

## 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.

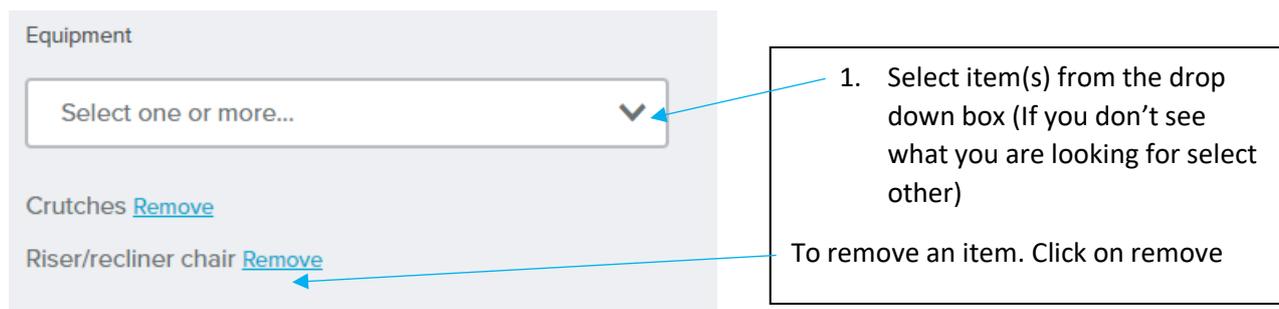
### Editing Information

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



Equipment

Select one or more...

Crutches [Remove](#)

Riser/recliner chair [Remove](#)

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

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.

## 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. To change a picture select upload again and select 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. There will be a new version enabling multiple photos to be uploaded and more control over rotation and cropping.

## Adding multiple records linked to: one person (e.g 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 recording e.g 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 the organisation they work for. save that information. To amend the name of the person or the organisation 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 an appointment**. Click on this and you can now record details about a visit/appointment with that person, save when finished. To edit the information you have recorded in an **appointment** first click on the **appointment** and then select **edit appointment**, make changes and save. To get back to the overview of people you consult with click on Back to consultations

**Schools** work in the same way.

**Step 1:** Add/select the school and add information about the school, save

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

**Schools**

My Primary School

Add new school

**Step 1: Add a school**

**Step 2: Select the school by clicking on the name**

**My Primary School**

School name  
Tiny Tots

Attendances

Summer Term 2017

Add an attendance

Classes

Add a class

**Step 3: You can now add multiple information about attendances at the school, good for tracking days off and when you add a class you can e.g add individual classes e.g maths, English etc and include details about the teacher, the year, notes etc. OR you can use classes at the level of Year Group. You can decide what is best for you.**

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