

CareManager Pro

Initial Setup Steps for Review / Demo

In order to experience the benefits of *CareManager Pro's* features set your Preferences, defaults and identifiers to work with the program and apply realistic entries.



1 - After install a "Desktop Shortcut" will appear. Click Shortcut to open Log-on

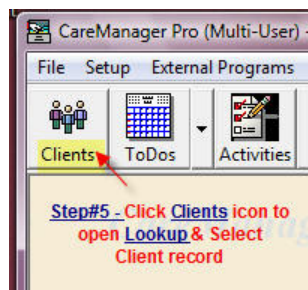
2 - Enter User Name and Password (Password is Case-Sensitive) For demo period **simply enter your "First"** name for both User Name and Password. Then Click "Continue" button to Open Setup User window)

A screenshot of the "Step#1: Welcome To CareManager Pro" login window. It has fields for "User Name:", "Your Password:", and "Log On To:" (set to DEMO). There are "Continue" and "Exit" buttons. Red arrows point to the fields with text: "Type your 'First' Name as User and for Password. Passwords are 'case-sensitive'" and "Click 'Continue' button". A "Login Table" tab is at the bottom left.

3 - Use Tab key to open data fields - Type first and last name as displayed and re-enter Password (again case-sensitive) in the Confirm field (below-right corner) to match

4 - Click "**Save**" button

A screenshot of the "Setup User" window. At the top, "User ID:" is set to "Mary". Below are tabs: "General", "Security", "Client Access", "Remote". The "General" tab is active, showing "Demographic", "Options", and "Client Data" sub-tabs. The "Demographic" sub-tab is active, showing fields for "First:" (Mary), "Last:" (Smith), "Address:", "City:", "State:", "Zip:", "Phone:", "Cell:", "Role:", and "Note:". Below these are "Password" fields: "Current:", "New:", and "Confirm:". A "Reset Password" button is between "Current" and "New". At the bottom are "Save", "Cancel", and "Delete" buttons. Red arrows point to the "First" and "Last" fields with text: "Type 'First and Last Name'". Another arrow points to the "Confirm" password field with text: "Repeat - Type Password in 'Confirm' field". A third arrow points to the "Save" button with text: "Step#4 - Click 'Save' button". A note says "Password appears in New field as 'Asterisks'" and "Setup User window opens and User Name / ID appears".



5 – Click **Clients icon** to open client Lookup to select record to open

Client Lookup By Last Name

ID	Case ID	First Name	Middle Name	Last Name	Birth Date	SS #	Phone	Active
27		Admin		Admin				Yes
2358		Jane		Fondalock			(407) 555-5555	Yes
2359		Marilyn		Monrovia				Yes
1		John	A	Waynescoat	01/31/2011	094-54-4600	(407) 657-2345	Yes

Step #6 - Highlight to select Client

Step #7 - Click OK button

☐ Include Removed Records

Last Name-->

Advanced OK Cancel New Client

6 – John Waynescoat demo case record opens displaying all modules (tabs) – Click all tabs, icons, buttons, etc to explore modules data fields. You can add new, modify or delete data

Client Data For: Waynescoat, John

Medications | Medical History Check List | General Contacts | Case Notes | Care Plan | Assessments | Personal Information | Insurances | Client Contacts | Physicians | Office Visits | Hospitalizations

Demographic | Employers | Allergies | Family Med. History | Immunizations | Assist. Items / Cond. / Diag. | Billing | Authorizations | Groups

Name (F/M/L): John A Waynescoat SS #: 094-54-4600

Address 1: 4245 Maple Ave Address 2: Birth Date: 01/31/2011

City: Your City State: NY Zip: 11000 Birth Place: Brooklyn, New York

Home Phone: (407) 657-2345 Alt Phone: (407) 656-1234 CELL Gender: M Ethnicity: White

Resp Party ID: JWaynesJr Spouse: Mary Sue Johnso Marrie Blood Type: AB+ Religion: Christian

Service Information: ☒ Veteran Branch: US Army Discharged: 10/11/1964 Height: 6'1" Weight: 210

Date Of Death: / /

Case Information: Case ID: Category: Care Management Referral Source ID: Welby

Opened: 10/01/2009 Closed: / / Reason Closed:

Save Close Clear Fields Print Cancel Inactivate

7 - Call Support at (888) 669-9697 Ext 3 for a brief tutorial, Q&A and setup of custom preferences and defaults, users, providers, activity / billing rates and descriptions , etc to make your review relistic to your requirements.

There is no obligation and the software will run for thirty (30) days from initial logon for evaluation to make an informed purchase decision. If you have no interest go to your PC's Control Panel - Add and Remove Programs and "remove"