



Vision Computer Programming Services, Inc.

801 2nd St S Suite A Safety Harbor, FL 34695

888-425-6964

email@visioncps.com

www.visioncps.com

Guidance, Accidents & Mentoring

Document Guidance, Accidents & Mentoring for your Members:

1. From the Main Menu, click *Members* and navigate to the member for which you wish to add an incident report.
2. Select the Guidance/Accidents/Mentoring tab at the top of the screen.
3. Select 'Guidance' or 'Accident' or 'Mentoring' on the top right of the screen.
4. Click the *Add (Guidance/Accidents/Mentoring) Record* button on the bottom left of the screen.
5. Select the staff person reporting the incident from the drop down list next to Reported By: NOTE: Staff must be entered in the Staff/Volunteer section in order to show in this list. Optionally you can check the Show Active Staff/Volunteers Only box to view only current staff.
6. Change the Date if necessary.
7. Select a Category. If you need to add a new Category, just type it in. If you add a new Category, when you move on you will be prompted to confirm your new Category. Click 'Yes' if you wish to add it to the list.
8. Fill in Guidance & Outcome for a Guidance incident or Accident & Follow-up for an accident or Details & Duration for a mentoring session.
9. Optionally you can click *Copy Record to a Different Member* if another member was involved in the incident and add the same record to other members in the system.
10. Click the *Guidance Hardcopy* button at the bottom.
 - a. Choose the date range, staff, sorting
 - b. Choose *Preview* or *Print* or *Send Email*
 - c. NOTE the person you want to send the email to MUST be marked as Primary Contact or Parent Guardian and have an email that is marked Preferred on the Contacts tab.
 - d. Choose to send from my e-mail account or via SMTP.
 - e. Modify the Subject and Message to fit your needs.
 - f. Click *Send Now* at the bottom.
11. Click the 'Close' button on the bottom right of the screen when you are finished documenting the incident.

Document Guidance & Accidents for your Staff/Volunteers:

1. From the Main Menu, click *Staff/Volunteers* and navigate to the person for which you wish to add an incident report.
2. Select the Guidance tab at the top of the screen.
3. Select 'Guidance' or 'Accident' on the top right of the screen.
4. Click the 'Add (Guidance/Accident) Record' button on the bottom left of the screen.
5. Select the staff person reporting the incident from the drop down list next to Reported By: NOTE: Staff must be entered in the Staff/Volunteer section in order to show in this list. Optionally you can check the Show Active Staff/Volunteers Only box to view only current staff.
6. Change the Date if necessary.
7. Select a Category. If you need to add a new Category, just type it in. If you add a new Category, when you move on you will be prompted to confirm your new Category. Click 'Yes' if you wish to add it to the list.
8. Fill in Guidance & Outcome for a Guidance incident or Accident & Follow-up for an accident.
9. Click the *Print Guidance Hardcopy* button at the bottom.
 - a. Choose the date range, staff, sorting
 - b. Choose *Preview* or *Print* or *Send Email*
 - c. NOTE the person you want to send the email to MUST be marked as Primary Contact or Parent Guardian and have an email that is marked Preferred on the Contacts tab.
 - d. Choose to send from my e-mail account or via SMTP.
 - e. Modify the Subject and Message to fit your needs.
 - f. Click *Send Now* at the bottom.
10. Click the 'Close' button on the bottom right of the screen when you are finished documenting the incident.

Run Guidance/Accident Reports for Members:

1. Click *Reports* from the Main Menu.
2. Select the Members 2 tab at the top of the screen.
3. Click the *Guidance/Accident Report* button.
4. Select the Members you wish to appear on the report using the Universal Selection Engine (Click the blue question mark button on the bottom of the screen if you need help using the U.S.E.), and then click the *Continue* button at the bottom of the screen.
5. Select your Report Format.
6. Select To Show 'Guidance', 'Accidents' or 'Total of Both' on the top of the screen. (Choices available depend on the Report Format chosen. No choices are available for the Summary Report.)
7. You may limit the report to a particular category by selecting it in the Categories list. (You can select multiple categories by holding down the Ctrl key when you click each one, or Shift-clicking a contiguous range.)
8. Select the date range(s) needed.
9. For a Detail Report, you may also narrow the report to incidents reported by a specific person, and/or modify the Sort order.
10. You also have the option to enter a Report Subtitle.
11. Click the *Preview* or *Print* or *Export to Excel* button at the bottom left of the screen.

Run Mentoring Reports for Members:

1. *Reports* the Main Menu.
2. Select the Members 3 tab at the top of the screen.
3. Click the *Mentoring Reports* button.
4. Select the Members you wish to appear on the report using the Universal Selection Engine (Click the blue question mark button on the bottom of the screen if you need help using the U.S.E.), and then click the 'Continue' button at the bottom of the screen.
5. Select your Report Format.
6. Select the date range needed.
7. Use the Mentor Selection section to choose All Mentors or limit the report to a Specific Mentor.
8. You may limit the report to a particular category by selecting it in the Categories list. (You can select multiple categories by holding down the Ctrl key when you click each one, or Shift-clicking a contiguous range.)
9. For a Detail Report you can modify the Sort order. Double-click a field to toggle between Ascending and Descending order. Use the arrow buttons to move the selected field up or down the list.
10. A Category Summary report displays a count of the mentoring sessions and the totals of the mentoring session durations for each Category. Checking Mentoring Subtotals will subtotal each category's numbers by Mentor.
11. You also have the option to enter a report subtitle.
12. Click the *Preview* or *Print* or *Export to Excel* button at the bottom left of the screen.

Run Guidance/Accident Reports for Staff:

1. *Reports* the Main Menu.
2. Select the Staff tab at the top of the screen.
3. Click the *Staff Guidance/Accident Report* button.
4. Select To Show 'Guidance' or 'Accidents' on the top of the screen.
5. Select the date range needed.
6. Use the Reported By section to choose All Staff/Volunteers or limit the report to incidents reported by a specific person.
7. You may limit the report to a particular category by selecting it in the Categories list. (You can select multiple categories by holding down the Ctrl key when you click each one, or Shift-clicking a contiguous range.)
8. Use the Sort By section to modify the sort order.
9. Use the Reported On section to narrow the report to incidents concerning Staff Only or Volunteers Only, or to include Both.
10. You also have the option to enter a report subtitle.
11. Click the *Preview* or *Print* or *Export to Excel* button at the bottom left of the screen.