DAD 2.0 Desktop Intro Transcript

Matt Hayden: Hello my name is Matt Hayden and I'll be walking through the demonstration of the DAD 2.0 client interface. That is, the DAD acronym is short for the Disability Advocacy Database and this is 2.0 because this is our second version. The screens I'll be using today for our demonstration are live on our beta server. The system is not live as of this training video. We will be logging in and today going over the screens and the navigation to create a client service request and project and highlight some of the changes from our last version. The first thing that you'll notice is different is when logging in, you have an advocacy group to select from, not just the user name and password. The advocacy group selection will remember the last advocacy group you've selected on the computer you last log in with. So if I were to change computers, I would have to select my advocacy group again, but every time I logged into that particular PC or MacIntosh, I would have the particular advocacy groups say. We go ahead and log in. Again logging in brings us to the DAD control panel. This function is in the similar way they did in 1.0. It maintains your authentication and it is a holding point for where to navigate elsewhere in the application. One item that is not here on the control panel that is current in 1.0 is the timekeeper link. It has been completely integrated into the desktop and is no longer a separate functionality. So there is only desktop, report generator, administration, and preferences. In this particular walk through we will be doing today on the beta server does have full rights and full privileges so that when you are utilizing your system back in your office, if there's a setting you do not see, it may be permission related to where you do not have availability of that service.

Whenever logging in for the first time, the first item of business is to select the preferences. The preferences in DAD 2.0 are much more robust than they were in 1.0 to the extent and I'm going to go ahead and maximize this window, to the extent that we have more options to choose from. The first step obviously is to select mouse acceleration on. By default it is triggered to off. That setting is in place so that if someone using a screen reader or a keyboard friendly assistive technology device, native support would be built in. For those of us that are using mice to navigate the screen, you would go ahead and immediately select that to on. Just a footnote on preferences, when you select the preferences, they associate with your log in, not with the computer in which you set those preferences on. So if we were to move to another computer, we would not have to worry about having to re-set the mouse acceleration to on, as it will follow our log in and we will not have to change it until we need to change it again.

The next column is display report generator column header. This is just some options from within the report generator which are a little more advanced. This is just a navigation piece, so this is where you would find this setting. Display long RG text field. Use pop ups with screen readers. Search results count. You can set up how many search results you should receive per page before having to select next. The print preview font size. And this is for a user, not for your whole office. So if you were to select 8 and your co-worker would select 12, it would maintain it equally and differently for both of you. Display basic desktop search in the desktop. Display basic project search in the desktop. Project search is new for this particular version. This is going to be the ability to search for projects by name or by funding source or a couple other criteria. Rather than just to pick them from the list. Display primary clients on desktop. Associated clients on desktop and team clients on desktop. The three categories you'll notice for the rest of these selections is primary, associated, and team. In DAD 2.0 we have moved past what DAD 1.0 capabilities were to where you had the option of a primary employee, a primary supervisor, and a team association. In DAD 2.0 you have the ability to assign a primary employee. You can also assign additional primary roles. And then you get to stipulate what type of roles you would like your agency to have on a service request, client, or project basis and associate up to every staff member in the agency with a particular service request, client, or project. So there is the way to filter that on the desktop. By default you're set to have just your primary client service request and projects on your desktop. But you can also have them show the associated in team as well. Display the time entries on your desktop and you have the option to display time entries for today or however many increments you like and either a grid or a list. Once you've completed entering your preferences, you select save and done to return to the control panel.

From the control panel we have the option to select open desktop. Open desktop is going to be what….our desktop is going to be where all of our client management functions exist and our project management functions exist. We have all of our client, service requests, and project entries from this particular session. As an overview, again, in DAD 2.0 just as in DAD 1.0, when creating a client service request and project, the logic still stands that when the interaction is between an individual and your agency, that individual is configured in the system as a client and all of the services provided are configured as service requests. If you are doing work on behalf of a group of individuals or anything administrative or anything that has a class action or an education in training activity, those are projects. And we'll touch on projects shortly, but just recognize that when providing advocacy services on any continuum of the services that P&A's and client assistant programs provide that the literal definition of a client is an individual that you're reporting services to and a service request is just a recording of those services. Starting at the top, we have the identification that we're on the desktop. We have our desktop button, which brings us home to the desktop. We have client, which will take us to the last viewed client screen. Service request, which will take us to our last viewed service request. Project, which will take us to our last new project and time, which will take us to the ability to enter and edit our time entries that we've made. You have the ability to enter time to either a service request or a project in DAD. A change from DAD 2.0 to 1.0, in DAD 1.0 you can click on the last service request and that would navigate to the last service request you had open and then you could click on client and it would take you to the last client you had open. Those could be separate. You could have had a service request from one client open and a client from another as your most recent or active client. In DAD 2.0 when you open a service request, the most recent client becomes the client for that service request so there isn't any mix ups when navigating using this toolbar. The drop down menu referred to are the actions drop down menu, highlights all the options available from this page including the views, the tasks, and any support options.

And then navigating down the page we have our basic search, which I enabled through my preferences, which is able to be hidden should you need. A list of all primary clients, primary service requests, primary projects, and time. I don't have any in here currently because we’re working on the beta module, but we’ll go ahead and put some in. The first step in creating a client in the system is to search to see if they already exist. Let me myself for today as an example. We have a new solution also with our search engine that we have the ability to search on any criteria or all criteria. Where we can be specific or a little….or give ourselves more options when searching. We also have a degree of sounds like between weak, medium, and strong matches to identify if we have individuals in there with alternate spelling. This client is already in the system. Now the individual that may be in the system may be due to a role that they have with other particular items found in DAD 2.0. Go ahead and stop now and describe the difference between the search on the desktop in DAD 1.0 and the search on the desktop in DAD 2.0. DAD 1.0 searched client names only. When you ran a search from DAD 1.0 the results of clients and that was it. In DAD 2.0 you’re not only searching for clients, you’re searching adversaries, referrers, callers, primary contacts, guardians, and clients. So any contact that is in DAD 2.0 should you search by that name, will pull up. This was done to not serve as a confidential….excuse me….a conflict check, but more of a red flag should someone come up to identify how up there are in the system. For example, I had the ability to view connections for this particular individual and view what they are in my system. I can view that the only connections they have, is that they happen to be a client in the system without any service request or project. So it doesn’t serve as a particular conflict, but they may have been an adversary on a service request. They may have been a referrer for another client. This is where we’re able to view what that particular individual connections are within the system.

We’ll go ahead and compromise a new search. Try another name just to pull up an entry that has no result. Then we go ahead and select create new client. And the reason why Matt Hayden showed up again, was because I had it match on any criteria and the criteria was Hayden is the last name or Matt is the first name. So…oh excuse me or William is the first name. We come to our new client information page, which is very similar to the way our old DAD 1.0 system functioned. We have client number, which is your cross referencing information to match the following folder or filing system you may have outside of the DAD system. The DAD system still creates a client ID, which is going to be a sequential number assigned universally to each item created in DAD. This same logic exists for projects and service requests. The first step is putting in the first and last name, the organization they may be part of, their title, social security number if available, gender, and just to highlight if they are more options in DAD 1.0 than there are in DAD 1.0, there actually was a need in several of our agencies to identify individuals being served as more than just male or female and other didn't necessarily cover it. So we actually have given the administrator options to add to the gender categories. So that's why you see more options listed there. Ethnicity is still recorded the same as in DAD 1.0. You have to document not only the race of an individual, but also its ethnicity. It's kind of a two stage question asked with one response and the preferred language. Date of birth, one of the additions we've been able to pull off is not only do you have the ability to enter in a date of birth just like we did before and you have the ability to type in an age and it will estimate it. You also have the ability to pull down a calendar and to navigate to that particular date. Upon entering age, check off estimated field and it will estimate the birth date. Go ahead and put in address and any other information. The only information that's required when creating a client is in fact the first and last name. That particular information is being the only required information, allows you move to forward should you have something such as an I&R. New to DAD 2.0 is a series of warnings that will issue if you leave information blank. For example, had I left gender as unknown or not selected and ethnicity is not selected or an age is not entered, I would have received a notification saying that I had left that information blank.

Moving down the list we have a new additional also to DAD 2.0 is the selection of which phone number is the primary phone to use. Let me go ahead and put in a work number here and select the primary phone number as work phone so that it lists it there. We have the living arrangement also in the client section. One of the issues we ran into with DAD 1.0 is you actually have some of the reports that ask for a living arrangement per service count and then you have other reports that ask for living arrangement per individual counts. So what we ended up doing is putting it in both places and allowing you to update the client from the service request, which we'll touch on shortly. Just recognize that the living arrangement is selected from the client and is updated from the service request also. We have location and education level and if the individual is deceased, we have new options to select whether or not they are deceased and their date. Something to touch on also, the difference between DAD 1.0 and DAD 2.0 is that in DAD 1.0 after you click next, after the first create new client window, that created the client. If you used the back button and re-navigated to this screen, you would have created two. In DAD 2.0 the client is created once you finish the client creation process. So if you were to close this window or to hit cancel, it would not save any of the settings you previously selected. So canceling out of the create new client or service request or project wizard will cancel the creation of that item. It will….in an effort to alleviate duplication. Selecting disabilities is just the same as it was in 1.0. You actually have to select all of the disabilities that an individual will inform you of and that will allow you to select from that shorter list the primary disability as it applies to the service request for which you're creating. One thing that has changed is the default of not selected. Should I choose anything else. We'll deselect and become grayed out. If I were to deselect all my other selections, the default would return. So unlike DAD 1.0 where you had to deselect unknown, that is taken out and made an automatic function in DAD 2.0. Selecting accommodations similarly the way DAD 1.0 functions. You just select any accommodation is that is necessary to interact with the client. Accommodations are not what the individual is trying to receive through services from your office. This is just what is required to do business with this individual. Primary contact. We have the ability to search for a contact that may already be in the system. But we have the ability to add the individual as the client. So I'm going to go ahead and use the fact that that individual is already in the system search and now I can pick up on this particular individual or I can use the client as a contact. Now this is the client showing right here. And so I'm going to go ahead and say select Mike Hayden the contact here and import that information. This client is now also the primary contact. If I were to edit this information, it would also edit the organization, address, home phone, work phone, alt phone, and e-mail for this particular individual anywhere else they're used in the system. So there is flexibility and control here, but there is also a warning that if you were to change the address of a contact, you were changing it globally in the system. If I decide this isn't the correct individual I have the ability to go back and search for an additional contact or just to establish the relationship to the client, put in any additional information, and continue on. Upon completing the client, I have the ability to start a new service request or just to un-check that box and view the client detail window.

The detailed view contains all of the items we've already created. It goes through and highlights all the service requests, contacts, and any of the notes that are associated with that particular individual. The drop down menu, we see we have the ability to navigate back to edit that client, edit the disability list. Any of the items we created with that particular wizard. The option called local data is for any local questions that may be created. We have the ability to create a note on the client. We have the ability to create a new client, service request, quick I&R, or to delete this client from here. One thing to note, I'm going to go ahead and select edit the client and I am going to adjust the mailing address for this particular individual and I'm going to just change the suite number from 211 to 200 and select save. DAD 2.0 when making changes to the demographic information of the client automatically creates a note that highlights the change from my address to the new address. So every time there is a change made from any old value to a new value found within the address and phone number of that particular client. It's backed up in the form of a note automatically done for you. If I were to go back and change it again from 200 back to 211 it would create a new note. Just a historical time stamping of those changes. From the client window we'll go ahead and select create new service to document the efforts towards that particular client. The first screen we're prompted with is the client objective. This is where we're trying to provide the service to this individual. I'm going to go ahead and misspell "issue" just to use the spell check. The upgraded spell check gives you an option to either ignore the spelling or to change it to the suggested spelling. And it returns you back to your window. Eligibility is a window that you get to create on your own. I've just done some sample information in there. This is populated by your local DAD administrator as to what items have been established to document this particular individual as eligible for services within your office. Again, you don't have to deselect the default. It deselects for you. We went ahead and selected case service. The difference in the service request type from DAD 1.0 to DAD 2.0, in DAD 1.0 you had to know which service request type was a case and which one wasn't. In DAD 2.0 you have a service request type that is a case service or a non case service. So we've eliminated a good bit of the guess work there. I'm going to go ahead and select case service. I could have easily selected I&R or non case service, not an I&R at the same time. And for funding source I'm going to go ahead and select PABSS. Select next. Because I selected a service request type that was case and because I selected a funding source that was PABSS, several of the options that are available on this screen are funding source specific. For example, if I hadn't selected PABSS, I wouldn't be prompted for the client's age and intake. That's a question that's specific to the PABSS program to document people that may age throughout the process out of the Social Security program. So if somewhere were to come in at 64 and have a 65th birthday while they're working with you on their advocacy efforts, this documents that when you first started to serve that individual they were of the appropriate eligible age.

Client beneficiary status is also another data element that's being triggered based on the funding source. We select the county. Should we select a different county we have the option to update that county and the client record. Problem location. We have the ability to select again….I'm going to select urban. If I want to update that in the client record to make sure that's the most recent, I just select that box also and then living arrangement has the same functionality. Rather than have the long list of facilities like we have in DAD 1.0, DAD 2.0 we have a category called facility types. This is where you select the type of facility for which you're looking for and it then breaks down the list into a smaller more manageable list. So if you were an agency that had 100-200 facilities populated in here, now you can categorize them by the type of facility and have several smaller much more manageable lists. Primary disability, you'll now notice, has mental illness and speech impairment. I also checked off a couple other disabilities just to highlight the fact that these particular primary disabilities are specific to the PABSS program. Had I not checked off PABSS eligible primary disabilities, I would not have a disability to choose from here. I would have to go back and amend my client record after creating a service request to highlight those _____. You select a priority. From that priority we then select the objective that it falls under. Another funding source specific item is the particular question on the PPR that is the source of concern, why this individual came to your office. You'll notice further description is grayed out. Should source of concern prompted for additional information. Should I have selected other, I could then enter in further description here. If you select an item that is requiring further description, it will not let you navigate past that screen without completing that information. Select from the problem list employment and then from the sub problem list, wage and hour issues. These are all specific to the funding source that is PABSS and by selecting a different particular problem area I get a new list of sub problem areas so this is going to be automatic based on what you selected a problem. You're going to have the eligible sub problems that are available. Again, if you select a sub problem that requires a description, the further description will be required of you. You select a team. These happen to be the teams that are created for demonstration purposes. It could be any team that you have created. DAD 2.0 does require that you have at least one team created, even if your advocacy group or office do not utilize the team functionality. Primary employee. And we select next. Similarly in DAD 1.0 we have the caller information. Go ahead and search for an individual. I'll just make up John Doe. Search. Not found. So I'm going to go ahead and select add new contact. Enter in John Doe's information. Hit save. I have the ability to edit this client information or to select a different contact at this point. I then highlight the relationship and hit next. I then I have the adversary, that's the individual that we're wishing to get the service….the individual is coming to us resolved or the issue resolved from. Then go ahead and just skip that one for now. And I had the option to prepare the service request for closing or just select finish and go to the service request detail. From the service request detail window, we are able to see all the items we put into the service request so far. Just to highlight a sample of how to generate an error in the system. I'm going to go ahead and edit the service request and I'm going to change the…actually……go ahead and select problem and sub problem….I'm going to change back to its default of not selected. Hit save. Now I get a warning at the top of my service request that says that my problem is currently set to not selective and the sub problem area is set to not selected. These are something you need to change before you're able to close this particular service request. That's just because it's flagged as the default. Just understand that should you have a warning like that, the first thing you would do is to select edit problem and sub problem and then you can just change it back or change it to anything that is appropriate. Alright?

Moving on we have, again, assigned employees, contacts that are associated with this particular service request. You have the ability to view the details of that contact, edit it or delete it. We have associated projects in DAD 2.0. You have the ability to associate a project with a service request. All that means is you have the ability to view any associated projects from the service request and vice versa. You have the ability to jump to those projects and jump to those service requests from vice versa. The last five notes, the last five time entries. Let's say for example we wanted to add an additional assigned employee. It says display service request employees and new employee assignments. We can pick any employee from our advocacy group. We can pick whatever assignment type we want them to have and select save. Now for my list for this demonstration I just have primary and associated and supervisor. You can create as many assignment types as you like and add as many employees as you like. The primary role is required so that you have to have at least one employee as the primary. Should I add a new employee as a primary, I also have the ability to add additional and to edit additional information on the particular employees associated with the service request. So just to re-speak that, you have to have at least one individual in the primary role. When you have two individuals in the primary role, you can choose to edit one to be another role within the particular service request such as supervisor. From the view of the assigned employees, we can just jump back to the service request detail window and then it will show all of our changes.

Just to highlight the difference in the grids that are shown in DAD 2.0, an example on the assigned employee table you'll notice there's a red X on a grid, which is to hide particular columns. So at any given time, we could hide the particular assignment type and then we could bring it back by selecting the show all columns options. So you have a way to manipulate these particular columns. You also have the way to sort. We could sort by assignment type and secondly by employee. And it will reverse. If you just keep clicking on the different sorts, they will sort as many as the items as you have. For example we have four items here. So we could have a four way sort. And this is also new for DAD 2.0. Once we've entered our information into the system for the services for which we've provided for this particular individual, we then would select prepare service requests for closing to document this individual…finalize the efforts we have done. We would be closing it out. The first step is to select the proposed close date. This was put in place strictly for the process of closing service requests close to a fiscal year end date. In the past, you had to close the service request and then change the close date to match the actual date of closure. In this instance you put the date in first and then it gives you the appropriate data element should there be a change from fiscal year to fiscal year. Go ahead and hit save and answer closing data. I then have…to outline the services that were provided, the intervention strategy, the outcome statement, outcome narrative, the reason for closing, and whether or not a satisfaction survey was provided. I'm going to go ahead and put in met with lawyer. Resolved situation. Select intervention strategy. We'll just go with negotiation. Outcome statement is going to be obtained an increase in salary. I'm just selecting items from the list that pertain to the particular service. There is no actual service request for documenting. This is just for demo purposes. And then for the outcome we'll just leave that one blank and reason for closing, we'll leave….we'll check satisfaction survey provided and say save and validate for closing.

The first thing we'll notice is that we did not put in reason for closing service request. It is currently set to the default. It must be changed in order to close the service request. By selecting fixed, it's going to return us to that window and we then can select anything from the drop down. All issues resolved in client's favor and I'll go ahead and put in an outcome and validate for closing. Now that there's no errors and validation is successful, we have the option to close. If we get to this point, we also have the ability to restrict who can and can't close a service request. You can allow a user to get to the point where they are all the way to validation successful and then they can only select display service request and someone else with a close permission can come in and approve their activities and formally close that service request. I'm going to go in and select display service request just to demonstrate where it navigates to. It just brings you right back to the service request detail and by selecting prepare to close again, you jump right back into that process.

Of the options from the drop down view for a service request, we have the ability to add the date open, the type of service request, the funding source, primary disability, priorities and objectives, problem and sub problems, service requests which is more of the general information. The service request local data, which are any local data elements that you would create for this particular service. Create a new note, record time, prepare for closing, track publications. When selecting track publications, as in DAD 1.0 with projects, you actually have a quantity you put in and now we have the ability to filter also on dates and you can put in a date entry or for the dissemination of this publication. You have the ability to move the service request to another client, to create a new service request, to delete the existing service request, to answer the closing data, validate and close the service request, or to jump back to the search. When recording time on this particular service request, just like with DAD 1.0 you have an entry for an individual. You have the action, which is just a shortcut or short hand description, the amount of time I have my advocacy group configured in minutes. You have it set it to tenths of an hour or quarters of an hour and it will show you the amount of time you have recorded so far for the day. Now if we were to go back and select record time again, we would see that we have 30 minutes so far recorded for today. And we also would see from within the body of the service request a time entry for the particular service request by Matt Hayden and the date and the time and any notes that were made. For example, if we were to change the funding source at this point due to the fact that we have funding source specific options and things such as SSI beneficiary status and things like that, are embedded in the particular service request. Let’s say for example we wanted to switch to a PAIMI funded service request, the fund specific item that are shown on this screen are the items that you will have to re-answer in order to close that particular service request. So we get a pop up window that we can print that shows what we did have selected as a PABSS funded service request that we do not have selected now as a PAIMI funded service request. So we will have to go back in now that we have changed it and selected the primary disability, the sub problem, the intervention strategy, outcome statement, and the like just because they have been shifted based on the funding source in which we chose. We can either just close this window, print this window, or leave it open just to know what we have selected for. I'm going to in and edit this service and make sure we have everything selected. The first warning says primary disability has not been entered. I'm going to go ahead and select edit primary disability. Select mental illness and hit save. Sub problem has not been selected and it's sub problem and problem. And then we can go back to prepare service request closing. Select the closing date. And the items we have put in the past maintain, we just have to now select from the different lists of intervention strategies that are available to us. The outcome statement and the reason for closing. We don't have an objective entered into the system, so I'm going to go ahead and hit fix. Select a priority, the objective. Because you can't move forward without having a priority to tie it to. Validation is now successful. I'm going to select close. Now the service request is closed.

Should, for example, we have closed that in error, we always had the ability to re-open that service request, but you also noticed in the task drop down, you no longer have the ability to edit any of the items from the service request. So once you have closed the service request, your options are limited to re-opening it or to create a new service request. Just touching on the changes for funding sources, it is recommended that when you are recording time and working in an environment in which you are billing based on the activities in which you're recording in DAD, if an individual is recording time towards a PABSS service request, it is not recommended that that individual then shift that service request to PAIMI. It would be more recommended that the….excuse me, it would be a recommended action to just close the PABSS service request and to open a new PAIMI service request for that client and then to document their time there. That would allow the…the fiscal documentation that services were provided under PABSS dollars and then cease and then services were provided under the PAIMI and continued forward as PAIMI dollars. As for your counts, at the end of the year your reports will only reflect one individual per funding source. It won't double up the number of service requests you have by splitting that across.

I'm going to select create new project. We could have gotten to create new projects several different ways. I could have navigated via the desktop to the display project search. I could have searched for an existing project. Or I can just click on the word project and it'll take me to my last access project. I don't have a project yet in the system. So I'm getting notification that I haven't accessed a project yet. Go ahead and select create new projects from the drop down. Opening date for the project. And then select the project type. I'm going to go ahead and create an education in training project just to highlight, but each one of these project types has different fields that are relative to that particular type. For example, if we were to have selected class action, it would have different data elements than an education in training activity. I'm going to go ahead and select education and training activity and hit next. I'm going to select the funds that pertain to that particular training activity. This is all very similar to the way DAD 1.0 functioned. In DAD 2.0 they have the same restriction that all the funds have to equal 100%. The only difference is now that the error message that will show will actually tell you that you have 99 instead of 100 and to please change one of them. Objectives from DAD 1.0 to DAD 2.0 in service requests, you still are 1:1, which means you can only have one objective of a priority selected for a particular service request and only one funding source and projects in DAD 1.0. You could have multiple funding sources, but you couldn't have multiple priorities. In DAD 2.0 you can stipulate any number of priorities that tie back to the funding sources you've selected. So you can have multiple priorities as well.

The first step is giving this a project number just like with service requests and clients. DAD generates a project ID, the project number is just a cross reference for your office system should you have an additional numbering system. You have to give the project a name. We'll go ahead and call it pet project. Project description, project objective, assign it to a team, training purpose. Again we have the spell check functionality. Just hit next to navigate. Again, just like before, the project isn't created till you hit finish. Just remember do not use the forward and back keys of your browser. Always navigate using the previous, next, or cancel options. We then have the training methods for this particular one. These are put in by your local administrator. So you have the ability to select which method you have to chose from. And then we have prepare project proposing or just to view the details. Now for the most part, you're going to select finish and display the project detail, because the theory is that you would set up a project for every new training that you provide. I'm getting warnings that I didn't enter in a project description or project objective, so I'm going to go back and select edit project. Put in some simple text. And our errors go away. So basically you're required to enter in your description and your objective to get rid of warnings that may show you that you don't have information in there. Okay so we've created our project, we've assigned our employees. Just like with service requests, we can select from the drop down menu display project employees and then we can add as many employees as we want to this particular project. We can edit their role at any time. Again, we have you as the employees, any contacts that were created to be shown with this project. Any associated service requests. Five notes, last five time entries. Once we have actually finished our training, we would then come in and close the particular project by selecting prepare project for closing. Select the date. Put in the outcome. List any collaborators. Description of the collaboration. Number of individuals trained. Efforts towards un-served and underserved populations. Description of attendees. Then save and validate for closing. Again, I got a validation successful. If I were to have left any of that information off, I would have gotten an error and been prompted to fix it. Go ahead and select close. And the project is closed. Now when at the end of year I now have the ability to review all of my trainings and to run a report that will show me by funding source how many trainings I provided, how many people attended those trainings, and narrative support for responding to the PPR questions. This project will also be located as my most recent project that I've viewed and also had I not just closed that particular project, I could view it….I actually have it set up as all right here. You have the ability to filter on your desktop by all open and close. So you have the ability to filter what is being displayed and you can hide or sort by any of your categories you have here. So from my desktop I have the ability to see any time entries, primary projects, primary service requests, and primary clients. Now that I've created all my service requests for my clients, I've created projects to document my training and other activities, I can go into the time portion and view any of my time entries that I've made thus far and make any new time entries that may need to be made. The default window we're going to come to is to record a new time entry. We can either select record leave, record to a project, or record to a service request. If I select record to a service request, the last 25 time entries I've made of different service requests are going to pre-populate here. So I can just select from there and record time directly to it. Or I can select projects and then select which type of project and record time to it directly. So you always have the ability to record time to either a service request or project or to record leave directly from within the time portion. If I wanted to view my particular entries I've made so far, I can display time sheet, set it for the days in which I want to view that report. It will populate the time sheet with the information it has so far. So far I have a half hour on Wednesday and it's showing as PAIMI which is a direct funded item. Had I recorded an amount of time to a funding source that was specified as indirectly costed item, it would have its own row beneath the direct fund subtotal, which would be referred to as indirect fund subtotal. And so we do break out funding sources on our time sheet differently than in DAD 1.0 where indirect or to be allocated funds were included in the percent total. We also have the ability to select from the drop down our employee time report. This gives us a listing of all of our time entries. I can select filter now and it will show me all the time entries based on the criteria I have selected. If I wanted to amend that criteria, I could just re-show the criteria I had selected or hide it at any time. Labor distribution reports still exist. This is going to be the distribution of time entries for all the employees over a set amount of time. And it still is granted by permission to only limited groups. To close the desktop, it's just as simple as closing the particular window and I had left that window open from earlier and I'll just go ahead and close that. We'll return to our control panel and we just select log out to end the program. That will allow us to log out of the system completely and we always recommend closing your browser window when completed. That completes our demonstration walk through of how to create a client, how to create a service request, and how to create a project. There will be more robust instructions that we will be providing via the DAD support page and materials that are at administrative trainings. This is just to serve as a general orientation to those screens. Thank you.