

# **Behavioral Health System v4.0 Manager Utilities and Reports Training Agenda**

## **Day 1**

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| <b>15 min</b>  | <b>Introductions and Course Logistics</b>  |
| <b>90 min</b>  | <b>Review of Application Set-Up and Security</b><br>Review of Manager Utilities Menu<br>Editing Site Parameters – Defaults<br>Update those allowed to see all visits<br>Interactive PCC Link<br>Electronic Signature |
| <b>15 min</b>  | <b>Break</b>   |
| <b>105 min</b> | <b>Management Tools</b><br>Management Tools located on Manager Utilities Menu<br>Case Management Tools on DE Menu<br>Case Management Tools on PDE Menu<br>Case Management Tools on DSP Menu                          |
| <b>60 min</b>  | <b>Lunch</b>   |
| <b>120 min</b> | <b>Generating Basic Reports</b><br>PAT<br>REC<br>WL<br>PROB  |
| <b>15 min</b>  | <b>Break</b>   |
| <b>60 min</b>  | <b>Independent Report Exercises</b>  |
| <b>15 min</b>  | <b>Questions and Review</b>  |

## **Day 2**

<b>30 min</b>	<b>Questions and Review</b>
<b>60 min</b>	<b>Converting Reports to Excel or Word</b>
<b>15 min</b>	<b>Break</b>
<b>105 min</b>	<b>How to Use GEN and PGEN Options</b>
<b>60 min</b>	<b>Lunch</b>
<b>60 min</b>	<b>Converting Reports to Excel or Word (Exercises including GEN and/or PGEN)</b>
<b>45 min</b>	<b>Exporting Data</b>
<b>15 min</b>	<b>Break</b>
<b>60 min</b>	<b>Independent Exercises</b>
<b>30 min</b>	<b>User Support, Questions and Course Evaluation</b>