

Getting Started – General Actions

Adding, Editing & Deleting different types of Information

How you add, edit and delete information is generally the same for each area of the system. If it is different, we will highlight this.

We suggest you start by filling in some information about yourself, in the “About me” area, to try out these functions. However there are no rules about what information you enter, just add in what you consider to be important and valuable to you and those you share with.

Setting up and entering information for your child or other person you care for is the same process. However you will first need to set them up with a managed account. See **Getting Started – Managed Account** and then access their account to add, edit, delete their information.

Adding New Information

Select the area you want to add information into by clicking on the tile on the dashboard. You may then see more options available to you on the left of the screen. Select the category and click on “click here to get started” or “add new”. If neither are available click on the “edit button” found at the top right of the screen.

A form will open letting you add information. Fill in the information and click **save** before exiting the page. If you don’t want to save the information, select **cancel**. The save option will include the name of the data type you are saving.



Add new information using voice dictation if using a smartphone or tablet

With the cursor in the field click on the microphone button on the keypad and dictate information into the fields.

Editing Information

To make changes to information already entered click on the area/category you want to edit, the specific page will display showing already entered information, then select **edit**. The page will then open in edit mode allowing you to make the changes. Always select **save** to save the changes or **cancel** to exit without saving the change.

Deleting Entries

Some entries may be deleted completely. The option to delete is generally available from the edit page. First open the page in edit mode, by selecting the **edit** option, the delete option will be at the end of the form. When you select delete you will be asked to confirm you want to delete the item.

Adding/Removing Multiple items

1. Select item from the drop down box (If you don't see what you are looking for select other you can manually add the item)

2. Click on Add

To remove an item. Click on remove

Other areas where this functionality is available work in the same way, for example adding multiple items/people; after each selection click on the **add** to ensure your selection is saved, you will also need to **save** the page.

Adding a Photograph

This is available on the Personal page, most About Me pages and the Journal page. Click on **upload image**, then select an image from your computer/device and choose open. You can adjust the size of the picture and rotate it. Select the **tick** once happy. To change a picture select upload again and just choose a new picture. To delete a picture select the delete option next to the picture.

Upload may fail if the size of the image is too large so try again with a smaller image.

Adding multiple records linked to: one person (consultations), a school (attendance, class information), a hospital (admissions)

Some areas will require you to enter some information and save it before then being able to see and add additional information.

For Example to add **consultations**: This is particularly helpful for visits to the GP or others you see regularly.

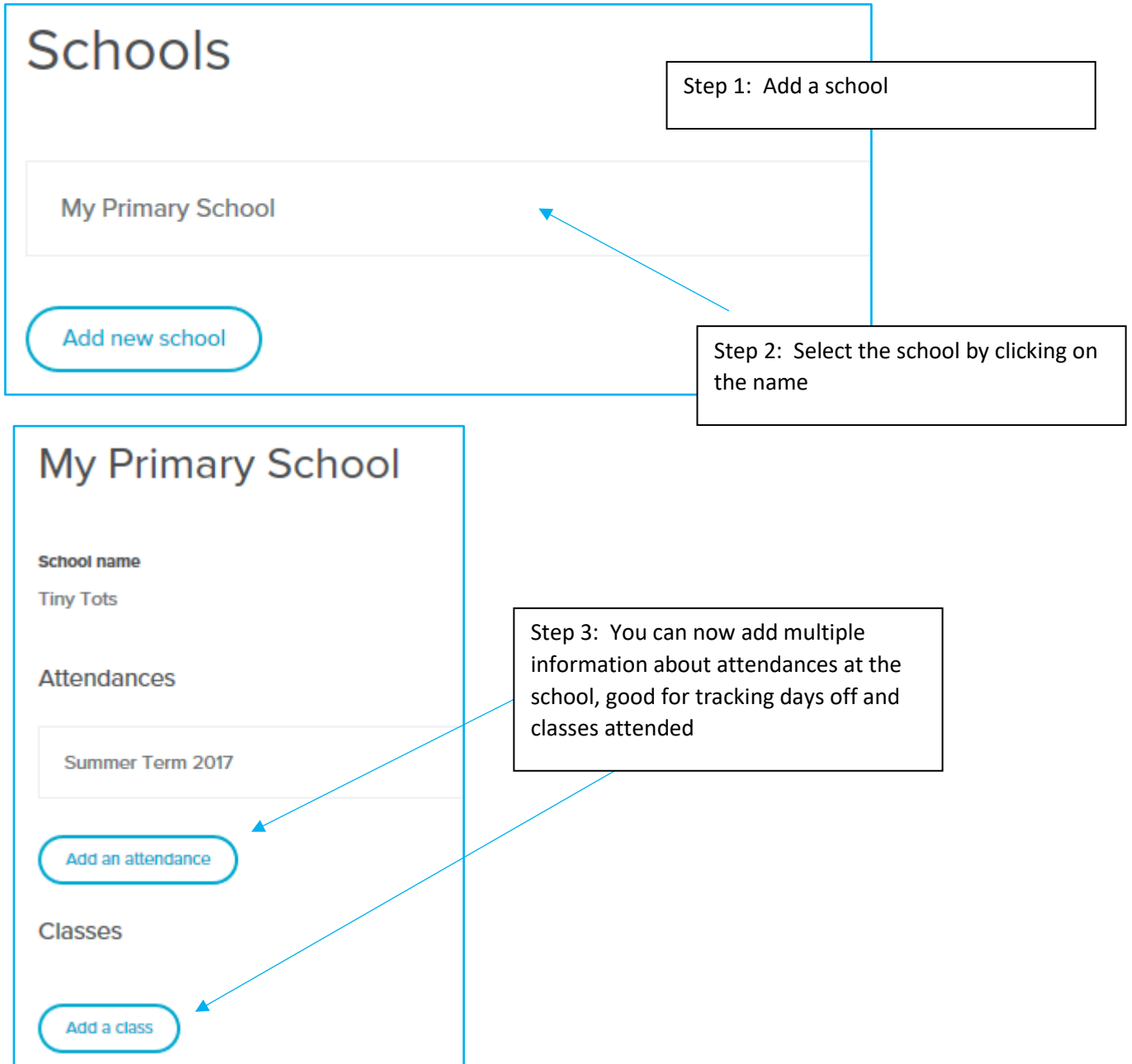
Step 1: From the drop down add/select the name of the person you are seeing and save that information. To edit information about the **person** click on the name of the **person** and then select **edit consultation...**

Step 2: Click on the name of the person you have just added and you will now see the option to **add appointments**. You can now keep a record of each visit/appointment with that person. To edit the **appointment** details click on the **appointment** and select **edit appointment**.

Schools work in the same way.

Step 1: Add/select the school and save

Step 2: Select the school and the option to add attendance periods and classes becomes available



Hospital Admissions: Works the same way, you first add the hospital then you can add details about each admissions to that hospital.