



SOC MIS User Guide

SECTIONS:

Introduction – Getting Started - Login – System Controls

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Version 1.0



Portal of Interaction Information Technology

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Revision History

Version	Section	Description	Page(s)	Date



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About This Manual

Welcome to the *PACE+ System of Care (SOC)* application of Interaction Information Technology. This User Guide gives you step-by-step procedures/definitions on how to use and operate the **SOC MIS** application. What is PACE+ System of Care?

PACE+ System of Care (SOC) is a comprehensive and community web-based client information management software system that meets the specific needs of mental/behavioral/social services health initiatives. It provides online data management services for multiple users/agencies empowering communities with their network of care building upon existing services, supports, and programs in the community. PACE+ SOC is an innovative solution to create and coordinate a strong collaborative community-based partnership of caregivers, families, service agencies, teacher, evaluators, coordinators, and other parties who care for the child/youth/young adult and facilitate the movement through the array of offered services.

The *SOC MIS* application is composed of several components by Interaction Information Technology (IIT), the following components maybe referred to by their name within this manual and the application. These components are:

- **ContentDistributor™** (*security, framework, portlet management, & administration tools*)
- **PACE+** (Provider Automated Client Empowerment) **System of Care (SOC)**
- **ilimage** (*imaging and document uploads*)
- **iWorkflow** (*workflow management, aka Activity List*)
- **iReports** (*report management*)

Technology used for the *SOC MIS* – Microsoft SQL Server, XML, ASP.NET & C#. The *SOC MIS* application is being self-hosted by Orange County IT Department. Additional information will be discussed about these components within the manual. The following components for the system application collectively, shall be called the "**SOC MIS**").

Notational Conventions

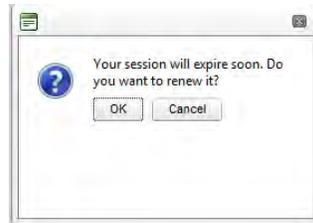
- Throughout this document there are important text items, sentences or paragraphs in ***bold-italic characters*** and bulleted. This paragraph is in the format that these sentences and paragraphs appear.
- Throughout this document there are words highlighted in **red**, these words refer to menu buttons and/or links.

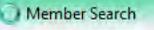
General Usage Notes and Controls

There are several items that are used throughout the manual that refer to the product. Below are some general usage guidelines.

- **Session time out.** The application times out after 20 minutes (default) of no activity to the web page (need to login again if needed). The portal application gives a warning pop-up display action after 18 minutes of no activity to the web page/server (no communication action/activity to the server, i.e. not clicking on a button/page/form). In the top right-hand

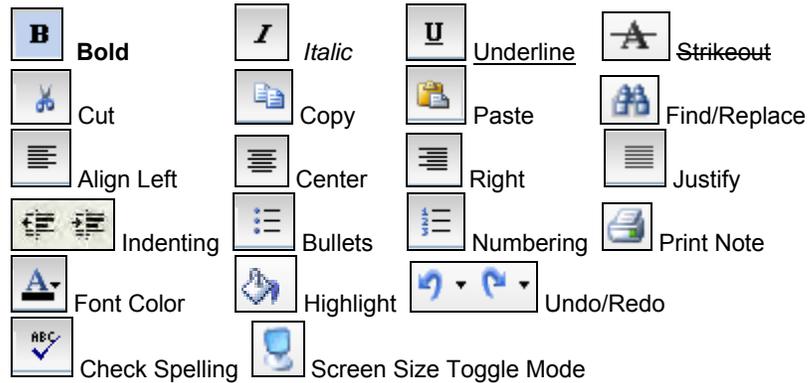
corner (banner) displays a timer (e.g. 11:13) to give the user the amount of time left before the warning pop-up appears (if an action activity is sent to the page/server, the timer resets back to 20 minutes). The warning display has a countdown timer of 1 minutes, the user needs to click on the 'OK' button to keep the session active (not logging off the user). If the 'OK' button is not click within the timer countdown, the session will expire and any data entered in a web form (e.g. wrap service plan) will be lost if not saved prior (see below for example display). If you click the 'Cancel' button, it will log you off the application. Please note, if you are in a separate window (not the main web page)(e.g. Appointment details window in the Scheduler function), the timer continues to countdown.



- **Portlets.** Portlets are individual plug-ins to ContentDistributor™ providing unique functionality. ContentDistributor™ comes with several preconfigured portlets (i.e. Quick Links, HTML) and your organization may have other custom items added for your specific needs.
- **Display resolution settings (PC workstation).** The setting for this application was developed under 1024 x 768. Optimum display resolution setting is 1024 x 768 or higher, this will reduce scrolling (i.e. horizontal bar scrolling).
- **Internet Browser & Time Zone.** Browser support is limited to Microsoft Internet Explorer 8.0 or higher, Chrome or Firefox. Other browsers may be used to access the system but are not supported and may not render to your liking or expectation. The portal keeps one time zone.
- **Server Processing.** Commands are submitted to the server on actions performed within the application. These processing commands may be quick with the action or may take some time. The processing display depends on the browser you are using. For example the processing displays in Internet Explorer:  (top browser tab) or . Please wait until the application has finished the command before clicking another actions or it may lock-up/error the application.
- **Adobe Acrobat.** To view reports that have been developed in iReports for the SOC MIS application defaults to either PDF format or Excel for the web forms. PC/Laptop must have the Acrobat Reader/Writer (it is recommended to have the latest version of Acrobat or tool to display/print the PDF format. Possible viewing issue, if viewer of the document/report does not come up: (1) the pop-up blocker maybe enabled, you will need to disable this option for viewing; (2) Acrobat may not be configured properly or is missing; (3) Earlier version of Acrobat on your PC which may have problems opening the present Acrobat file.
- **Internet Explorer – Back/Refresh** (buttons  Back / ). Initiating one of these buttons in the middle of an activity (i.e. filling out a form, etc) may lose all data entered in the application. This also does not guarantee going back to the previous location, nor refresh the data at the present location. Note if the cursor is not in a field box and the 'Backspace' key is press it will act as the Back button on Internet Explorer or other browsers.
- **Print Version of a web form.** The data entered in the web form (i.e. referral, wrap service plan, etc) must be saved (button) to the database before it will show on the printed version of the web form. The optimal printing of a form is in a PDF. To conduct other printing

options as Excel, you must first save it to your hard drive then open it up in the Excel application to print. The opening in Excel and/or HTML view is best for viewing.

- **Warning icon (⚠).** If this warning icon displays next to a field in any of the web forms (i.e. referral, intake, etc), one of two requirements are given for that field; (1) it is a required field and must have a value, or (2) invalid entry (i.e. incorrect format, incorrect value). Click on the icon to display the message of warning. This must be corrected before saving the form.
- **Text Editor Control.** Some web forms will have a Text Editor Control feature, to format the text you are entering use the buttons at the top of the control (note, some or all of the buttons below may appear for possible actions). Note, copy/cut & paste from other applications may not conform (i.e. formatting, special/unknown characters/symbols, etc) to this editor. These buttons and their functionality are:



Spell check example:



Getting Started

Connecting to SOC MIS

The user connects to the **SOC MIS** through internet access using a browser (i.e. Microsoft's Internet Explorer):

1) If available - Click the icon for **SOC MIS** or your custom icon on your desktop. Your agency IT Department may be able to setup an icon for quick access on your desktop or click the browser (i.e. Internet Explorer icon ) on your desktop, which will open up your web browser.

OR

2) Type the URL for the **SOC MIS** site (i.e. <https://> _____) in the address bar and click <Enter> button on your keyboard.

OR

3) Select a pre-saved link (from **Favorites** menu for example). The **SOC MIS** welcome page will appear (see example Figure 1a **SOC MIS login Page** (example illustration))

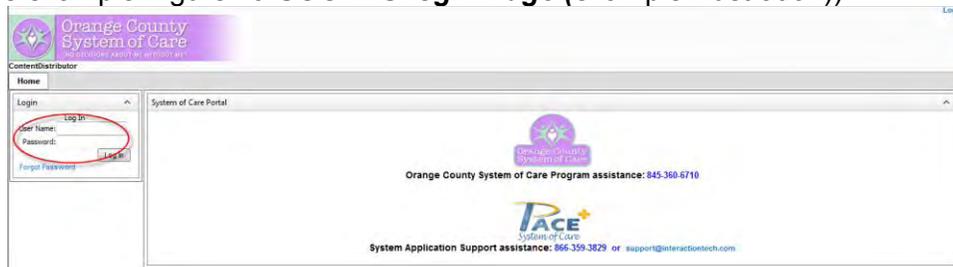


Figure 1a SOC MIS login Page (example illustration)

Logging In

SOC MIS is a rights based security system. User visibility and their accessibility are different based upon their individual logins and rights assignments. To log-in enter your assigned User Name and Password (see example Figure 1b Site Login). To add users please contact your Administrator responsible for this action. The agency Administrator will contact Interaction Information Technology to add the user profile and permission settings.

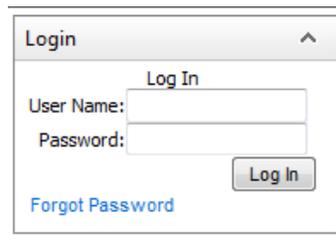


Figure 1b Site Login

Steps to Logging In

1. Type in user ID (User Name) in the **Login:** text box. (If you do not have a login ID or having problems logging in, please contact your administrator).
2. Type in password in the **Password:** text box. (password is case sensitive).
3. Click the Login button.
4. Upon success, the login will disappear. You are now logged in to **SOC MIS** and the home page appears with the available menus and functions based on your individual access rights. (See Figure 1c below).

Forgotten your password: Click on the 'Forgot Password' within the Login section (See Figure 1b1). For this to work properly, the user must have logged in prior and added a security question. See Profile section below to establish a security question.



Figure 1b1 Forgot Password

Enter your Username (login) and email address and click the 'Submit' button (it will validate within the system), if the validation is correct the security question the user added will pop-up to answer (See Figure 1b2).

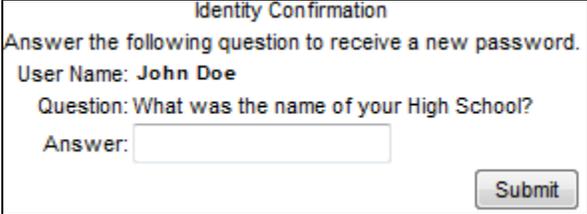


Figure 1b2 Security Question (example)

Enter the answer to the question, and submit. The user has up to 3 attempts to answer correctly, if not the application will lockout the user access. Once successful in answering the security question, a new password is emailed to the user (based on the email address in the system)(See Figure 1b3).

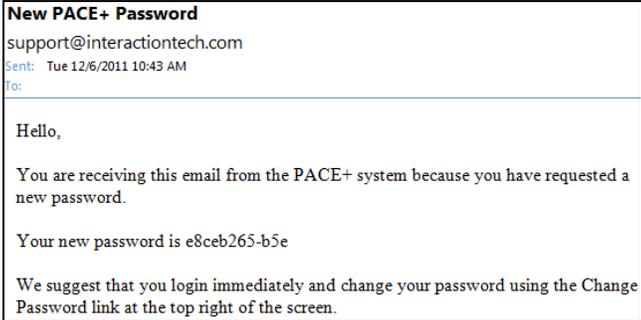


Figure 1b3 New Email Password

Use the new system generated password to login, then go to 'Change Password' (top right hand corner of the site) to change the password. Once successfully logged in, the home page of **SOC MIS** will display (See Figure 1c).



Figure 1c – Home Page

Returning To Home Page

To return to the home page at any time the user would click on ‘Home’ menu (Figure 1d):

The **Home** menu button.



Figure 1d - Main Tab Menu

Logging Off

The preferable logoff procedure is by clicking on the **Logoff** link at the top right hand side of the page (Figure 1d1). The **Logoff** link is not visible within a web form (i.e. Referral, Intake, Wrap Plan, etc).



Figure 1d1 - Logout

The screen will be returned to the Login page. If you do not see the **Logoff** link on the header menu, it is possible your session has expired. **Note:** The **Logoff** link is not visible on every page.

Profile

By clicking the **Profile** link (Figure 1d2) in the upper right hand corner of your screen will bring up the following window as shown in Figure 1e below, which will allow you to make changes to your Time Zone (drop down selection) and set your security question when you have forgotten your password. The displayed Time Zone is the present setting, if you want to change it, select from the drop down then click ‘Save Time Zone’. To set or reset your security question, click the ‘Set Password reset Question and Answer’ link which will display the entry items (See Figure 1e1). Once you have entered all the field information, click the ‘Save Question and Answer’ link or you may ‘Cancel’ out. Use a question and answer that you only know.

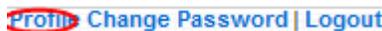


Figure 1d2 – Profile link

Display Name: **John Doe**
Time Zone: (GMT -5:00) Eastern Time (US & Canada) ▼
[Save Time Zone](#)
[Set Password reset Question and Answer](#)

Figure 1e - Profile

Security Question:
Security Answer:
Confirm Security Answer:
Enter your Password to Authorize change of your Question and answer
Password:
[Save Question and Answer](#) [Cancel](#)

Figure 1e1 – Security Question & Answer

Change Password

To change your password, click on **Change Password** (Figure 1e2) on the top right hand corner of the site. You may change your password as many times as you wish. Enter your existing Password, then your New Password (Strong password format – must be 7 characters in length and contain at least number and/or special character (@, !, etc)) and enter again to confirm the new password in 'Confirm New Password, then click 'Change Password' button (see Figure 1e3). When you login the next time, you will need to put in the new password.

[Profile](#) [Change Password](#) | [Logout](#)

Figure 1e2 – Change Password link

Change Your Password
Password:
New Password:
Confirm New Password:

Figure 1e3 – Change Password

Menus

Menus are a parent/child relation menu (see Figure 1f below). Access to menus depends on user rights. It allows for continuous sub-level menus making it easier for the user to quickly look-up and navigate through the site. When hovering your mouse pointer over the menu(s) may expand additional menus.

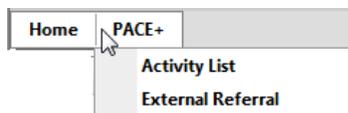


Figure 1f –Menu display (example)

Pages

Pages are generally arranged in logical entities, such as Links, Announcement, etc. This is based on your organization’s configuration. See Figure 1g for **SOC MIS** example home page.

For example, on the left side of the page (aka known as left pane) has a function (portlet) called ‘Links’. The Links function gives users the ability to open the specified site in a separate internet window. The site links gives users the ability to access commonly used sites. Sites can be added, contact your administrator.



Figure 1g – Home Page layout example

Calendar Control

The application has incorporated a date calendar field control feature in some of the web forms to help users in entering a date (see Figure 1h).



Figure 1h – Date control field



Example without control feature

The user may either type in the date (mm/dd/yyyy) or use the date calendar control feature (Figure 1h1).



Figure 1h1 – Calendar monthly view

Navigation Tools & Help: The user may use quick keys to enter dates (Figure 1h2)(cursor needs to be in the date field box). Figure 1h2 displays the quick keys for the date field. For example, if you type in “t” in the date field, it will automatically enter today’s date and while the cursor is in the date field box, you may change the date (i.e. the up arrow (↑) on keyboard will increase the date by one day, etc).



Today	T
Calendar	C
<hr/>	
Previous Day	Down
Next Day	Up
Previous Month	Pagedown
Next Month	Pageup
Previous Year	
Next Year	

Figure 1h2