

How to use TSSAP Manager – Instructions

[1. Searching](#)

[2. Booking a session](#)

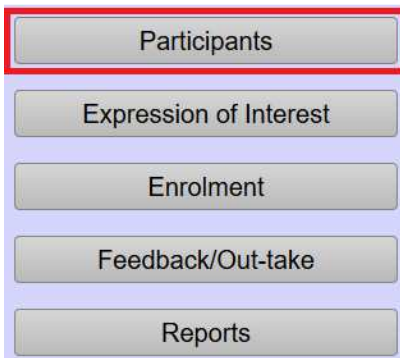
[3. Expression of interest](#)

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[5. Enrolment/Intake \(1st Session\)](#)

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1. **Searching** – The first thing you should do when dealing with a customer is search for them. Now you only have to search in 'Participants'. This contains all the people who are 'enrolled' and 'expression of interest'



- 1.1. From 'Participants' you can now see whether the person is 'Expression of Interest' or 'Enrolled'

ID	Family Name	Other Names	Address	Postcode	Phone:Home	Mobile
5	Madden	James	64 Mullumbimby Rd	2564	6625 0214	
4	Carriage	John	74 Murton Ave	2088		
3	Streens	Julia	45 Hobby Ln	4478	07 6658 9654	
2	Jollien	Ray	12 Murton Ave	1245		
1	Trent	Damien	162 Tweed Coast Rd	2045	0418963547	

Showing 1 to 5 of 5 entries 1 row selected

Tracking history Participant Details Manage Bookings

Name: James Madden

Occasions of Service - Tracking History

Expression of interest: 05/06/2016 - Entered by: Dawson
Enrolled: No -
Booked in TSSAP #1: 15/06/2016 - Time: 13:45 - Tutor: Kerry - Entered by: Dawson
Feedback given: No
Technical support session: N/A

2. **Booking a session** – To book a session. ‘Go into Participants’. Select the person you want to book. Then click ‘Manage Bookings’ tab

The screenshot shows a web application interface. At the top, there is a table with 8 columns: ID, Family name, Other Names, Address, Postcode, Phone.Home, Mobile, and Email. The table contains 5 rows of participant data. Below the table, there are navigation buttons: 'Previous', '1', and 'Next'. Underneath, there are three tabs: 'Tracking history', 'Participant Details', and 'Manage Bookings' (which is highlighted with a red box). The 'Manage Bookings' section contains a sub-table with columns: ID, Date, Time, Type, Tutor, and Entered by. This sub-table has one row with the following data: 7, 15/06/2016, 13:45, tssap1, Kerry, Dawson. To the right of this sub-table is a 'Notes:' text area. Below the sub-table and notes area are several form fields: 'Date:' with a calendar icon, 'Time:', 'Type:' with a dropdown menu, 'Entered by:', 'Tutor:', and 'Attended:' with a checkbox. At the bottom right of this section are 'Clear' and 'Save' buttons.

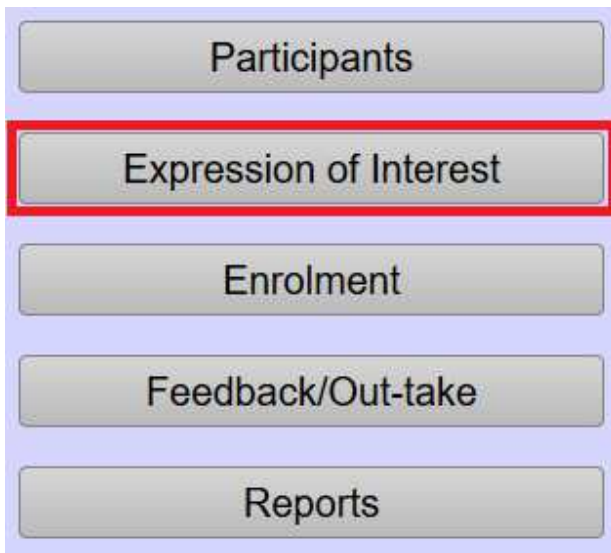
Here you can enter booking information. You can also update booking information by clicking on the booking and entering notes or editing other booking details

This screenshot is similar to the previous one but shows the 'Manage Bookings' tab selected. The sub-table from the previous screenshot is now highlighted with a red border. The 'Notes:' text area now contains the text 'Worked on copying photos from'. The form fields below the sub-table are also populated with the data from the selected row: 'Date:' is 15/06/2016, 'Time:' is 13:45, 'Type:' is TSSAP#1, 'Entered by:' is Dawson, and 'Tutor:' is Kerry. The 'Attended:' checkbox is still unchecked. The 'Clear' and 'Save' buttons are visible at the bottom right.

When you have finished entering a booking click **Save**.

3. **Expression of Interest** – the purpose of this tool is to quickly record basic contact details of someone who is interested in participating in the Tech Savvy Seniors Assistance Program (TSSAP) provided by the PBN Tech Centre. This tool is used prior to official Intake/Enrolment.

3.1. Click ‘Expression of Interest’ on the Home page.



- 3.2. Enter the person's details into the appropriate fields. (Mandatory fields are marked with an asterix).
- 3.3. Then click **Save**.

Tech Savvy Seniors Assistance Program
Expression of Interest

Contact information
** Required*

First name:* John Last Name:* Davies

Address: 1/24 Emerald Cr

Town/Suburb: Pottsville State: New South Wales Postcode: 2653

Contact number: 0145632541 Email: john.davies@hotmail.com Enrolled:

Referral Source:* PBNAC

Date of expression:* 04/05/2016 Additional notes:
Date format: DD/MM/YYYY

Entered by:* Garry

Clear Save

4. **Referral Source** – If the person has come from a participating Tech Savvy Seniors (TSS) community college. You can select the **TSS provider** by choosing **TSS Provider** option.
 - 4.1. Then specify the community college from the drop-down list which appears once the TSS option is selected.

Referral Source:* TSS provider Murwillumbah Community Col

Date of expression:*

Entered by:*

Additional notes:

Please select..

PBNC

Word of mouth

Website

Newspaper

Notice board

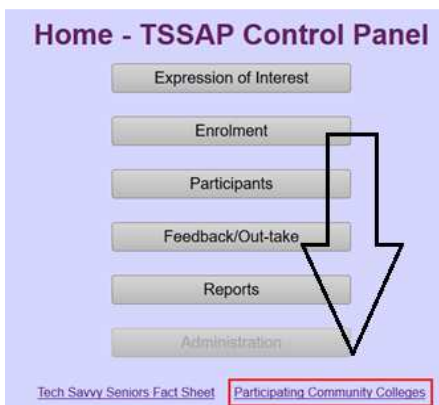
Health Centre

Murwillumbah Library

TSS provider

Other

(see Participating Colleges link on Home page for more info)

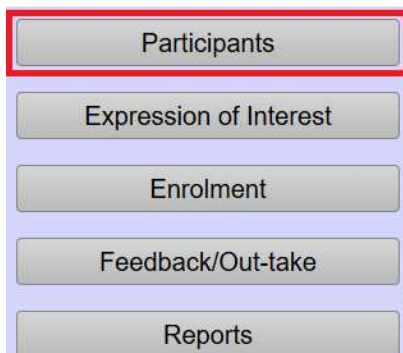


Other Referral Source – If the Referral source is not listed. You can select Other. This opens a text field in which you can enter another referral source.

Referral Source:* Other If other, specify:

5 Enrolment/Intake (1st Session) – When the customer attends their first appointment they need to be officially enrolled which involves gathering a little more information about them and entering them as an enrolled participant into the system.

5.1 First go to **'Participants'**.



5.2 Search for the person using the 'Search' field. (You can search by last name, first name, phone number, etc.)
(Note: If the person is not already in the database. They can be enrolled straight away).

Participants

Search for Participant: (you can search using first name, last name, address, email)
(Click on row to select)

ID	Family Name	Other Names	Address	Postcode	Phone:Home	Mobile	Email	Date of birth	P
3	Streens	Julia	45 Hobby Ln	4478	07 6658 9654			0000-00-00	

Showing 1 to 1 of 1 entries (filtered from 5 total entries) 1 row selected Previous **1** Next

Tracking history Participant Details Manage Bookings

Name: Julia Streens

Occasions of Service - Tracking History

Expression of interest: 14/06/2016 - Entered by: James Wilson
Enrolled: No -
Feedback given: No
Technical support session: N/A

5.3 Once you have found the person. Click the **Enrol Now** button. This will take you directly to the 'Enrolment' form and pre-fill some of the information already gathered.

Participants

Search for Participant: (you can search using first name, last name, address, email)
(Click on row to select)

ID	Family Name	Other Names	Address	Postcode	Phone:Home	Mobile	Email	Date of birth	P
3	Streens	Julia	45 Hobby Ln	4478	07 6658 9654			0000-00-00	

Showing 1 to 1 of 1 entries (filtered from 5 total entries) 1 row selected Previous **1** Next

Tracking history Participant Details Manage Bookings

Name: Julia Streens

Occasions of Service - Tracking History

Expression of interest: 14/06/2016 - Entered by: James Wilson
Enrolled: No -
Feedback given: No
Technical support session: N/A

Enrolment Screen - with pre-filled information

[Return Home](#)

TSSAP Intake Form

Contact details
* Required

Family name:* Other name(s):* Additional notes:

Address:*

Town/Suburb:* State:* Postcode:*

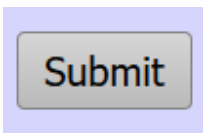
Phone Home: Mobile: Email:

Date of Birth: * Place of Birth:* Gender

Preferred method of contact * Referral Source:*

Date of enrolment.* Entered by.*

5.4 Fill out the rest of the form with the customer. Then click **Submit** button.



5.5 Now the Enrolment should be complete and you will be redirected to the **Participants** screen. You should be able to see the customer now is in the system.

Participants

Search for Participant: (you can search using first name, last name, address, email)
 (Click on row to select)

ID	Family Name	Other Names	Address	Postcode	Phone:Home	Mobile	Email
5	Madden	James	64 Mullumbimby Rd	2564	6625 0214		
4	Carriage	John	74 Murton Ave	2088			jmurton@hotmail.com
3	Streens	Julia	45 Hobby Ln	4478	07 6658 9654		
2	Jollien	Ray	12 Murton Ave	1245			ray.jollien@gmail.com
1	Trent	Damien	162 Tweed Coast Rd	2045	0418963547		

Showing 1 to 5 of 5 entries 1 row selected Previous Next

Tracking history | Participant Details | Manage Bookings

Name: Julia Streens

Occasions of Service - Tracking History

Expression of interest: 14/06/2016 - Entered by: James Wilson
 Enrolled: No -
 Feedback given: No
 Technical support session: N/A

5.6 After you have completed the lesson with the customer update the **Lesson Notes** and tick the **Attended** checkbox.

ory Participant Details Manage Bookings

ID	Date	Time	Type	Tutor	Entered by
7	15/06/2016	13:45	tssap1	Kerry	Dawson

Notes:
Worked on copying photos from

Date: 15/06/2016 Time: 13:45 Type: TSSAP#1

Entered by: Dawson Tutor: Kerry

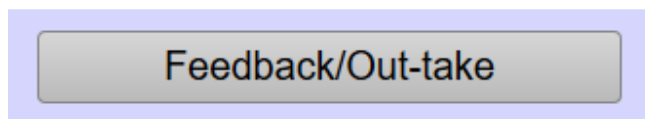
Attended:

Clear Save

5.7 Click **Save**.

6 Feedback/Out-take - Once the customer has completed their 2 free sessions. They need to complete the Feedback form. This will allow us to gather some feedback information for reporting and future use.

6. 1 Click Feedback/Out-take



6.2 Search for the Participant using the Search field. Then click on them to select them.

Feedback Entry Form

Search for Participant: (you can search using first name, last name, address, email)

(Click on row to select)

other_names	family_name	address	postcode	phone_home	phone_mobile	email
John	Davies	1/24 Emerald Cr	2653	0145632541		john.davies@hotmail.com

Entering Feedback for:

On a scale of 1-10 how would you rate the Tech Savvy Seniors Assistance Program session **CONTENT**?
(1 being 'poor', 10 being 'excellent')

1 2 3 4 5 6 7 8 9 10

On a scale of 1-10 how would you rate the Tech Savvy Seniors Assistance Program session **TUTOR**?
(1 being 'poor', 10 being 'excellent')

1 2 3 4 5 6 7 8 9 10

6.3 Complete the form and then Click **Submit**.