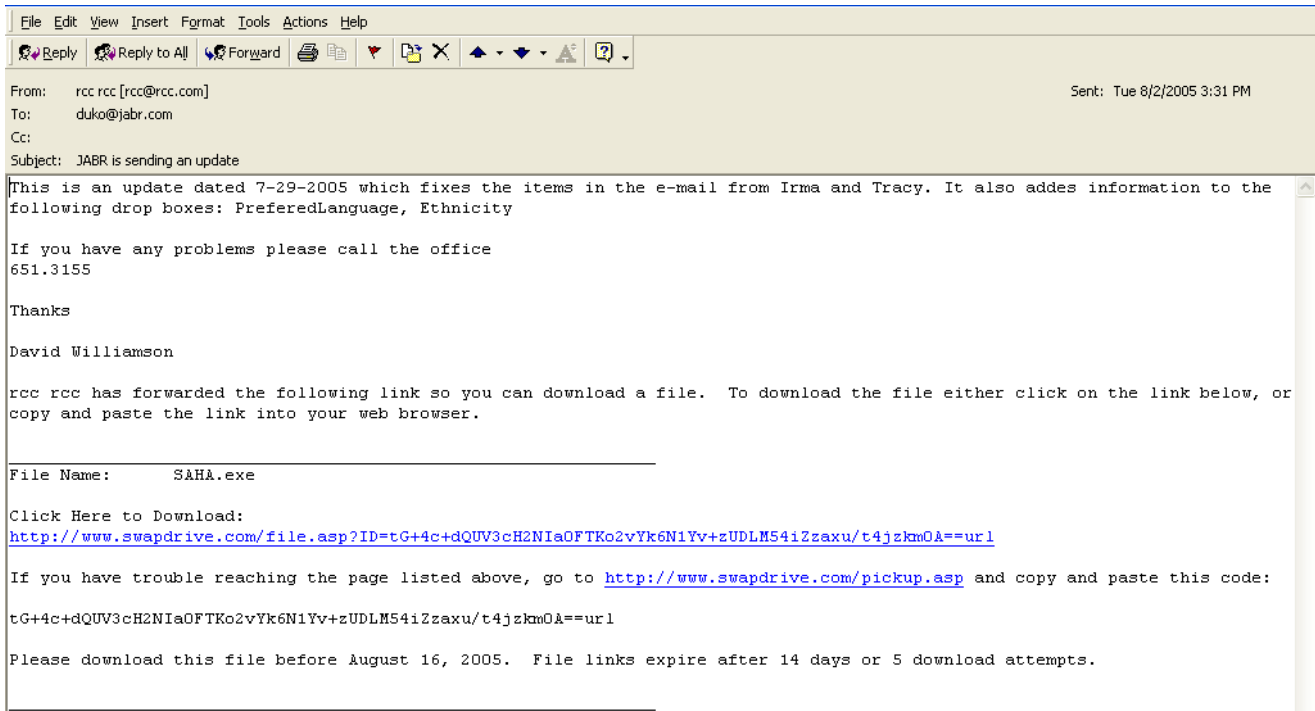
- The process is complete. Click the OK button, then the Door and you will be back at the main menu

Update from the Web

Each time there are changes to the application your laptop needs to have these changes installed. You will receive an e-mail notifying you there are changes and the files that are involved.

You will also have a link to the location where the files are.

- The e-mail will contain information about the update
- Within the e-mail will be a link where the download file is.



File Edit View Insert Format Tools Actions Help

Reply Reply to All Forward

From: rcc rcc [rcc@rcc.com] Sent: Tue 8/2/2005 3:31 PM
To: duko@jabr.com
Cc:
Subject: JABR is sending an update

This is an update dated 7-29-2005 which fixes the items in the e-mail from Irma and Tracy. It also adds information to the following drop boxes: PreferredLanguage, Ethnicity

If you have any problems please call the office
651.3155

Thanks

David Williamson

rcc rcc has forwarded the following link so you can download a file. To download the file either click on the link below, or copy and paste the link into your web browser.

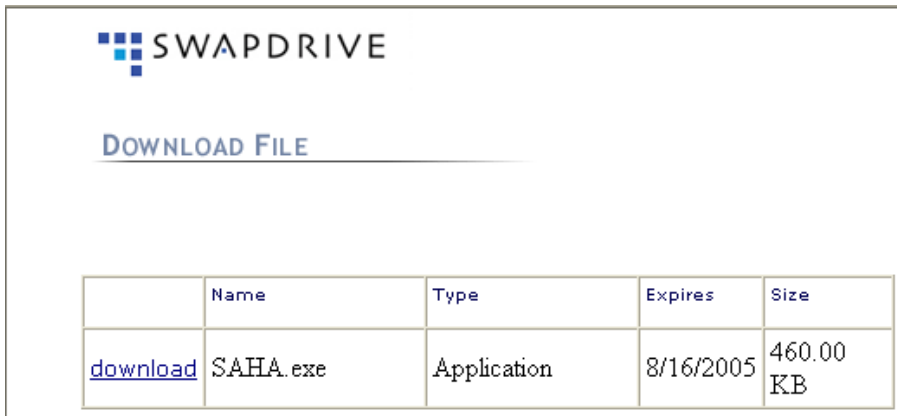
File Name: SAHA.exe


Click Here to Download:
<http://www.swapdrive.com/file.asp?ID=tG+4c+dQUV3cH2NIaOFTKo2vYk6N1Yv+zUDLM54i2zaxu/t4jzkm0A==url>

If you have trouble reaching the page listed above, go to <http://www.swapdrive.com/pickup.asp> and copy and paste this code:
tG+4c+dQUV3cH2NIaOFTKo2vYk6N1Yv+zUDLM54i2zaxu/t4jzkm0A==url

Please download this file before August 16, 2005. File links expire after 14 days or 5 download attempts.

- Click on the link

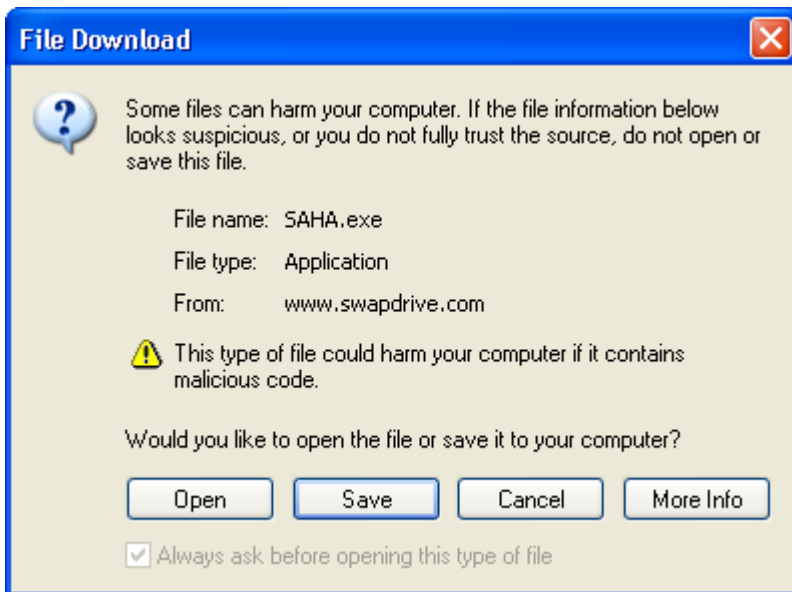




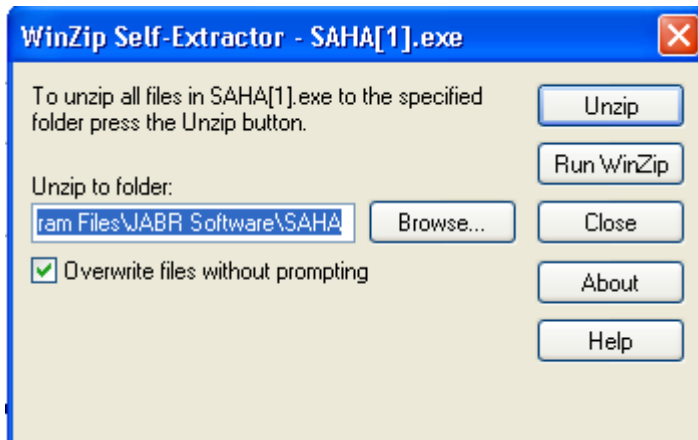
[DOWNLOAD FILE](#)

| | Name | Type | Expires | Size |
|--------------------------|----------|-------------|-----------|--------------|
| download | SAHA.exe | Application | 8/16/2005 | 460.00 KB |

- Click Download and you will receive a prompt about safety.



- Click Open, and you will see a WinZip extractor screen



- Click Unzip in the upper right corner of the screen
- When the files are extracted you will see a message
- Close the extractor and the e-mail and the browser down and start the program
- At this point the instructions will need to be followed.
 - If tables need to be updated follow those instructions
 - If the drop boxes need to be updated follow those instructions.