



PSMS File Management/Work Done on File Screen shots (#1 & #2) Guide

To complete the follow up/work done on file: Please fill in form where arrows are shown.

Screen Shot #1 (below):

- In the “Sub-Type” box select the appropriate option from the drop down list i.e.: corrective action, chart review, meeting with family, etc.) *Note: It will only allow you to pick one option at a time.*
- In the “Method” box select how you did your follow up from the drop down list i.e.: In-person, email, etc.)
- In the “Follow-up To/With” box type in the person’s name you followed up with i.e.: Nurse supervisor’s name, Manager, family member name, etc.
- *Note: You do not need to complete the boxes on the follow up form titled: Time Spent(minutes), Money Spent or Item purchased*

Screen Shot 1: Please fill in form where arrows are shown below.

The screenshot shows a web browser window displaying the 'Behaviour Event Manage Form - 70755'. The main content area is a 'New Work done on file Follow-up' form. The form is divided into several sections: 'General', 'Details', and 'Form Letters'. The 'General' section contains the following fields: 'Type' (Work done on file), 'Sub-Type' (dropdown menu), 'Method' (dropdown menu), 'Date' (2020/04/08), 'Time' (10:43), 'Follow-up By' (User's name will be shown here), 'Follow-up To/With' (dropdown menu), 'Time Spent(minutes)', 'Money Spent', and 'Item Purchased'. The 'Details' section contains 'Form Letters' (Please Select) and 'Populate | Email | Print' buttons. The 'Form Letters' section contains a text area and a note: 'Please call the Service Centre (3600) if you can not enter text in field below'. The 'Form Letters' section also contains 'Cancel' and 'Add' buttons. Arrows point to the 'Sub-Type', 'Method', and 'Follow-up To/With' fields. The browser address bar shows the URL: 'pmsm01/RL6_Test/FilePage.aspx?file=70755&form=BehaviourManage&ReturnUrl=%2FRL6_Test%2Fapp.aspx%23%2FfileViews%2F2543&alertId=&showhideack='.



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Screen Shot #2 (below): **Please fill in form where arrows are shown.**

Under “Details” please enter in the box your follow up/work done on file you have done.

Note: If you have any attachments (letter, pictures) as part of the follow up work on file these can be attached by selecting the ADD button in blue below the details box.

Screen shot 2: **Please fill in form where arrows are shown below.**

The screenshot shows a web browser window displaying the 'Behaviour Event Manage Form - 70755'. A modal window titled 'New Work done on file Follow-up' is open. The form contains the following fields and sections:

- Money Spent:** A text input field.
- Item Purchased:** A dropdown menu.
- Details:** A section containing a 'Form Letters' dropdown menu, 'Populate', 'Email', and 'Print' buttons.
- Text Box:** A large text area with the instruction: 'Please enter in this box the follow up/work done on file you have done.' Below it is a note: 'Note: If you have any attachments (letters, pictures) as part of the follow up/work done on file these can be attached by selecting the ADD button below.' An arrow points to this text box.
- Attachments:** A section with 'Open', 'Add', 'Modify', and 'Remove' buttons. Below these is a table with columns 'FileName', 'Category', and 'Description'. The table currently contains one row with 'Not Specified' in the 'FileName' column. An arrow points to the 'Add' button.
- Buttons:** 'Cancel' and 'Add' buttons are at the bottom right of the modal. An arrow points to the 'Add' button.

When you have completed the “Details” information in the text box, select the green **ADD** button to save your work done on file.