

ProActivity Reports

User Guide

This document will help you get started using ProActivity Reports. It has three parts.

The first part, “**Overview Tour of ProActivity Reports**”, walks you through the major areas of the software to give you a high-level view of what the software can do for you.

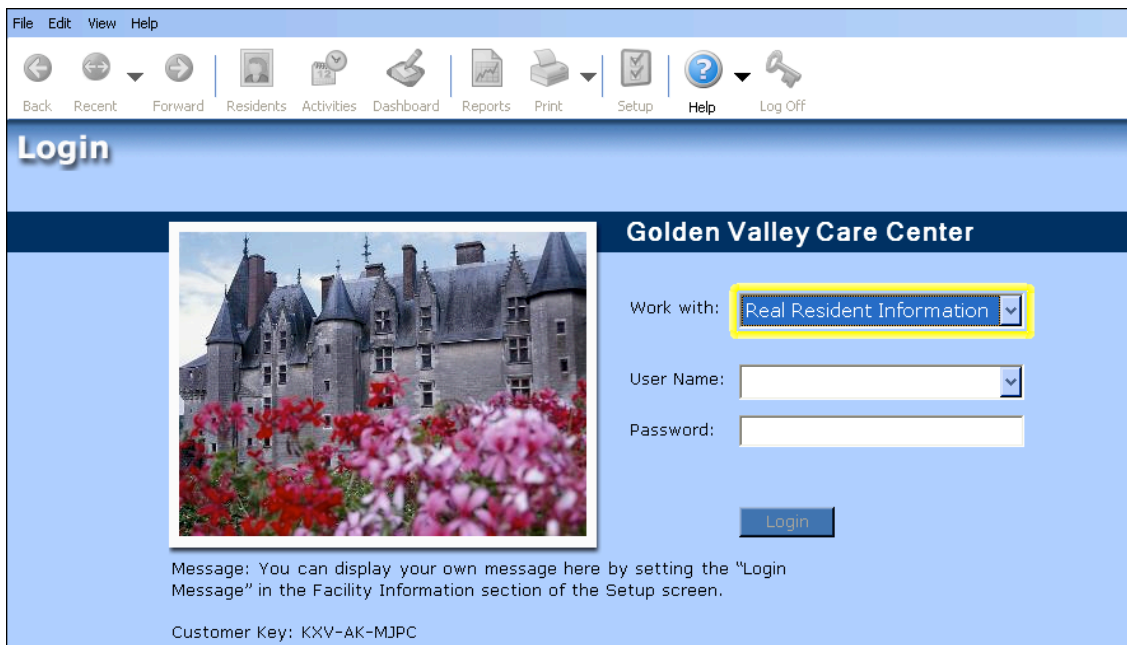
The second part, “**Getting Started**”, shows you how to set up the system to work the way your facility works.

The third part, “**Step-by-Step Guides**”, is organized around specific actions that you’re likely to want to do, such as setting up your system, adding residents, or creating activities. If you need help figuring out how to do something, just scan the table of contents at the beginning of this document and jump straight to the step-by-step guide for that action.

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Overview Tour of ProActivity Reports

The first screen that appears when you run ProActivity Reports is the Login Screen.

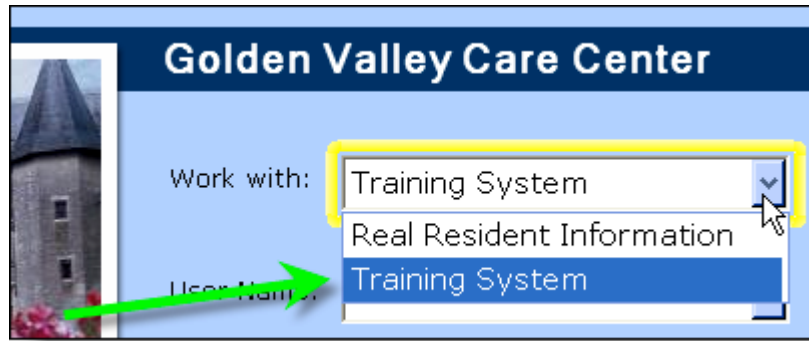


The screenshot shows the ProActivity Reports Login Screen. At the top is a menu bar with 'File', 'Edit', 'View', and 'Help'. Below it is a toolbar with icons for Back, Recent, Forward, Residents, Activities, Dashboard, Reports, Print, Setup, Help, and Log Off. The main area has a blue header with the word 'Login' in white. Below the header is a dark blue banner with the text 'Golden Valley Care Center'. To the left of the login form is a photograph of a large, multi-story building with many windows and a red flower bed in the foreground. To the right of the photo is the login form, which includes a 'Work with:' dropdown menu set to 'Real Resident Information', a 'User Name:' text box, a 'Password:' text box, and a 'Login' button. Below the form, there is a message: 'Message: You can display your own message here by setting the "Login Message" in the Facility Information section of the Setup screen.' and a 'Customer Key: KXV-AK-MJPC'.

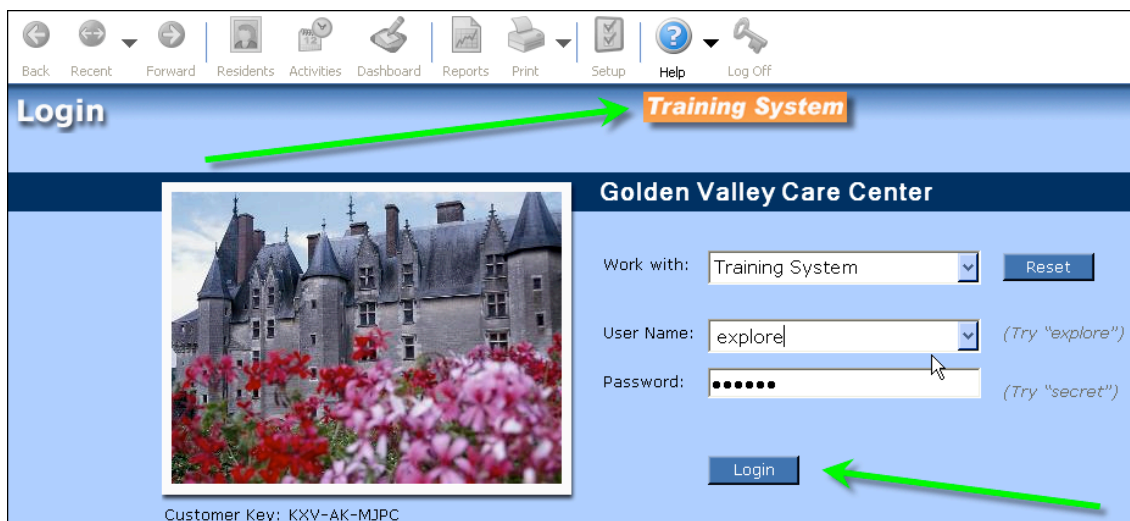
ProActivity Reports is a multi-user system. It works over your computer network. Multiple people can use the system at the same time. You'll all share the same information about your residents and activities. Changes that you make will be automatically updated on your co-workers' computers. You tell ProActivity Reports who you are by typing in your user name and password.

ProActivity Reports also has a built-in Training System. The training system provides new users an opportunity to explore the system. You can make changes to information about fake residents and activities without worrying about affecting any of the information about your real residents.

For this overview tour, we want to switch to the Training System.



From the “Work with:” menu immediately under your facility name (“Golden Valley Care Center” in the picture above), choose “Training System”.



The Login Screen changes to show you that you’re now using the Training System. An orange box that says “Training System” appears at the top of the screen.

Type “explore” (without the quotes) into the “User Name:” box.
Type “secret” (without the quotes) into the “Password:” box.
Click the “Login” button.

The “Residents” Screen

When you log in to ProActivity Reports for the first time, you’ll be taken to the Residents Screen. This screen displays detailed information about your residents.

Residents

New Import Delete

Show all current residents in all groups

Name	Group
Carl Brownfield	Willow (Dem...)
Mary Chambers	Willow (Dem...)
Tom Clouse	Evergreen (R...)
Anna Crawford	Maple (Long...)
Brenda Dean	Evergreen (R...)
Dale Dean	Maple (Long...)
Ruth Feldman	Maple (Long...)
Bill Fenton	Maple (Long...)
Janet Harrison	Maple (Long...)
Shirley Hart	Maple (Long...)
Robert Hinton	Willow (Dem...)
Laura Miller	Maple (Long...)
Hazel O'Sulliv...	Willow (Dem...)
Charles Plum...	Maple (Long...)
Steve Santini	Evergreen (R...)

“FirstName LastName” order
“LastName, FirstName” order

Carl Brownfield Room 153

Male 86 (1/4/1920?) Willow (Dementia)

Call Carl's daughter re radio (Due 8/10/2006)

Mobility: Cane; Very unsteady without use of the ca...

Current Diagnosis: Alzheimers, COPD

Special Instructions: Has used cane as a weapon in the past. W...

Face Sheet Interests Participation Observations Progress Census To Do's

Show Summary section

Administrative: Mr. Carl Brownfield; Male; 86

Interests: Outing, Music, Spiritual, Physical, Cognitive

Personal: Other; Never Married

Lifestyle: Involved with Coon Hunters Assoc.

History: 8th grade/less; Veteran; Farmer

Care: alert, oriented to person; Has Diagnosis, Therapies and Sp...

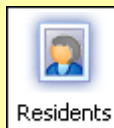
Diet: mechanical soft

Precautions: Allergies, Elopement, Falls

Releases: Activities, Birthdate, Photo

Contacts: Mae Wilson: 414-354-6676 (Home)

If your screen doesn’t say “Residents” in large white letters at the top left of the window, click the “Residents” icon on the main toolbar at the top of the screen.



This will take you to the Residents Screen.

Resident List

The left part of the screen is the “**Resident List**”. It shows all of the residents in your facility. When you click on a resident’s name in the list, ProActivity Reports displays that resident’s information in the Resident Detail Area on the right.

Click on a few resident names and see that the Resident Detail Area shows each resident’s information.

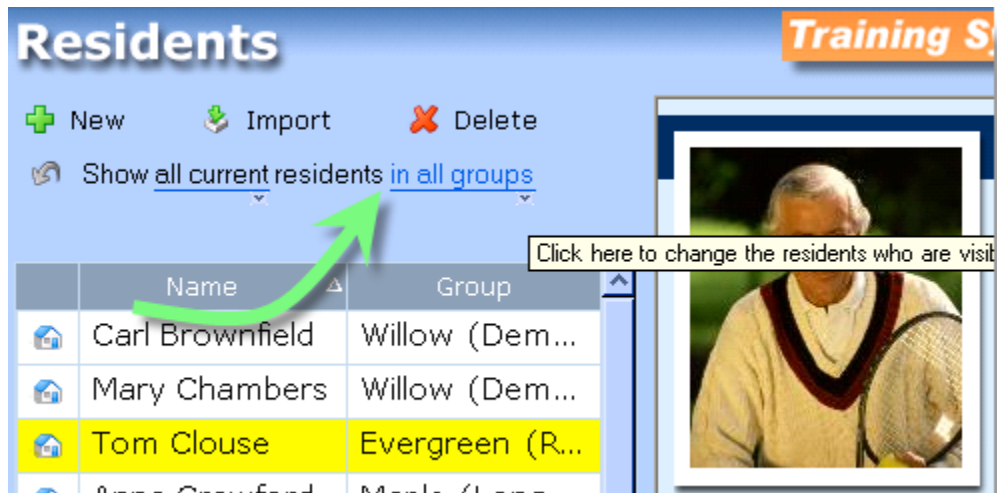
The Resident List also shows which group each resident belongs to. In the Training System, there are three groups:

- ☐ Maple, for Long Term Care residents
- ☐ Evergreen, for Rehabilitation residents
- ☐ Willow, for Dementia residents

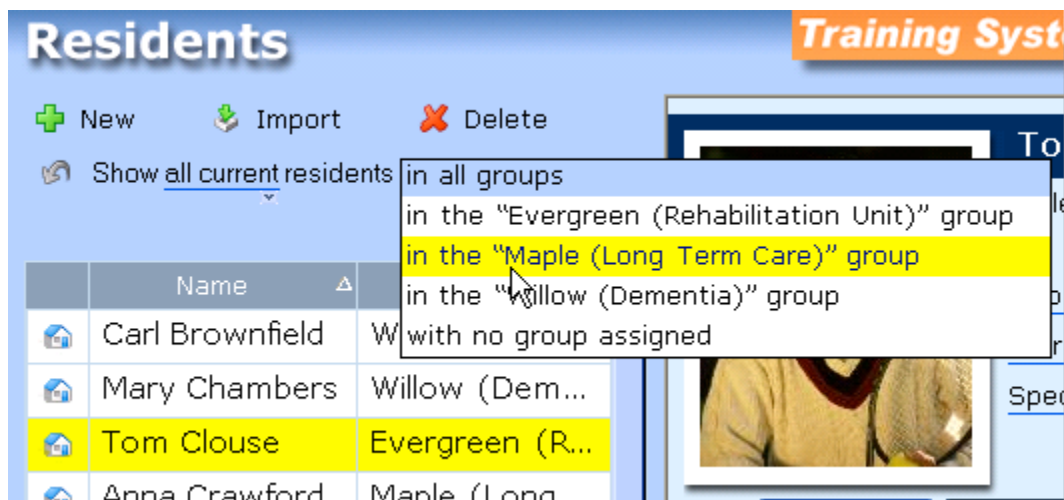
You can set up your groups to reflect the way your own facility is organized. We’ll cover that later when we explore the Setup Screen.

Filter Menus

At the top of the Resident List is a “**Filter Menu**”. It controls which residents appear in the list.

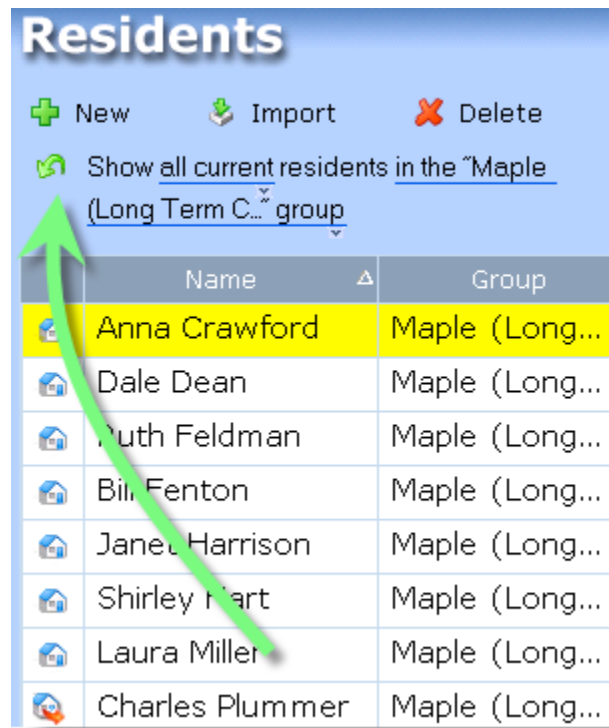


Click on the blue words “in all groups”. From the menu that appears, choose the “Maple (Long Term Care)” group.



Notice that the Resident List now shows only residents who are in the “Maple” group.

You may also have noticed that the little grey arrow to the left of the filter menu has turned green. This is the **“Reset” arrow**. It’s a shortcut to put the filter menu back to its normal condition.



Click the Reset arrow to make all the current residents reappear in the Resident List.

Filter menus and their Reset arrows are an important way to control which information ProActivity Reports shows you. You’ll see that they’re used in many other parts of the system.

Resident Detail Area

The right side of the Residents screen shows the “**Resident Detail Area**”. The upper part is called the “**Resident Header**”, and the lower part is called the “**Resident Tabs**”.

The screenshot shows the 'Residents' screen in the 'Training System'. On the left is a list of residents with columns for Name and Group. Carl Brownfield is selected, and his group is Willow (Dementia). The main area on the right is the 'Resident Detail Area'. It has a 'Resident Header' at the top with a photo of Carl Brownfield, his name, room number (153), age (86), and group (Willow (Dementia)). Below the header are tabs for Face Sheet, Interests, Participation, Observations, Progress, Census, and To Do's. The 'Face Sheet' tab is active, showing a 'Summary section' with various fields: Administrative (Mr. Carl Brownfield; Male; 86), Interests (Outing, Music, Spiritual, Physical, Cognitive), Personal (Other; Never Married), Lifestyle (Involved with Coon Hunters Assoc.), History (8th grade/less; Veteran; Farmer), Care (alert, oriented to person; Has Diagnosis, Therapies and Sp...), Diet (mechanical soft), Precautions (Allergies, Elopement, Falls), Releases (Activities, Birthdate, Photo), and Contacts (Mae Wilson: 414-354-6676 (Home)).

Name	Group
Carl Brownfield	Willow (Dem...)
Mary Chambers	Willow (Dem...)
Tom Clouse	Evergreen (...)
Anna Crawford	Maple (Long...)
Brenda Dean	Evergreen (...)
Dale Dean	Maple (Long...)
Ruth Feldman	Maple (Long...)
Bill Fenton	Maple (Long...)
Janet Harrison	Maple (Long...)
Shirley Hart	Maple (Long...)
Robert Hinton	Willow (Dem...)
Laura Miller	Maple (Long...)
Hazel O'Sullivan	Willow (Dem...)
Charles Plumm...	Maple (Long...)
Steve Santini	Evergreen (...)

Resident Header

Carl Brownfield Room 153

Male 86 (1/4/1920?) Willow (Dementia)

Call Carl's daughter re radio (Due 8/10/2006)

Mobility: Cane; Very unsteady without use of the ca...

Current Diagnosis: Alzheimers, COPD

Special Instructions: Has used cane as a weapon in the past. W...

Resident Tabs

Administrative: Mr. Carl Brownfield; Male; 86

Interests: Outing, Music, Spiritual, Physical, Cognitive

Personal: Other; Never Married

Lifestyle: Involved with Coon Hunters Assoc.

History: 8th grade/less; Veteran; Farmer

Care: alert, oriented to person; Has Diagnosis, Therapies and Sp...

Diet: mechanical soft

Precautions: Allergies, Elopement, Falls

Releases: Activities, Birthdate, Photo

Contacts: Mae Wilson: 414-354-6676 (Home)

Resident Header

The Resident Header displays a summary of information about the currently selected resident. In addition to the resident's name, room number, age, and group, it also shows three “**Preferred Fields**”.

The screenshot shows the 'Residents' screen in the 'Training System'. On the left is a list of residents with columns for Name and Group. Carl Brownfield is selected, and his group is Willow (Dementia). The main area on the right is the 'Resident Detail Area'. It has a 'Resident Header' at the top with a photo of Carl Brownfield, his name, room number (153), age (86), and group (Willow (Dementia)). Below the header are tabs for Face Sheet, Interests, Participation, Observations, Progress, Census, and To Do's. The 'Face Sheet' tab is active, showing a 'Summary section' with various fields: Administrative (Mr. Carl Brownfield; Male; 86), Interests (Outing, Music, Spiritual, Physical, Cognitive), Personal (Other; Never Married), Lifestyle (Involved with Coon Hunters Assoc.), History (8th grade/less; Veteran; Farmer), Care (alert, oriented to person; Has Diagnosis, Therapies and Sp...), Diet (mechanical soft), Precautions (Allergies, Elopement, Falls), Releases (Activities, Birthdate, Photo), and Contacts (Mae Wilson: 414-354-6676 (Home)).

Name	Group
Carl Brownfield	Willow (Dem...)
Mary Chambers	Willow (Dem...)
Tom Clouse	Evergreen (...)
Anna Crawford	Maple (Long...)
Brenda Dean	Evergreen (...)
Dale Dean	Maple (Long...)
Ruth Feldman	Maple (Long...)
Bill Fenton	Maple (Long...)
Janet Harrison	Maple (Long...)
Shirley Hart	Maple (Long...)
Robert Hinton	Willow (Dem...)
Laura Miller	Maple (Long...)
Hazel O'Sullivan	Willow (Dem...)
Charles Plumm...	Maple (Long...)
Steve Santini	Evergreen (...)

Preferred Fields

Carl Brownfield Room 153

Male 86 (1/4/1920?) Willow (Dementia)

Call Carl's daughter re radio (Due 8/10/2006)

Mobility: Cane; Very unsteady without use of the ca...

Current Diagnosis: Alzheimers, COPD

Special Instructions: Has used cane as a weapon in the past. W...

Face Sheet Interests Participation Observations Progress Census To Do's

ProActivity Reports lets you keep track of dozens of different kinds of information about each resident. The Preferred Fields let you choose three of your favorites to show in the Resident Header.

Click on the “Mobility” Preferred Field. From the menu that appears, choose “Cognitive Level”.

The Resident Header now shows the resident’s cognitive level.

This screenshot shows the Resident Header for Carl Brownfield, Room 153. The header includes a photo of Carl with a dog, his name, room number, age (86), date of birth (1/4/1920?), and diagnosis (Willow (Dementia)). A task is listed: "Call Carl's daughter re radio (Due 9/7/2006)". The "Cognitive Level" field is highlighted with a yellow box and a green arrow pointing to it. The "Current Diagnosis" field shows "Alzheimer's" and "COPD". The "Special Instructions" field shows "Has used cane as a weapon in the past. W...".

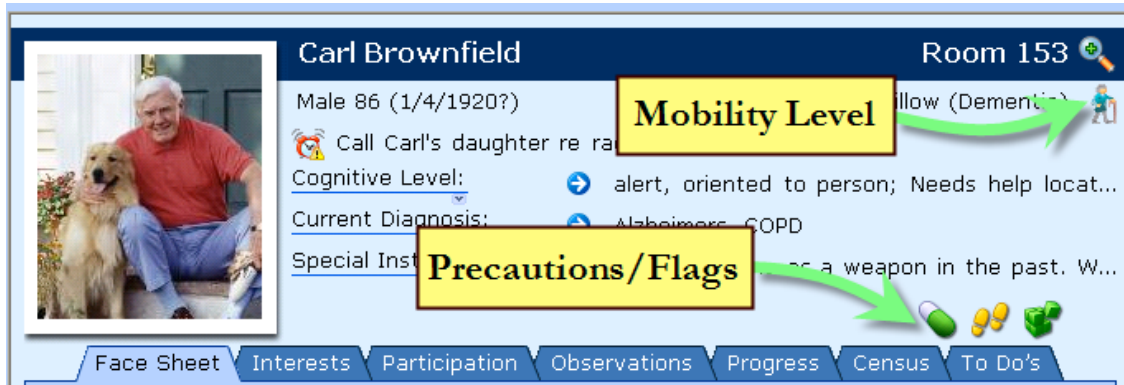
Field	Value
Name	Carl Brownfield
Room	Room 153
Age	Male 86
DOB	(1/4/1920?)
Diagnosis	Willow (Dementia)
Task	Call Carl's daughter re radio (Due 9/7/2006)
Cognitive Level	alert, oriented to person; Needs help locat...
Current Diagnosis	Alzheimer's COPD
Special Instructions	Has used cane as a weapon in the past. W...

If there’s a **To Do** item due for this resident, it will appear right above the Preferred Fields.

This screenshot shows the Resident Header for Carl Brownfield, Room 153. The header includes a photo of Carl with a dog, his name, room number, age (86), date of birth (01/04/1920?), and diagnosis (Willow (Dementia)). A task is listed: "Call Carl's daughter re radio (Due 08/10/2006)". The "Cognitive Level" field is highlighted with a yellow box and a green arrow pointing to it. The "Current Diagnosis" field shows "Alzheimer's". The "Special Instructions" field shows "Has used cane as a weapon in the past. W...". A yellow box labeled "Next 'To Do'" is positioned above the "Cognitive Level" field.

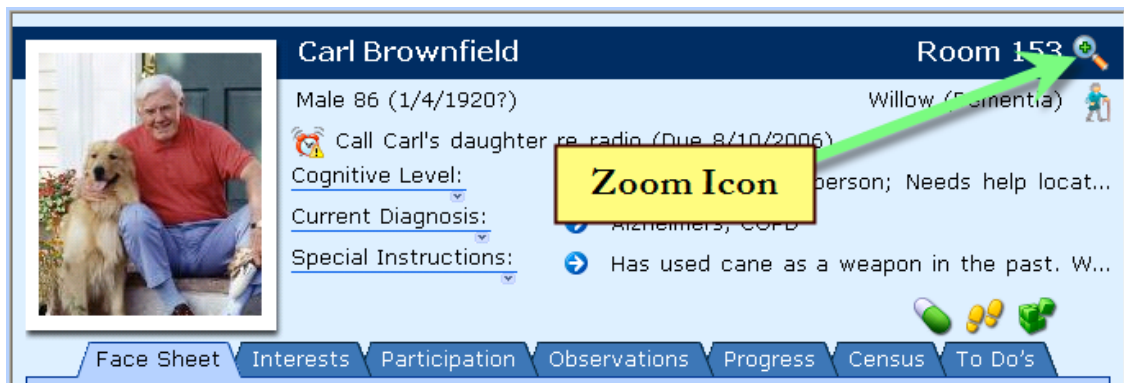
Field	Value
Name	Carl Brownfield
Room	Room 153
Age	Male 86
DOB	(01/04/1920?)
Diagnosis	Willow (Dementia)
Task	Call Carl's daughter re radio (Due 08/10/2006)
Cognitive Level	alert, oriented to person; Needs help locat...
Current Diagnosis	Alzheimer's
Special Instructions	Has used cane as a weapon in the past. W...

The right side of the Resident Header also shows icons that indicate the resident's **Mobility Level** and any **Precautions or Flags** that are relevant for this resident.



Hold the mouse over the Mobility Level icon. (Don't click.)
Hold the mouse over the Precautions/Flags icons. (Don't click.)
Notice the ToolTip Help that appears which explains what each icon means.

One other useful tool in the Resident Header is the **Zoom Icon**. It looks like a magnifying glass. It's in the upper right.




The Zoom Icon lets you tell ProActivity Reports to use the whole screen to show just one resident's detail information. It gives you more room by hiding the Resident List and Header.

Click the Zoom Icon to zoom the Resident Detail Area.




Residents




Training System



Carl Brownfield

Room 153

Willow (Dementia)

Face Sheet

Interests

Participation

Observations

Progress

Census

To Do's

Show Summary section

Administrative:

Mr. Carl Brownfield; Male; 86

Interests:

Outing, Music, Spiritual, Physical, Cognitive

Personal:

Other; Never Married

Lifestyle:

Involved with Coon Hunters Assoc.

History:

8th grade/less; Veteran; Farmer

Care:

alert, oriented to person; Has Diagnosis, Therapies and Special Instructions

Diet:

mechanical soft

Precautions:

Allergies, Elopement, Falls

Releases:

Activities, Birthdate, Photo

Contacts:

Mae Wilson: 414-354-6676 (Home)

Comments:

He is not to go on outings with any one else per Mae Wilson.

Life Story:

Carl Brownfield

Zoomed

Click the Zoom Icon again to unZoom the Resident Detail Area.

Back Recent Forward Residents Activities Dashboard Reports Print Setup Help Log Off explore

Residents

New Import Delete
Show all current residents in all groups

Name	Group
Carl Brownfield	Willow (Dem...)
Mary Chambers	Willow (Dem...)
Tom Clouse	Evergreen (...)
Anna Crawford	Maple (Long...)
Brenda Dean	Evergreen (...)
Dale Dean	Maple (Long...)
Ruth Feldman	Maple (Long...)
Bill Fenton	Maple (Long...)
Janet Harrison	Maple (Long...)
Shirley Hart	Maple (Long...)
Robert Hinton	Willow (Dem...)
Laura Miller	Maple (Long...)
Hazel O'Sullivan	Willow (Dem...)
Charles Plumm...	Maple (Long...)
Steve Santini	Evergreen (...)

• "FirstName LastName" order
• "LastName, FirstName" order

Training System

Carl Brownfield Room 153

Male 86 (1/4/1920?) Willow (Dementia)

Call Carl's daughter re radio (Due 8/10/2006)

Cognitive Level: alert, oriented to person; Needs help locat...

Current Diagnosis: Alzheimers, COPD

Special Instructions: Has used cane as a weapon in the past. W...

Face Sheet Interests Participation Observations Progress Census To Do's

Show Summary section

Administrative: Mr. Carl Brownfield; Male; 86

Interests: Outing, Music, Spiritual, Physical, Cognitive

Personal: Other; Never Married

Lifestyle: Involved with Coon Hunters Assoc.

History: 8th grade/less; Veteran; Farmer

Care: alert, oriented to person; Has Diagnosis, Therapies and Sp...

Diet: mechanical soft

Precautions: Allergies, Elopement, Falls

Releases: Activities, Birthdate, Photo

Contacts: Mae Wilson: 414-354-6676 (Home)

UnZoomed

Resident Tabs

The lower part of the Resident Detail Area is called the “Resident Tabs”.

Residents

New Import Delete
Show all current residents in all groups

Name	Group
Carl Brownfield	Willow (Dem...)
Mary Chambers	Willow (Dem...)
Tom Clouse	Evergreen (...)
Anna Crawford	Maple (Long...)
Brenda Dean	Evergreen (...)
Dale Dean	Maple (Long...)
Ruth Feldman	Maple (Long...)
Bill Fenton	Maple (Long...)
Janet Harrison	Maple (Long...)
Shirley Hart	Maple (Long...)
Robert Hinton	Willow (Dem...)
Laura Miller	Maple (Long...)
Hazel O'Sullivan	Willow (Dem...)
Charles Plumm...	Maple (Long...)
Steve Santini	Evergreen (...)

• "FirstName LastName" order
• "LastName, FirstName" order

Training System

Resident Header

Carl Brownfield Room 153

Male 86 (1/4/1920?) Willow (Dementia)

Call Carl's daughter re radio (Due 8/10/2006)

Mobility: Cane; Very unsteady without use of the ca...

Current Diagnosis: Alzheimers, COPD

Special Instructions: Has used cane as a weapon in the past. W...

Face Sheet Interests Participation Observations Progress Census To Do's

Show Summary section

Resident Tabs

Administrative: Mr. Carl Brownfield; Male; 86

Interests: Outing, Music, Spiritual, Physical, Cognitive

Personal: Other; Never Married

Lifestyle: Involved with Coon Hunters Assoc.

History: 8th grade/less; Veteran; Farmer

Care: alert, oriented to person; Has Diagnosis, Therapies and Sp...

Diet: mechanical soft

Precautions: Allergies, Elopement, Falls

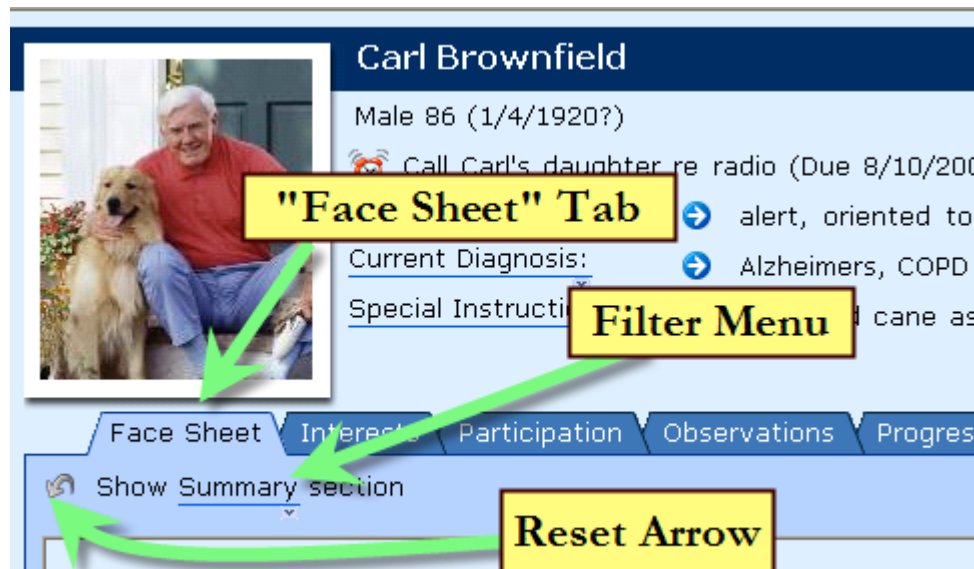
Releases: Activities, Birthdate, Photo

Contacts: Mae Wilson: 414-354-6676 (Home)

Each tab shows a different kind of information about the resident.

Face Sheet


Click on the “Face Sheet” tab to select it.



If your screen doesn't look like the picture above, click on the filter menu's reset arrow to make the Face Sheet show the “Summary” section.

You can also click on the underlined part of the filter menu and select “Summary” to show the Summary section.

Each one of the blue underlined words in the Summary section is a link that will show you more detail about that section.



Face Sheet | Interests | Participation | Observations | Progress | Census | To Do's

Show Summary section

Administrative: Mr. Carl Brownfield; Male; 86

Interests: Outing, Music, Spiritual, Physical, Cognitive

Personal: Other; Ne

Lifestyle: Involved v

History: 8th grade

Care: alert, oriented to person; Has Diagnosis, Therapies and Sp...

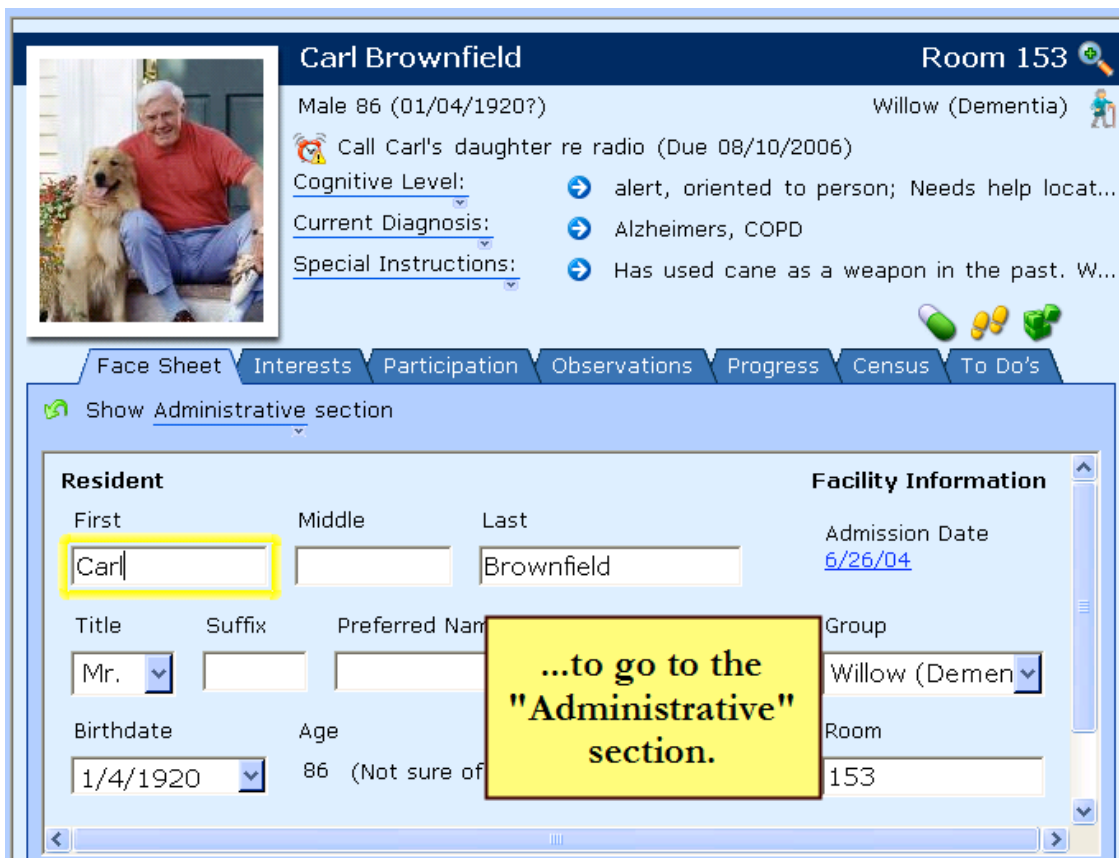
Diet: mechanical soft

Precautions: Allergies, Elopement, Falls

Releases: Activities, Birthdate, Photo

Contacts: Mae Wilson: 414-354-6676 (Home)

Click on "Administrative"...



Carl Brownfield Room 153

Male 86 (01/04/1920?) Willow (Dementia)

Call Carl's daughter re radio (Due 08/10/2006)

Cognitive Level: alert, oriented to person; Needs help locat...

Current Diagnosis: Alzheimers, COPD

Special Instructions: Has used cane as a weapon in the past. W...

Face Sheet | Interests | Participation | Observations | Progress | Census | To Do's

Show Administrative section

Resident

First: Carl Middle: Last: Brownfield

Title: Mr. Suffix: Preferred Name:

Birthdate: 1/4/1920 Age: 86 (Not sure of)


Facility Information

Admission Date: 6/26/04

Group: Willow (Demen)

Room: 153

...to go to the "Administrative" section.



Carl Brownfield

Room 153

Male 86 (01/04/1920?)

Willow (Dementia)

Call Carl's daughter re radio (Due 08/10/2006)

Cognitive Level:

→ alert, oriented to person; Needs help locat..

Current Diagnosis:

→ Alzheimers, COPD

Special Instructions:

→ Has used cane as a weapon in the past. W..

Face Sheet

Interests

Participation

Observations

Progress

Census

To Do's

Show Administrative section

Resident

First

Carl

Middle

Last

Brownfield

Title

Mr.

Suffix

Preferred

Birthdate

1/4/1920

Age

86 (Not sure of ☐ Day ☐ Month ☒ Year)

Facility Information

Admission Date

6/26/04

Group

Willow (Demen

Room

153

Click here...

Carl Brownfield Room 153

Male 86 (01/04/1920?) Willow (Dementia)

Call Carl's daughter re radio (Due 08/10/2006)

Cognitive Level: alert, oriented to person; Needs help locat...

Current Diagnosis: Alzheimers, COPD

Special Instructions: Has used cane as a weapon in the past. W...

Face Sheet | Summary | Administrative | Personal | Lifestyle | History | **Care** | Diet | Precautions | Releases | Contacts | Comments | Life Story

Resident Information

First Name: Carl Last Name: Brownfield

Title: Mr. Preferred Name:

Birthdate: 1/4/1920 86 (Not sure of ☐ Day ☐ Month ☒ Year)

Facility Information

Admission Date: 6/26/04

Group: Willow (Demen)

Room: 153

...to go to any other Face Sheet section

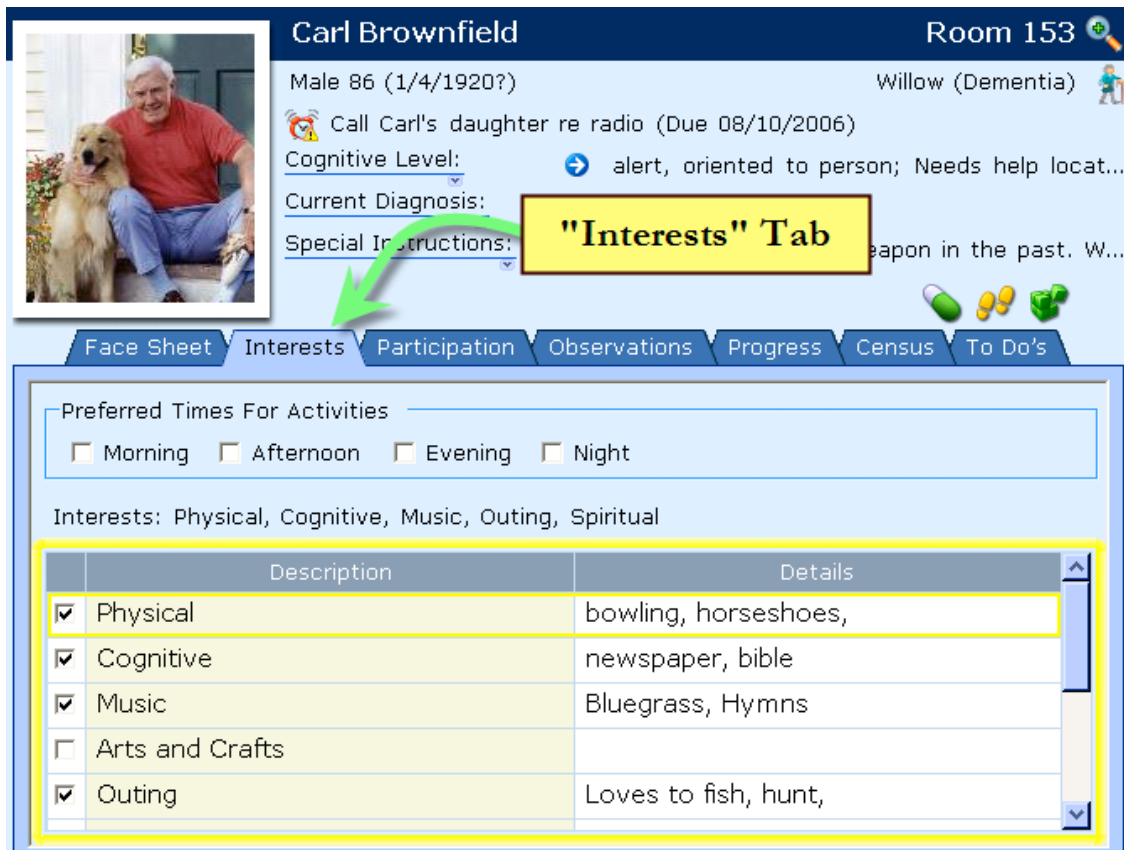
Click on each of the Face Sheet section names to explore all of the Face Sheet sections.

Important: ProActivity Reports allows you to track lots of different kinds of information about your residents, but you don't have to enter all of it to use the software. **All you really need to get started is each resident's name.**

Over time, you'll probably enter more information about your residents. The more you put in to the system, the more you'll get out of it.

Interests

Click on the "Interests" tab to select it.



Carl Brownfield Room 153

Male 86 (1/4/1920?) Willow (Dementia)

Call Carl's daughter re radio (Due 08/10/2006)

Cognitive Level: alert, oriented to person; Needs help locat...

Current Diagnosis:

Special Instructions:

"Interests" Tab

Face Sheet Interests Participation Observations Progress Census To Do's

Preferred Times For Activities

☐ Morning ☐ Afternoon ☐ Evening ☐ Night

Interests: Physical, Cognitive, Music, Outing, Spiritual

	Description	Details
<input checked="" type="checkbox"/>	Physical	bowling, horseshoes,
<input checked="" type="checkbox"/>	Cognitive	newspaper, bible
<input checked="" type="checkbox"/>	Music	Bluegrass, Hymns
<input type="checkbox"/>	Arts and Crafts	
<input checked="" type="checkbox"/>	Outing	Loves to fish, hunt,

You can use the Interests tab to indicate what kinds of activities interest this resident. You can also use the Interests tab to indicate what time of day this resident prefers for activities.

ProActivity Reports has several easy-to-use reports that let you get an overview of what your current residents are interested in as a group and what time of day would be best to ensure the most participation. You can use these reports to help you decide what kinds of activities to schedule and when to schedule them.

Participation

Click on the “Participation” tab to select it.

The screenshot displays the ProActivity Reports software interface for resident Carl Brownfield, Room 153. The resident's profile includes a photo, name, age (86), date of birth (1/4/1920?), gender (Male), and diagnosis (Willow (Dementia)). A green arrow points from the "Participation" tab to a yellow box labeled "Participation" Tab. The interface shows a calendar view for August 2006, displaying activities for each day. The activities are color-coded: blue for Group, orange for Appointment, green for 1:1, and yellow for Independent. The calendar shows various activities like "Ch...", "Ne...", "Cof...", "Mu...", "Pet...", "Bal...", "Da...", "Re...", "Ha...", "Mo...", "Ga...", "Ca...", "Re...", "Mu...", "Yo...", "Ne...", "Mall...", "Hap...", "Ice..." and "Mus...". The left sidebar contains options for "View" (Starting Date: 8/6/06, Day, Week, Month, Planner, List), "Activities" (New Independent Activity, New 1:1 Activity, New Resident Appointment, Remove From This Activity, View Participation), and "Display" (Verdana, 8, +, -).

Carl Brownfield Room 153
Male 86 (1/4/1920?) Willow (Dementia)
Call Carl's daughter re radio (Due 08/10/2006)
Cognitive Level: alert, oriented to person; Needs help locat...
Current Diagnosis: Alzheimers, COPD
Special Instructions: Has used

"Participation" Tab

Face Sheet Interests **Participation** Observations Progress Census To Do's

View
Starting Date: 8/6/06
Day Week Month
Planner List

Activities
+ New Independent Activity
+ New 1:1 Activity
+ New Resident Appointment
✗ Remove From This Activity
✎ View Participation

Display
Verdana 8 + -

Show All Events that this resident could participate in from All Calendars

August 2006

6	7	8	9	10	11	12
Ch...	Ne...	Cof...	Ne...	Cof...	Ne...	Mus...
Cat...	Mu...	Mu...	Mu...	Mu...	Yo...	Yog...
Mu...	Pet...	Pet...	Bal...	Pet...	Mu...	Ne...
	Mo...	Sn...	Pet...	Da...	Pet...	Mall...
	Re...	Ga...	Pet...	Re...	Re...	Hap...
	Ha...	Re...	Ca...	Ha...	Ha...	
		Ha...	Re...	Ha...	Ice...	
			Mo...			

Group Appointment 1:1 Independent

This tab shows you information about which activities this resident participated in.

The filter menus at the top of the tab let you control which activities are displayed. The background colors of each event tell you how actively the resident participated in each activity.

You can decide what the colors mean and what activity levels you want to track in the Setup section of ProActivity Reports. We'll cover that in more detail later.

You can mark a resident's participation level in an activity by double-clicking it.

Click twice on an activity.

The screenshot shows a window titled "Record Participation" with a blue header. Below the header, it says "News Views (News Views)" and "April 3, 2006 at 8:00 AM". The main area contains a table with columns for "Name", "Group", "Confirmed", and seven participation levels (0-7). The row for "Carl Brownfield" in the "Willow (Dementi..." group is highlighted. A mouse cursor is clicking on the "2" level, which is labeled "Independent...". Below the table is a "Comments" text area and buttons for "Edit", "Save", and "Cancel".

Name	Group	0 Confirmed	1 N/A	2 Independent...	3 Verbal Pr...	4 Physical P...	5 Passive	6 Disruptive	7 Refused
Carl Brownfield	Willow (Dementi...			✓					

A window opens that lets you mark this resident's participation level for this activity.

Click in the "Independent" box.

You've just told the system that this resident independently participated in this activity. You can also set participation levels by typing the number above each participation level. For example, to mark this resident as "Disruptive" in this activity, press the "6" key.

Click "Save" to record your changes and return to the Residents screen.

Observations

Click on the “Observations” tab to select it.

Tom Clouse Room 126
Male 77 (11/2/1928) Evergreen (Rehabilitation Unit)

Do Progress Notes for Tom Clouse (Due 8/21/2006)

Cognitive Level: alert, oriented to person, place and time; ...

Current Diagnosis: Total Hi

Special Instructions: Total Hi

"Observations" Tab

Face Sheet Interests Participation **Observations** Progress Census To Do's

Month: Aug 2006 Verdana 10

Activity	Δ	In	Total	1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17
Art (independent)																				
Bible Reading	x		2										2							
Computer Games	x		2	1								1								
Crafts			2		1	1														
Crosswords Indepe...	x		1		1															
Devotions	x		1	1												1				

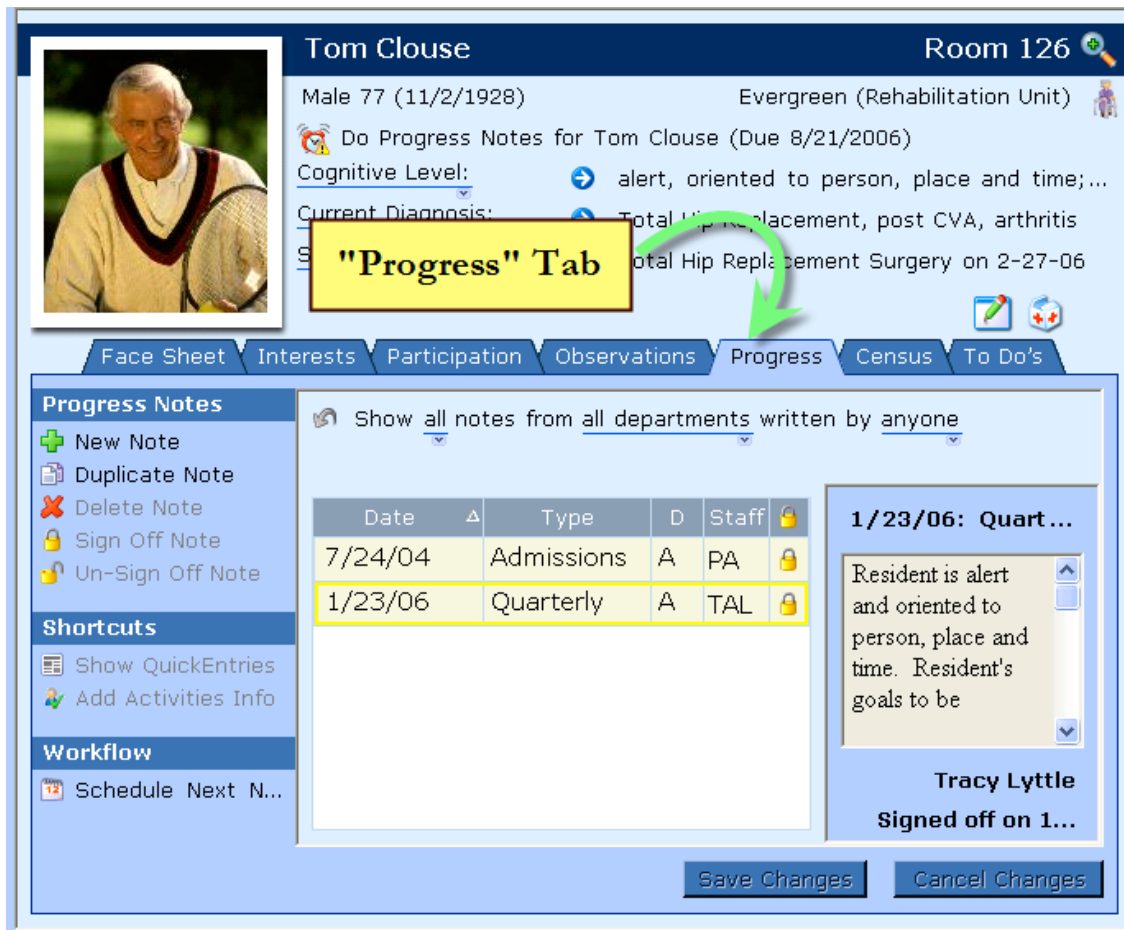
The “Observations” tab allows you to record unscheduled activities that the residents participate in that are less structured – and maybe more self-directed – than scheduled activities. For example, if a staff member observes a resident doing a crossword puzzle on his own, then that observation can be recorded here.

You can record how many times a resident was observed doing a particular activity by selecting the box that corresponds to the day and the activity, and then typing the number of times the resident was observed doing that activity that day.

In the example pictured above, this resident was observed playing computer games twice in the month of August, once on the 1st and once on the 10th.

Progress Notes

Click on the “Progress” tab to select it.



Tom Clouse Room 126

Male 77 (11/2/1928) Evergreen (Rehabilitation Unit)

Do Progress Notes for Tom Clouse (Due 8/21/2006)

Cognitive Level: alert, oriented to person, place and time;...

Current Diagnosis: Total Hip Replacement, post CVA, arthritis

S Total Hip Replacement Surgery on 2-27-06

"Progress" Tab

Face Sheet | Interests | Participation | Observations | **Progress** | Census | To Do's

Progress Notes

- + New Note
- + Duplicate Note
- Delete Note
- Sign Off Note
- Un-Sign Off Note

Shortcuts

- Show QuickEntries
- Add Activities Info

Workflow

- Schedule Next N...

Show all notes from all departments written by anyone

Date	Type	D	Staff	
7/24/04	Admissions	A	PA	
1/23/06	Quarterly	A	TAL	

1/23/06: Quart...

Resident is alert and oriented to person, place and time. Resident's goals to be

Tracy Lyttle
Signed off on 1...

Save Changes Cancel Changes

This tab lets you record Progress Notes about the resident.

You can create new notes for a resident using the “New Note” command from the command bar on the left side of this tab. You can also schedule a reminder to yourself to create a new progress note for this resident using the “Schedule Next Note” command.

There's a **shortcut** for writing notes built in to ProActivity Reports.

Click “Show QuickEntries” on the command bar on the left side of this tab while you have a Progress Note selected. (It must be a Note that hasn’t been signed off yet.)

The QuickEntry tool opens.

QuickEntry

This QuickEntry screen helps you enter text quickly and accurately. Pick a QuickEntry topic from the list on the left to display its entries. Double-clicking an entry copies it into the note on the right.

Show Progress Note Topics and Entries.

Topics	Entries
Cognitive Status	Resident is alert, but not oriented.
Goals	Resident is alert and oriented to person.
Group Activities	Resident is alert and oriented to person and place.
Behaviors	Resident is alert and oriented to person, place and time.
Extent of Invol...	Resident is alert and oriented with periods of forgetfulness.
Transportation	Resident is alert and oriented to self only.
Independent A...	Resident is alert with confusion to time and
Spiritual Activi...	
Family Involve...	
Discharge	
Admission	
Transfer	
Significant Cha...	

Tom Clouse
Admissions Progress Note
Saturday, March 27, 2004

Note

Resident admitted from hospital on 06/18/04 with diagnosis of CVA. Will place on 1:1 list for adjustment of placement as well as socialization. Assessment to follow.

Copy >> Save Cancel

The QuickEntry tool lets you build a library of frequently used sentences to quickly write progress notes. You can enter your own QuickEntries in the Setup section of ProActivity Reports.

Double-click “Resident is alert, but not oriented.” in the middle column.

The text is automatically entered into your progress note.

Click “Save” to record your changes and return to the Residents screen.

Census History

Click on the “Census” tab to select it.

Anna Crawford Room 109

Female 72 (1/3/1934) Maple (Long Term Care)

Take Anna shopping for frames (Due 8/17/2006)

Cognitive: Alert; Comatose since AA 1-30-06

Current Diagnosis: S/P Severe head trauma

Special Instructions: Side rails up at all times.

"Census" Tab

Face Sheet | Interests | Participation | Observations | Progress | **Census** | To Do's

Resident Status	
Date	Description
3/18/06	Admitted

Admitted From: Home

New: P Staff: PA

Resident Status Options:

- Admit
- Transfer Out
- Transfer Back In
- Discharge
- Re-Admit
- Deceased
- Delete Most Recent

Follow Up:

- New Progress Note

Save Changes Cancel Changes

This tab helps you track the in-house status of each resident.

When you first add a resident to your ProActivity Reports database, the system will automatically create an “Admitted” entry for the resident. If the resident later transfers out or is discharged, you can use this tab to keep track of the resident’s comings and goings.

To Do's

Click on the "To Do's" tab to select it.

The screenshot shows a patient profile for Carl Brownfield, Room 153. The profile includes a photo of an elderly man with a dog, and fields for Cognitive Level, Current Diagnosis, and Special Instructions. A yellow box labeled "To Do's" Tab with a green arrow points to the "To Do's" tab in the navigation bar. The "To Do's" tab is active, showing a list of tasks.

Carl Brownfield Room 153

Male 86 (1/4/1920?) Willow (Dementia)

Call Carl's daughter re radio (Due 8/10/2006)

Cognitive Level: alert, oriented to person; Needs help locat...

Current Diagnosis:

Special Instructions: a weapon in the past. W...

Face Sheet Interests Participation Observations Progress Census **To Do's**

To Do's

- + New To Do
- Edit To Do
- Delete To Do

Show My To Do's with Carl Brownfield

Show all categories flagged or due whenever that are done and not done.

		Subject	Staff
	<input type="checkbox"/>	Call Carl's daughter re radio	PA
	<input type="checkbox"/>	Care Plan	PA; JD

This tab lets you keep track of all the "To Do" tasks related to each resident.

To create a new To Do task, click the “New To Do” command on the command bar on the left of this tab. You can see more information about all of this resident’s To Do tasks by clicking the Zoom icon.

Click the Zoom icon in the upper right of this window. (It looks like a magnifying glass.)



Residents

Carl Brownfield Room 153 Willow (Dementia)

Face Sheet Interests Participation Progress Notes Census History To Do's

To Do's

- New To Do
- Edit To Do
- Delete To Do

Show My To Do's with Carl Brownfield

Show all categories flagged or due whenever that are done and not done.

Due Date	Subject	Resident	Staff
04/13/06	Call Carl's daughter re radio	Carl Brownfield	PA

To get more information about a specific To Do task, double-click it.

Click twice on the To Do task shown.

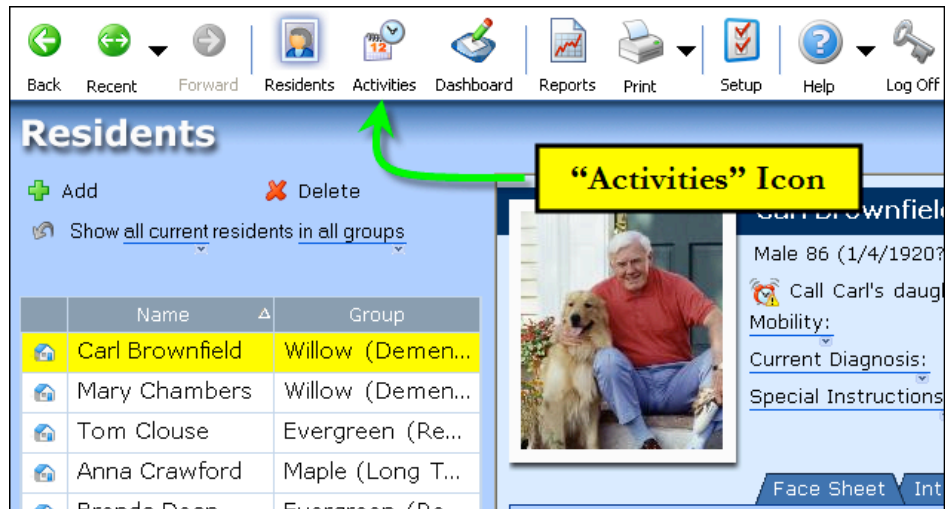
The screenshot shows a software window titled "Edit To Do". It features a "Title" field with the text "Call Carl's daughter re radio". Below the title is a "Done" checkbox. A tabbed interface has three tabs: "To Do" (selected), "Staff", and "Residents". Under the "To Do" tab, there is a "Due Date" dropdown set to "4/13/06" and a "Category" dropdown set to "Phone Call". Below these is a "Flag this To Do" checkbox and a numeric spinner set to "0" with the label "days before its due date". There are two buttons: "Staff" and "Residents". The "Staff" button is highlighted, and below it, the name "Paula Andersen" is displayed. The "Residents" button is also highlighted, and below it, the name "Carl Brownfield" is displayed. A "Comments:" label is above a large text area. At the bottom left, it says "Created by: Paula Andersen". At the bottom right, there are "Save" and "Cancel" buttons.

Click "Cancel" to return to the Residents screen.

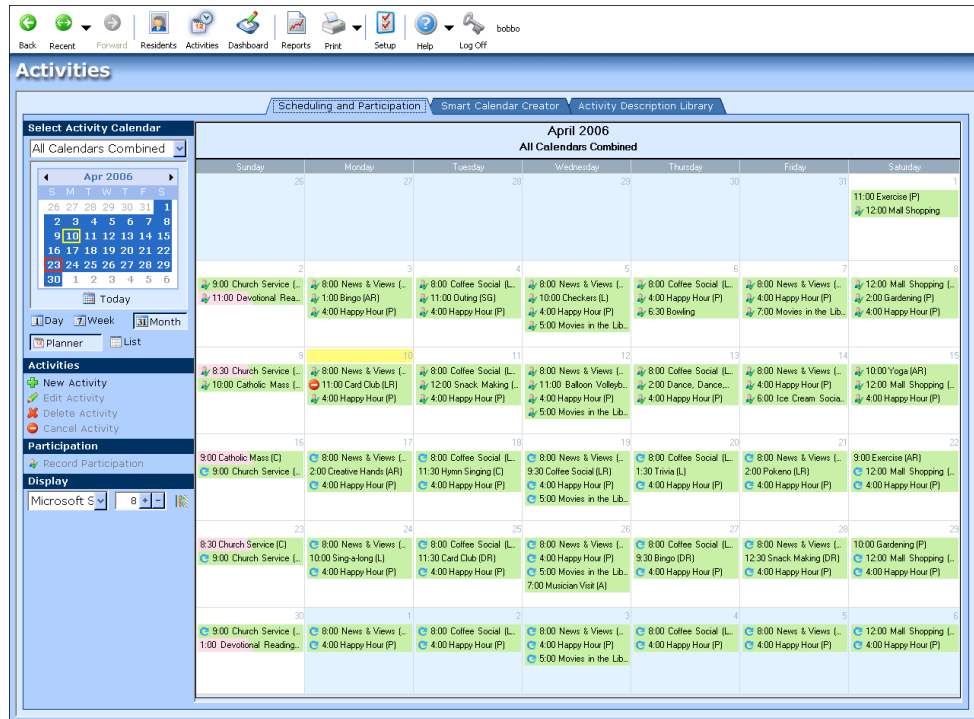
The “Activities” Screen

The next major area that we’ll explore is the “Activities” Screen. This part of the software lets you schedule your activities, record resident participation, and create the calendars that you’ll post in your facility and distribute to your residents.

Click the “Activities” icon on the main toolbar.



Clicking the Activities icon takes you to the Activities screen.



Let's make sure that we're both looking at the same screen. If your screen doesn't look like the picture above, click the "Activities" icon on the main toolbar and then click the "Scheduling and Participation" tab. Make sure that the "Month" and "Planner" views are selected by clicking those icons.

Back Recent Forward Residents Activities Dashboard Reports Print Setup Help Log Off explore

Activities

Training System

Scheduling and Participation Smart "Activities" Icon ns Activity Description Library

Select Activity Calendar

All Calendars Combined

Aug 2006

S M T W T F S

30 31 1 2 3 4 5

6 7 8 9 10 11 12

13 14 15 16 17 18 19

20 21 22 23 24 25 26

27 28 29 30 31 1 2

3 4 5 6 7 8 9

Today

1 Day 7 Week 31 Month

Planner List

Activities

- New Activity
- Edit Activity
- Delete Activity
- Cancel Activity

Participation

- Record Participation

Display

Verdana 10

August 2006

All Calendars Combined

2:00 Creati...	12:00 Pe...	1:00 Creati...	1:30 Trivia...	2:00 Poker...	4:00 Hap...
3:00 Re...	3:00 Re...	3:00 Re...	3:00 Re...	3:00 Re...	
4:00 Hap...	4:00 Hap...	4:00 Hap...	4:00 Hap...	4:00 Hap...	
		5:00 Mo...			
8:30 Churc...	8:00 ...	8:00 ...	8:00 Cof...	8:00 Ne...	10:00 Gard...
9:00 Chu...	8:30 ...	8:30 ...	8:30 Coffe...	10:00 M...	10:00 Mu...
10:00 M...	10:00 ...	10:00 ...	9:30 Bingo...	12:00 Pe...	12:00 Ma...
10:00 Sing...	12:00 Pe...	1:30 Water...	10:00 M...	12:30 Snac...	3:30 Pet Vis...
12:00 Pe...	1:00 Watch...	3:00 Re...	12:00 Pe...	3:00 Re...	4:00 Hap...
			3:00 Re...	4:00 Hap...	
			4:00 Hap...	4:00 Movie...	
9:00 Chu...	8:00 Ne...	8:00 Cof...	8:00 Ne...	8:00 Cof...	10:00 Mu...
10:00 M...	10:00 M...	10:00 M...	10:00 M...	10:00 M...	12:00 Ma...
1:00 Devot...	12:00 Pe...	12:00 Pe...	12:00 Pe...	12:00 Pe...	4:00 Hap...
	3:00 Re...	3:00 Re...	3:00 Re...	3:00 Re...	
	4:00 Hap...	4:00 Hap...	4:00 Hap...	4:00 Hap...	
		5:00 Mo...			

"Activities" Icon

"Scheduling and Participation" Tab

"Month" and "Planner" View

Scheduling and Participation

This screen shows all of the activities that you have planned for the month. You can view them a month at a time, a week at a time, or daily. You can view them in a graphic “Planner” view, or as a list.

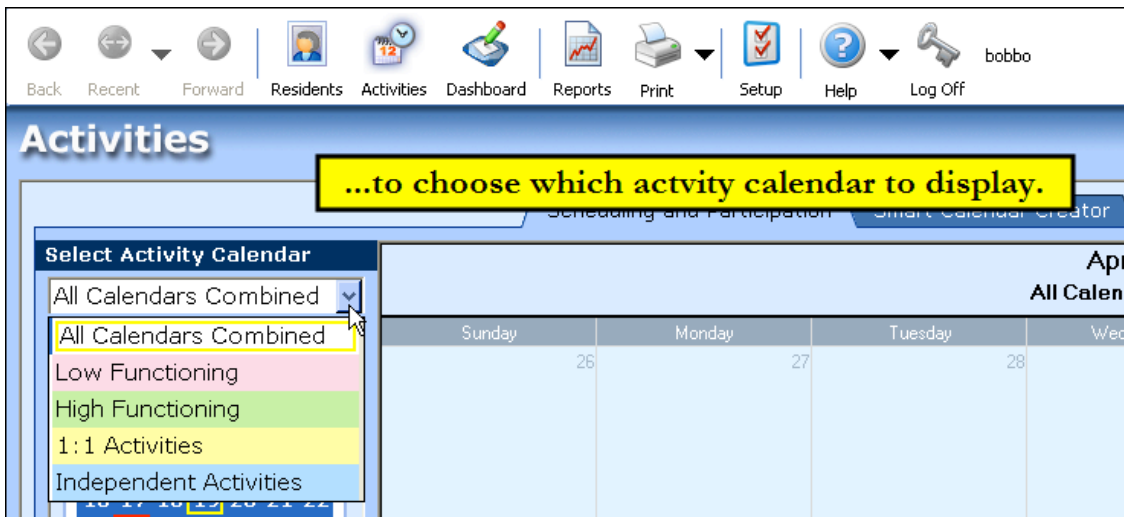
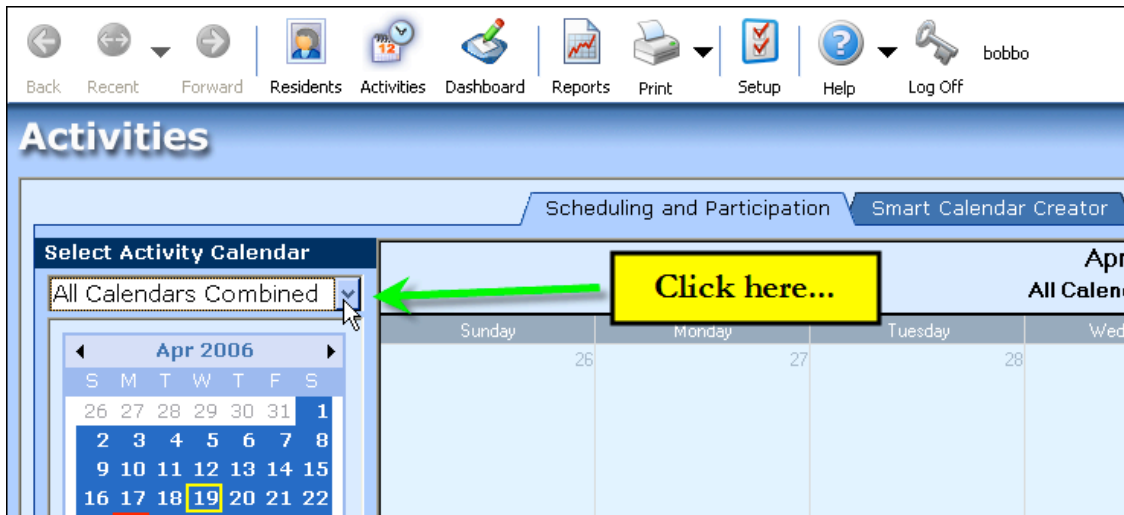
Click on the “Day”, “Week”, and “Month” buttons on the command bar on the left (under the small calendar).

Click on the “Planner” and “List” buttons.

When you’re done exploring the different formats available, click the “Month” and “Planner” icons to make your screen look like the picture above.

You can have several different activity calendars in your facility. For example, you might have one calendar for your high-functioning residents and another for your low-functioning residents. The Training System data is set up this way.

The “Scheduling and Participation” tab lets you look at activities on each of your calendars individually, or look at all of the activities from all of your activity calendars combined.



Choose “Low Functioning” from the Calendar Selector.

The software now shows you only the activities that are on the “Low Functioning” calendar.



Notice that the activities are color-coded. The activities that are on the “Low Functioning” calendar are shown in pink. Activities on the “High Functioning” calendar are shown in green.

In this example, the church services on Sunday are on both the High and Low Functioning calendars, so they’re shown in both pink and green.

You can create your own calendars and assign colors to them in the Setup section of the software. We’ll cover that later.

Creating New Activities

Click on the “New Activity” command icon. (It’s under the small calendar on the left.)

New Scheduled Activity

Activity Type: ☒ Group ☐ 1:1 ☐ Independent

Select Activity Description

Balloon Volleyball (Physical) Browse...

(Optional) Custom Title

Balloon Volleyball

Activity Repeat Staff Residents & Participation

Date: 8/6/06 Location: no location assigned

Start Time: 05:00 PM Cost: 0.00

End Time: 06:00 PM ☐ Cancelled ☐ Hide on Smart Calendar

Repeat Single instance

Staff Paula Andersen

Show this Activity on the checked Calendars

☒ Low Functioning ☐ High Functioning **Low Functioning**

Comments

Created by Paula Andersen

Save **Cancel**

This window lets you create new activities. You pick the activities Type (whether it’s a group activity, a one-to-one, or an independent activity) with the radio buttons at the top of the window.

You pick the activity description from the drop-down menu just below that, or you can click the browse button to see your whole library of activities. We’ll cover your Activity Description Library in a moment.

For now, just notice that you can use this window's tabs to make an activity repeat (like, say, Bingo every Wednesday at 3:00), and to assign facility staff to the activity.

The last tab lets you record resident participation.

Click the “Residents & Participation” tab.

The screenshot shows the 'New Scheduled Activity' form. At the top, the 'Activity Type' is set to 'Group'. The 'Select Activity' dropdown is set to 'Balloon Volleyball'. The 'Residents & Participation' tab is selected. Below the tabs, a filter menu shows 'Show all current residents in the "Maple (Long Term C..." group'. A table lists residents and their participation levels. The table has columns for 'Signed-Up', 'N/A', 'Independent...', 'Verbal P...', 'Physical P...', 'Passive', 'Disruptive', and 'Refused'. The 'Signed-Up' column is highlighted with a yellow box labeled '"Signed-Up" Column'. The 'Independent...' column is highlighted with a yellow box labeled 'Participation Levels'. A yellow box labeled '"Residents & Participation" Tab' points to the tab. A yellow box labeled 'Filter Menus' points to the filter menu.

		0	1	2	3	4	5	6	7
	Group	Signed-Up	N/A	Independent...	Verbal P...	Physical P...	Passive	Disruptive	Refused
Anna Crawford	Maple (L...		✓						
Dale Dean	Maple (L...		✓						
Ruth Feldman	Maple (L...		✓						
Bill Fenton	Maple (L...		✓						
Janet Harrison	Maple (L...		✓						
Shirley Hart	Maple (L...		✓						
Laura Miller	Maple (L...		✓						

This tab lets you record your residents' participation in each activity. Just click in the appropriate column to mark a resident's participation level for this activity. You can also type the number written above each participation level to record a residents' participation. For example, instead of clicking in the “Independent” box for a resident, you can click on the resident and type the number “2.”

Click in the “Verbal Prompts” box for Dale Dean.

	Name	Group	0 Signed-Up	1 N/A	2 Independ...	3 Verbal Pr...	4 Physical P...	5 Passive	6 Disruptive	7 Refused
	Anna Crawford	Maple (L...		✓						
	Dale Dean	Maple (L...				✓				

You can set up the software to use whatever participation levels you currently use in your facility in the Setup section of the software. We’ll cover that in more detail later.

Notice the “Signed-Up” column. You use this column to pre-schedule a resident for an activity. For example, if you’re having an outing to the mall on Friday and want to have residents sign up for it in advance, you’d record it here. Click in the “Signed-Up” column to indicate that a resident had reserved a space for the trip. In the following illustration, Anna Crawford has been “signed-up” for this activity.

	Name	Group	0 Signed-Up	1 N/A	2 Independ...	3 Verbal Pr...	4 Physical P...	5 Passive	6 Disruptive	7 Refused
	Anna Crawford	Maple (L...			✓					
	Dale Dean	Maple (L...		✓						

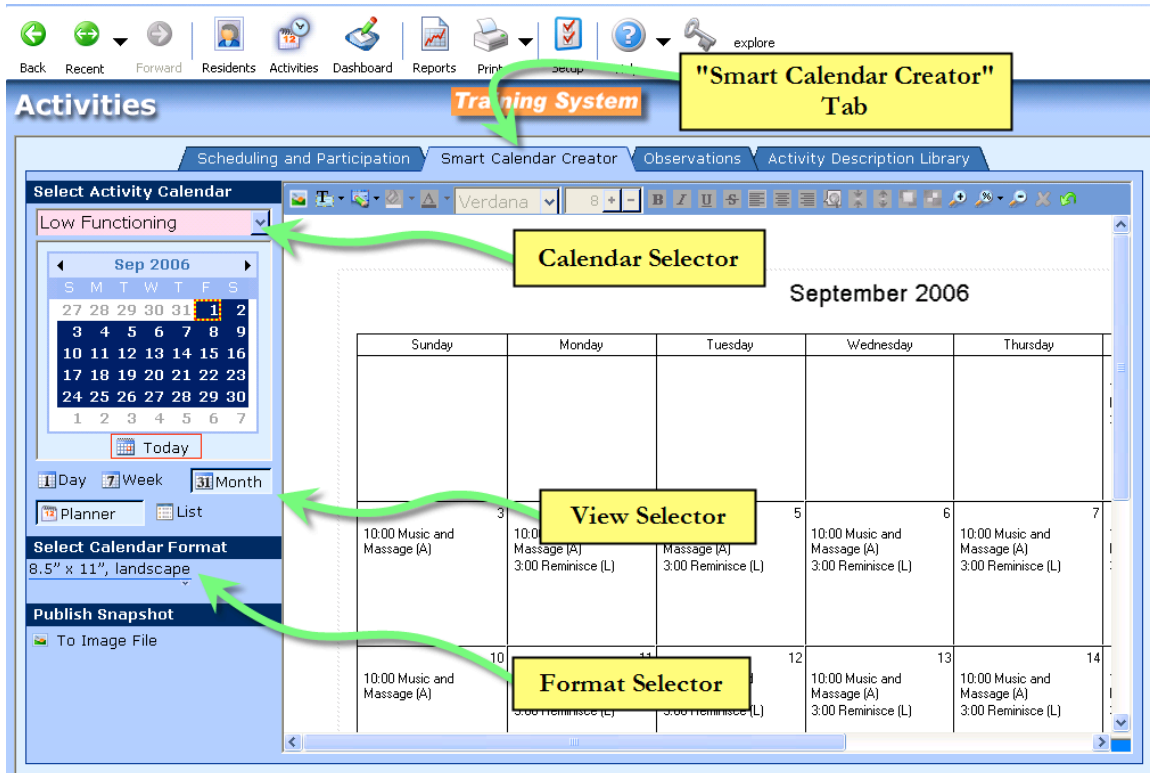
This window also uses filter menus to make recording participation faster and easier. Imagine that you’re recording participation for an activity from your Low Functioning calendar. You can use the filter menu to tell the software to only display residents from your low functioning group.

Show all current residents in the “Maple (Long Term C...” group

Click “Save” to save your new activity and return to the Activities window.

Smart Calendar Creator

Click on the “Smart Calendar Creator” tab.



This tab helps you create the graphic calendars that you'll give out to your residents and post in your facility.

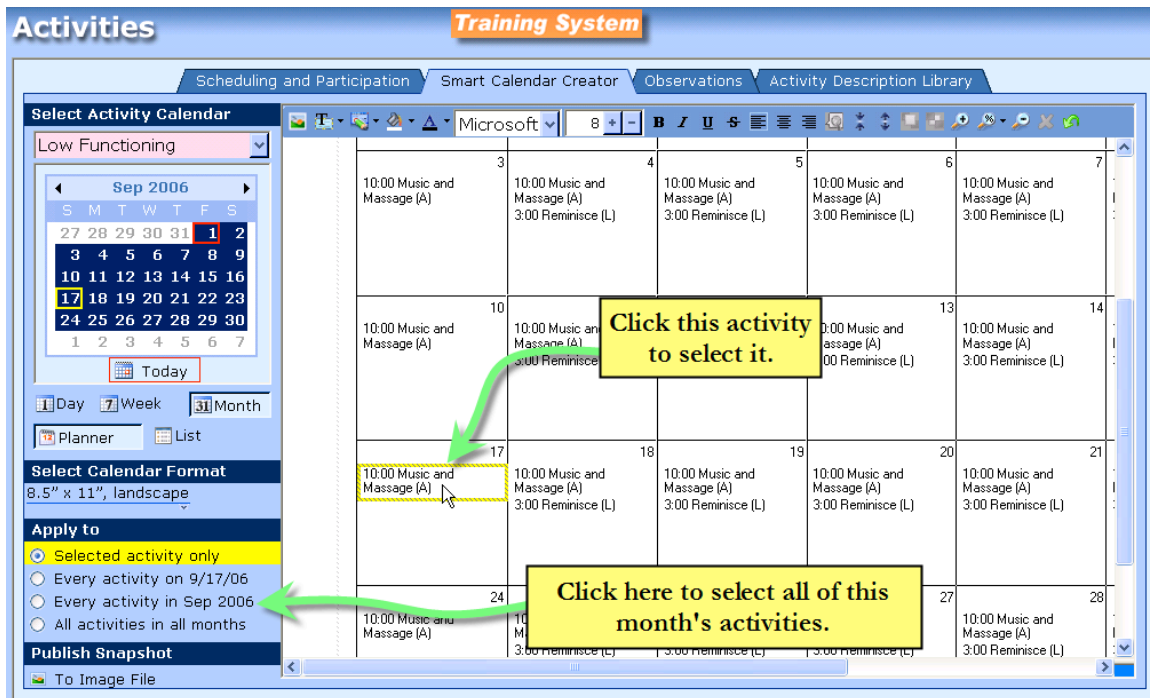
It automatically takes all the activity information that you created in the “Scheduling and Participation” tab and puts it in a graphic format that you can dress up with fonts, colors, and pictures. It's a lot like Calendar Creator – only smarter. When you make changes to your activity schedule on the “Scheduling and Participation” tab, your graphic calendar is automatically updated.

You can create daily, weekly, and monthly calendars, in List and Planner styles. You can make calendars for several different paper formats, from 8 ½ by 11 inches to two feet by three feet.

From the Calendar Selector, choose “Low Functioning”.
From the View Selector, choose “Month” and “Planner”.
From the Format Selector, choose ‘8.5” x 11”, landscape’.

You can control the fonts, styles, and colors of your calendar. Let's start by setting the font for all of the activities for this month.

Click an activity to select it.



Notice that the "Apply To" radio buttons appear once you've selected an activity. They control which calendar items you'll affect with your formatting commands.

Click the "Every Activity in September 2006" radio button.

Notice that all of this month's activities are now selected.

Change the font for the selected activities to Garamond 9 Bold

Activities **Training System**

Scheduling and Participation Smart Calendar Creator Observations Activity Description Library

Select Activity Calendar

Low Functioning

Sep 2006

27 28 29 30 31 1 2
3 4 5 6 7 8 9
10 11 12 13 14 15 16
17 18 19 20 21 22 23
24 25 26 27 28 29 30
1 2 3 4 5 6 7

Today

Day Week Month

Planner List

Select Calendar Format

8.5" x 11", landscape

Apply to

☐ Selected activity only

☐ Every activity on 9/3/06

☒ Every activity in Sep 2006

☐ All activities in all months

Publish Snapshot

To Image File

Garamon 9 B I U S

September 2006

Sunday Monday Tuesday Wednesday Thursday

10:00 Music and Massage (A) 10:00 Music and Massage (A) 10:00 Music and Massage (A) 10:00 Music and Massage (A) 10:00 Music and Massage (A)

3:00 Reminisce (L) 3:00 Reminisce (L) 3:00 Reminisce (L) 3:00 Reminisce (L) 3:00 Reminisce (L)

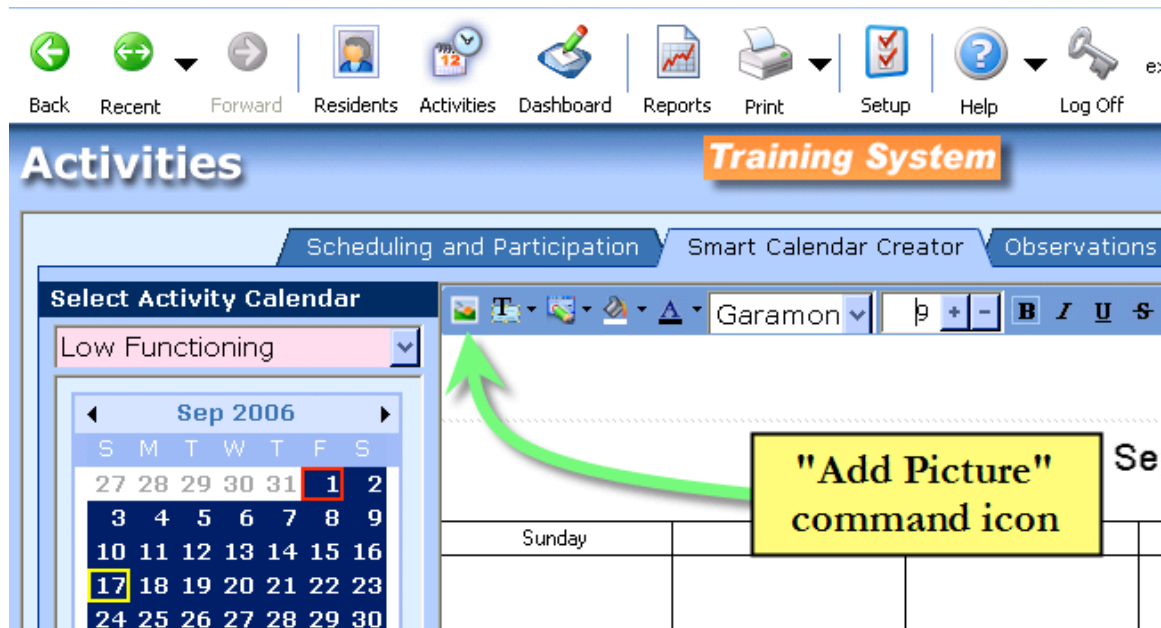
10:00 Music and Massage (A) 10:00 Music and Massage (A) 10:00 Music and Massage (A) 10:00 Music and Massage (A) 10:00 Music and Massage (A)

3:00 Reminisce (L) 3:00 Reminisce (L) 3:00 Reminisce (L) 3:00 Reminisce (L) 3:00 Reminisce (L)

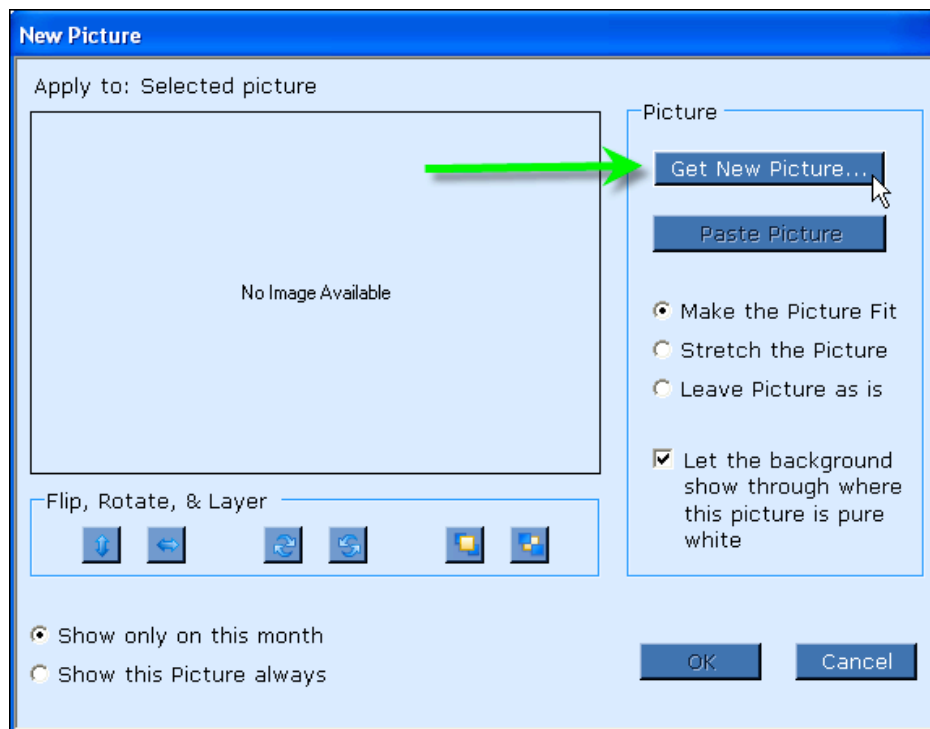
These command icons control how text appears.

Now we'll add a picture to your calendar.

Click the “Add Picture” command icon in the toolbar at the top of the tab.

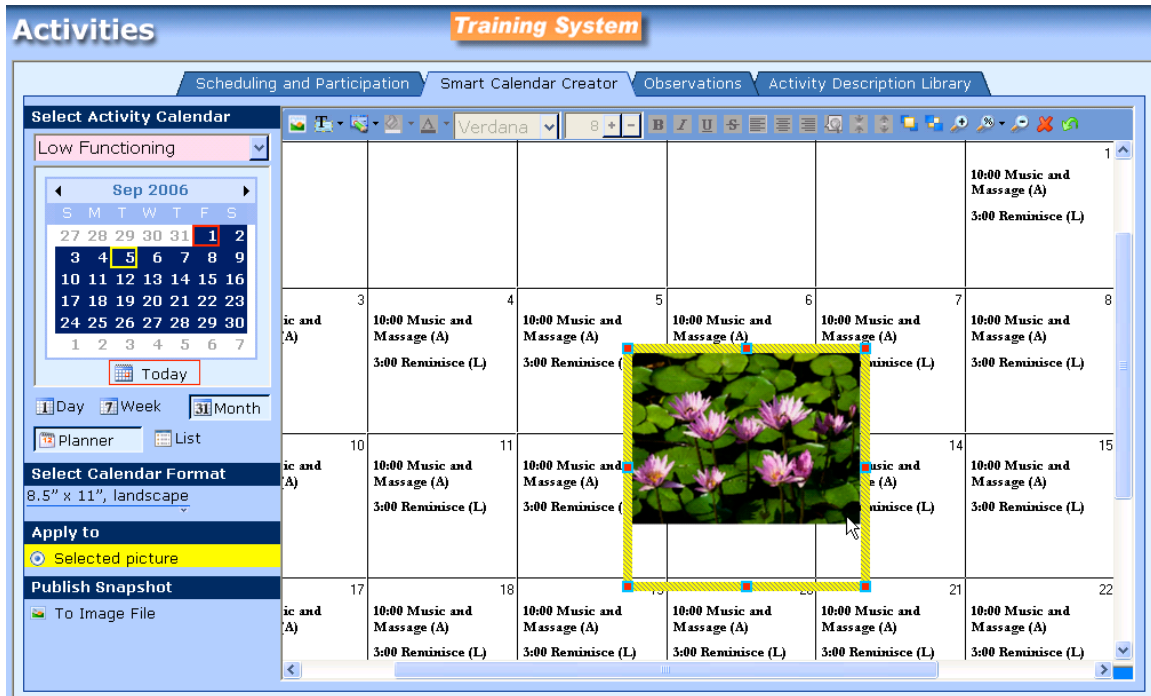


In the “New Picture” dialog that appears, click the “Get New Picture...” button.



Navigate to your “My Pictures” folder and select a picture file.

The picture is added to your calendar. You can drag it around and resize it.



Observations

Click on the “Observations” tab.

Activities **Training System** **"Observations" tab**

Scheduling and Participation Smart Calendar Creator **Observations** Activity Description Library

Show all current residents in all groups **Filter Menu**

Observation Date 9/1/06 Verdana 10

Sep 1, 2006

Name	Group	Total	Art (Independent)	Bible Reading	Computer Games	Crafts	Crosswords Independent	Devotions	Internet Use	Library Outreach	Music Recordings	Pet Care	Puzzles Jigsaw	Radio Spiritual	Radio Sports	Spiritual Tapes	Talking Books	TV for entertainment	Write letters/cards
Carl Brownfield	Willow (Deme...	2			1			1											
Mary Chambers	Willow (Deme...	1				1													
Tom Clouse	Evergreen (R...	2					1						1						
Anna Crawford	Maple (Long...	1	1																
Brenda Dean	Evergreen (R...	1							1										
Dale Dean	Maple (Long...																		

"Observable" activities

Save Changes Cancel Changes

The “Observations” tab records participation for activities that are unscheduled and self-directed. These activities include things like doing crossword puzzles and writing letters. Residents often participate in these activities but they do not take place in structured, scheduled events like group or 1:1 activities.

“Observations” are for less structured, more informal self-directed activities that your facility staff observe your residents engaging in. For example, if a staff member sees Edith reading in the library, you’d record that as an Observation. Or if Carl and Esther are seen playing cards on their own in the activity room, that would be recorded as an Observation.

The Observation system was inspired by the new CMS interpretive guidelines. State surveyors now want us to keep track of what residents are doing on their own, not just in structured activities, as part of the new “Person Appropriate” care model. The guidelines also stress that monitoring resident activities is now the responsibility of the whole facility, not just the activity department. To help you with this, ProActivity Reports will let you print out Observation Worksheets that you can distribute around your facility to help the entire facility staff record resident Observations.

List of Observable Activities														
Sep 1, 2006														
Write letters/cards	walking	TV for entertainment	Talking Books	Spiritual Tapes	Read Books	Radio Sports	Radio Spiritual	Puzzles Jigsaw	Prayer (Independent)	Pet Care	Music Recordings	Library Outreach	Internet Use	Devotions
Crosswords Independent	Crafts	Computer Games	Bible Reading	Art (Independent)										

Only those activities that you mark as “Observable” will show up in the Observation reports. Since ProActivity Reports ships with over 150 predefined activities, and including them all in the Observation reports would make the reports unmanageably large, it’s necessary to identify which activities you’d like to include. For example, you probably don’t want to make activities like Bingo “Observable”, because that’s usually a structured, scheduled event that you’d use the “Record Participation” mechanism to track. On the other hand, self-directed activities like “Internet Use” are prime candidates for resident Observation.

To mark an activity as “Observable”, go to the “Activity Description Library”, select the activity, and click the “Observable” checkbox on the “Details” tab.

Sep 1, 2006																
	Name	Group	Total	Art (Independent)	Bible Reading	Computer Games	Crafts	Crosswords Independent	Devotions	Internet Use	Library Outreach	Music Recordings	Pet Care	Prayer (Independent)	Puzzles Jigsaw	Radio Spiritual
	Carl Brownfield	Willow (Deme...	2			1			1							
	Mary Chambers	Willow (Deme...	1				1									
	Tom Clouse	Evergreen (R...	2					1							1	
	Anna Crawford	Maple (Long...	1		1											
	Brenda Dean	Evergreen (R...	1							1						

To record an Observation, go to the Observations tab and click on the square that corresponds to the resident that was observed and the activity he was observed doing. After you have clicked on the square, you can type in the number of times the resident was observed engaging in that activity for the day. In the example picture above, a staff member observed Tom Clouse participating in two of these self-directed, observable activities on September 1st. The staff member saw him doing a crossword puzzle and a jigsaw puzzle that day, so she entered “1” for Tom Clouse for each of those activities.

Activity Description Library

Click on the “Activity Description Library” tab.

Back Recent Forward Residents Activities Dashboard Reports Print Setup Help Log Off explore

Activities **Training System**

Scheduling and Participation Smart Calendar Creator Observations **Activity Description Library**

New Delete Schedule

Show all activity descriptions of any type in all interest categories

Filter Menu

Activity	Interest Category
1:1 Visits	Cognitive
Activity S...	Cognitive
Animal Bi...	Cognitive
Armchair...	Cognitive
Art (...	...
Balloon	...
Beanbag	...
Bell C...	...
Bible Read...	Spiritual
Bible Stud...	Spiritual
Bingo	Cognitive
Book Club	Cognitive
Export	Import

Activity Description List

Name: 1:1 Visits

Details Notes

Activity Type

☐ Group Activity ☐ Observable

☒ 1:1 Activity

☐ Independent Activity

Interest Category: Cognitive MDS Classification: Talking or conversing

Description: 1:1 conversation for current events, reminiscing, psychological support, spiritual support, comfort, cards, games, etc., between a staff member or volunteer and a resident.

Save Changes Cancel Changes

This tab shows your library of activity descriptions. You'll pull from this library when you're scheduling activities on the “Scheduling and Participation” tab.

The left part of the tab is the activity description list. When you select an activity description from this list, its details are displayed in the “Details” tab on the right.

In the “Details” tab, there is an option for making an activity “observable.” If you check the box labeled “Observable,” then this activity will appear on your list of activities in the “Observations” tab.

The screenshot shows a software interface with a top navigation bar containing four tabs: 'Observation', 'Smart Calendar Creator', 'Observations', and 'Activity Description Library'. The 'Activity Description Library' tab is active. Below the navigation bar, there is a form for editing an activity. The form has a 'Name' field at the top containing 'Art (independent)'. Below the name field, there are two sub-tabs: 'Details' and 'Notes'. The 'Details' tab is selected. In the 'Details' tab, there are several fields: 'Activity Type' with three radio button options: 'Group Activity' (with a group icon), '1:1 Activity' (with a 1:1 icon), and 'Independent Activity' (with a single person icon and selected); 'Interest Category' with a dropdown menu showing 'Arts and Crafts'; 'MDS Classification' with a dropdown menu showing 'Crafts/Arts'; and a checkbox labeled 'Observable' which is checked. At the bottom of the form is a 'Description' field containing the text 'Drawing/painting independently.'

Below the list are commands for importing and exporting your activity descriptions. You can share them with colleagues over the Internet.

Above the list are commands for creating new activity descriptions and deleting them from the library, as well as a “Schedule” command that’s a shortcut for scheduling an instance of the currently selected activity.

Click the “Notes” tab. (It’s to the right of the “Details” tab.)

The screenshot shows the 'Activities' window in the 'Training System'. The window has a blue header with the title 'Activities' and a sub-header 'Training System'. Below the header is a navigation bar with tabs: 'Scheduling and Participation', 'Smart Calendar Creator', 'Observations', and 'Activity Description Library'. The 'Activity Description Library' tab is active. On the left side, there is a toolbar with icons for 'New', 'Delete', and 'Schedule', and a text box that says 'Show all activity descriptions of any type in all interest categories'. Below this is a table with two columns: 'Activity' and 'Interest Category'. The table lists various activities and their categories. The '1:1 Visits' activity is highlighted in yellow. On the right side, there is a form for editing the selected activity. The form has a 'Name' field at the top, which contains '1:1 Visits'. Below the name field are two tabs: 'Details' and 'Notes'. The 'Notes' tab is selected. The 'Notes' tab contains several sections: 'Goals', 'Materials', 'Skills Needed', 'Problems / Adaptations', 'Instructions', 'Source', and 'Budget'. The 'Goals' section contains two text boxes: 'Promote social interaction.' and 'Provide mental stimulation to'. The 'Materials' section contains a text box with 'Reading materials, pictures, writing materials, discussion questions, trivia or games.' The 'Skills Needed' section contains a text box with 'verbal skills, social skills, hearing'. The 'Problems / Adaptations' section contains a text box with 'Low verbal skills - adapt questions to simple answer or yes/no'. The 'Instructions' section contains a text box with 'Knock on the resident's door. Introduce self/greet resident. Offer activity and explain as needed. Encourage resident participation by asking'. The 'Source' section contains a text box with 'ProActivity Reports'. The 'Budget' section contains a text box with '0.00' and a green arrow pointing to it. At the bottom right of the form are two buttons: 'Save Changes' and 'Cancel Changes'.

Activity	Interest Category
1:1 Visits	Cognitive
Activity S...	Cognitive
Animal Bi...	Cognitive
Armchair...	Cognitive
Art (indep...	Arts and Crafts
Balloon Vo...	Physical
Bean Bag...	Physical
Bell Choir	Music
Bible Read...	Spiritual
Bible Stud...	Spiritual
Bingo	Cognitive
Book Club	Cognitive

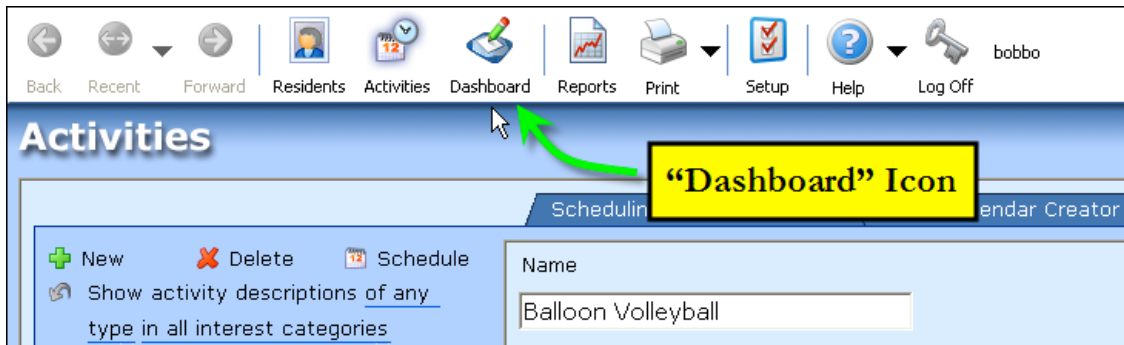
This tab let’s you describe the detailed notes for each activity. You can print the activity notes (using the “Print” icon on the main toolbar at the top of the screen) and give them to your staff who need instructions on how to run an activity.

Also notice the “Budget” field at the bottom of the tab. You can enter a dollar amount here that reflects what it costs to run each activity. ProActivity Reports will automatically total up the costs of your planned activities to help you with your monthly budgets.

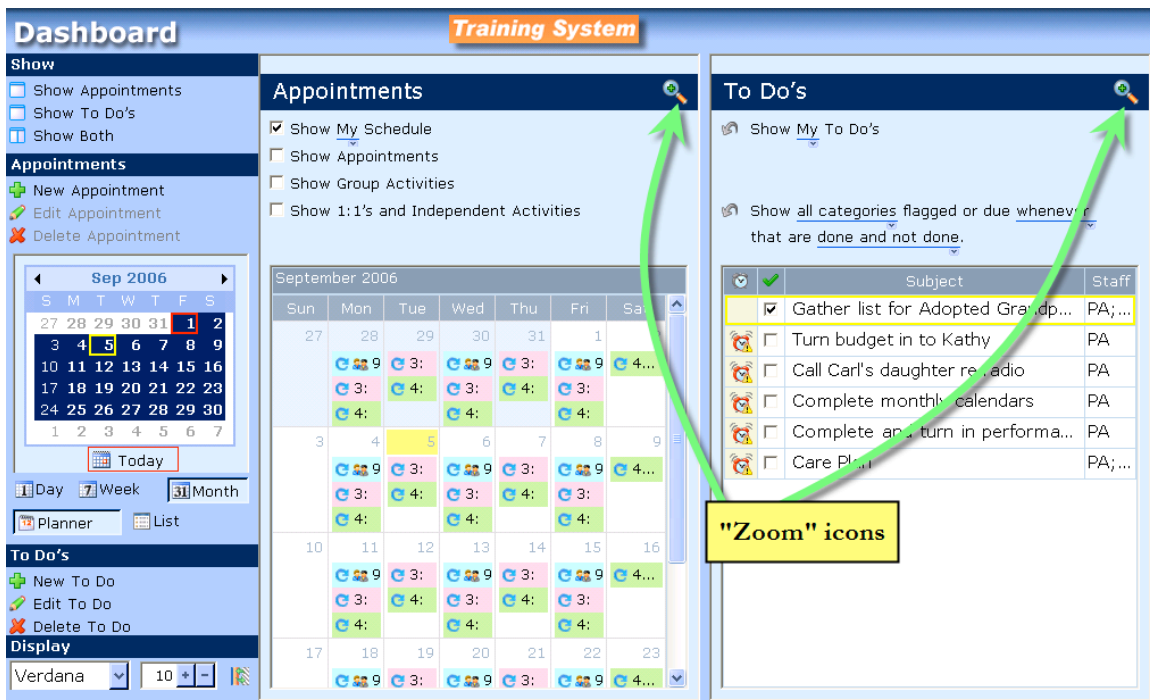
The “Dashboard” Screen

The next major area that we’ll explore is the “Dashboard” Screen. This part of the software helps you run the day-to-day operations of your Activity Department. It tracks appointments and To Do tasks for you and your staff.

Click the “Dashboard” icon on the main toolbar.



Clicking the Dashboard icon takes you to the Dashboard screen.

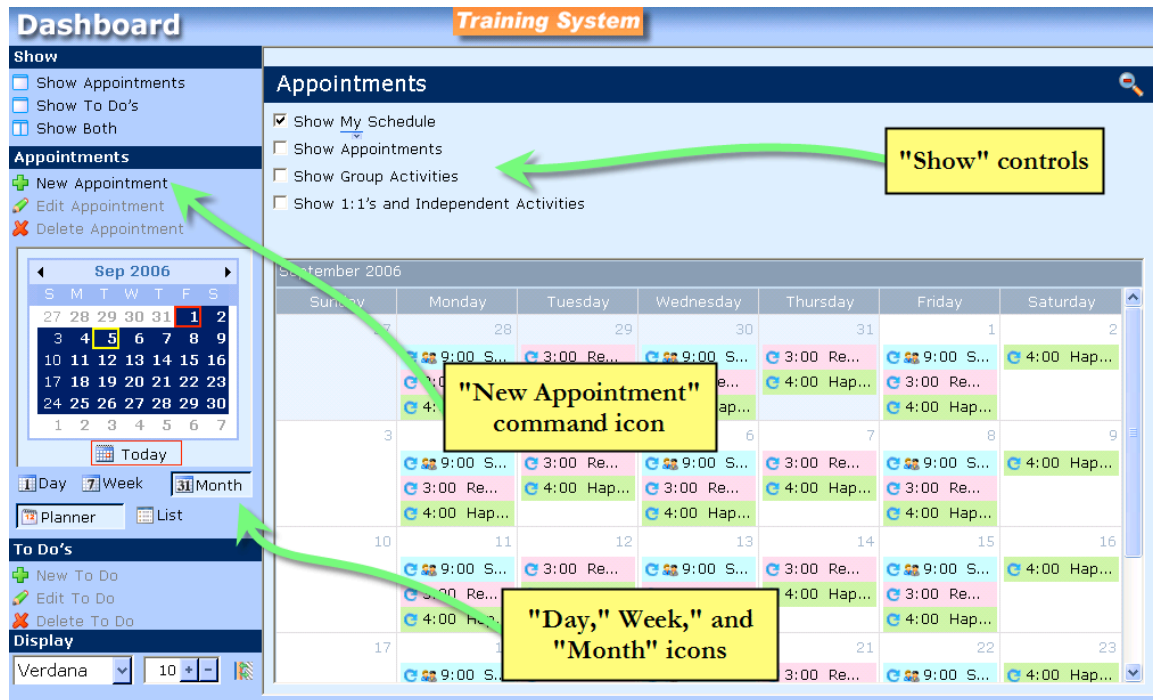


The dashboard screen is shared by your appointments and your To Do's. You can focus on one or the other by clicking its Zoom icon.



Appointments

Click the “Zoom” icon to the right of the word “Appointments” to zoom the screen to show your appointments.



This view shows your schedule. You can control what kind of events appear on your schedule with the “Show” controls at the top of the screen. You can also use this screen to see your individual staff members’ schedules.

You can view your daily, weekly, or monthly schedule by clicking the icons below the small calendar on the command bar on the left.

You can create new appointments by clicking the “New Appointment” command icon on the command bar on the left.

To Do's

Click on the “Show To Do’s” command icon near the top of the command bar on the left.

The “To Do” screen appears.

Dashboard **Training System**

Show

- Show Appointments
- Show To Do's
- Show Both

Appointments

- New Appointment
- Edit Appointment
- Delete Appointment

Calendar

Sep 2006

1 2 3 4 5 6 7 8 9 10 11 12 13 14 15 16 17 18 19 20 21 22 23 24 25 26 27 28 29 30

Today

Day Week Month

Planner List

To Do's

- New To Do
- Edit To Do
- Delete To Do

Display

Verdana 10

To Do's

Show My To Do's

Show all categories flagged or due whenever that are done and not done.

Filter Menus

	Due Date	Subject	Resident	Staff
<input checked="" type="checkbox"/>	08/01/06	Gather list for Adopted Grandpare...		PA; T...
<input type="checkbox"/>	08/08/06	Turn budget in to Kathy		PA
<input type="checkbox"/>	08/10/06	Call Carl's daughter re radio	Carl Brownfield	PA
<input type="checkbox"/>	08/25/06	Complete monthly calendars		PA
<input type="checkbox"/>	08/27/06	Complete and turn in performance...		PA
<input type="checkbox"/>	08/31/06	Care Plan	Carl Brownfield	PA; JD

"New To Do" command icon

This screen shows your To Do items.

You can control which items to display using the filter menus in the top part of the screen.

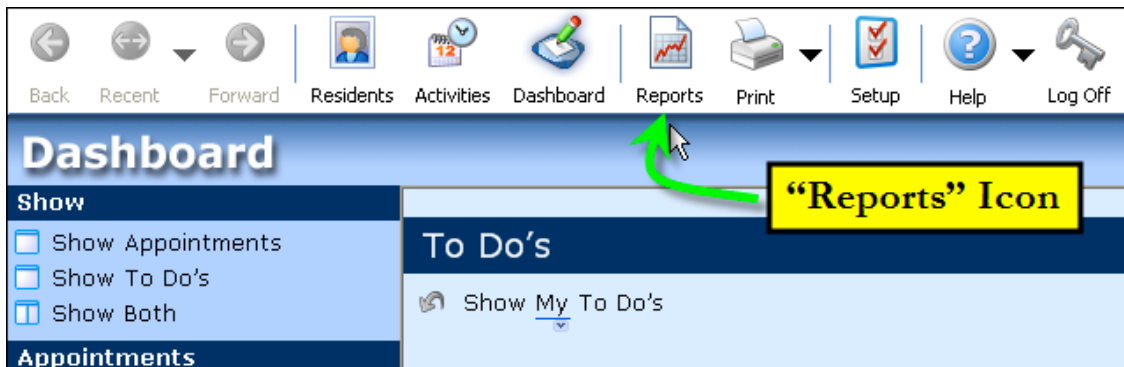
For To Do's that are associated with a specific resident, you can click on the resident's name and you'll be taken to that resident's detailed information in the Residents section.

To create a new To Do, click the “New To Do” command icon on the command bar on the left.

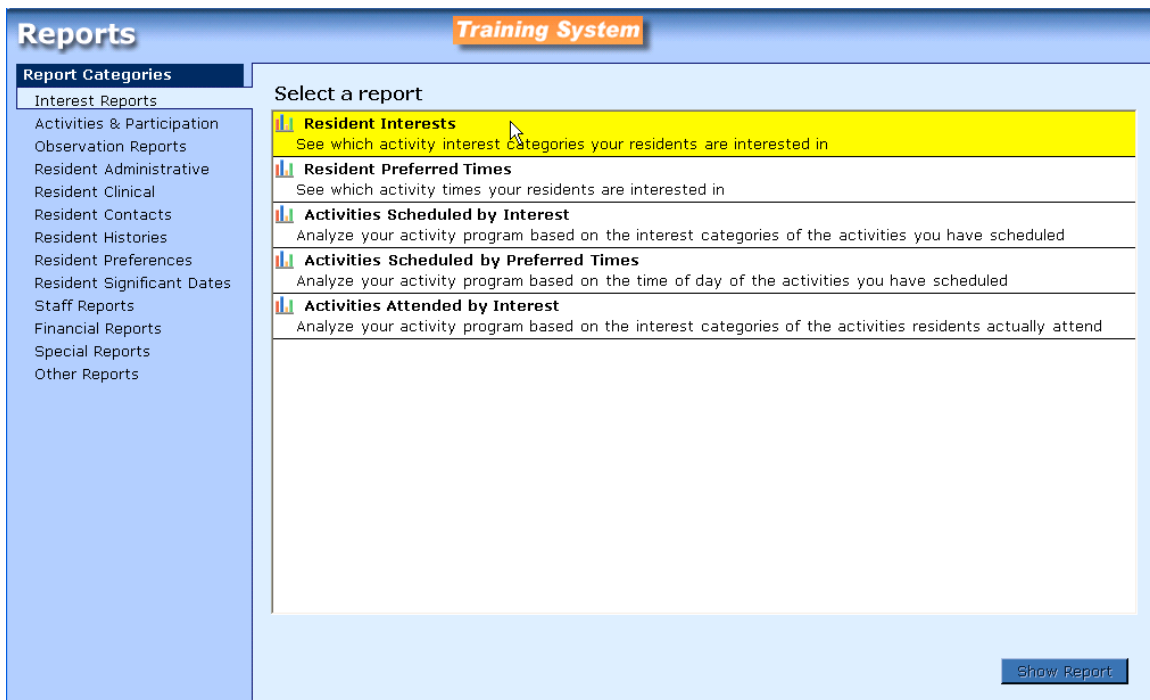
The “Reports” Screen

The next major area that we’ll explore is the “Reports” Screen. ProActivity Reports offers dozens of reports that will help you professionally manage your Activity Department.

Click the “Reports” icon on the main toolbar.



The “Reports” screen appears.

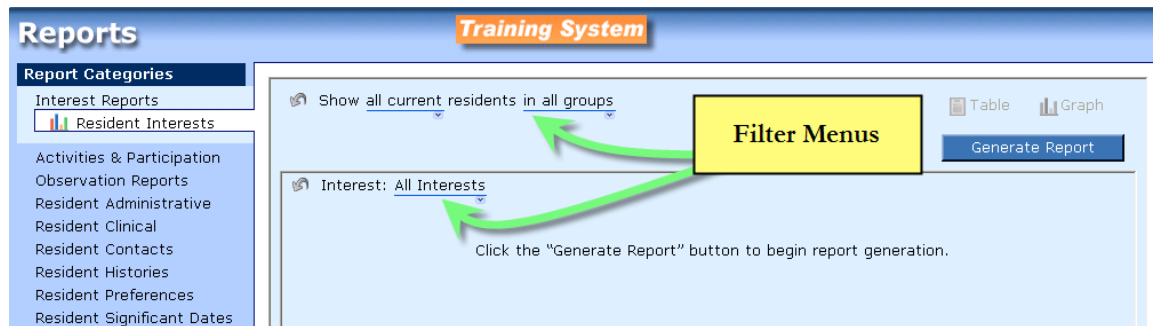


The blue bar on the left of the screen lists the report categories.

Click on “Interest Reports”, the first item listed under “Report Categories”.

When you click on a report category in the list on the left, all of the reports in that category appear in the list on the right.

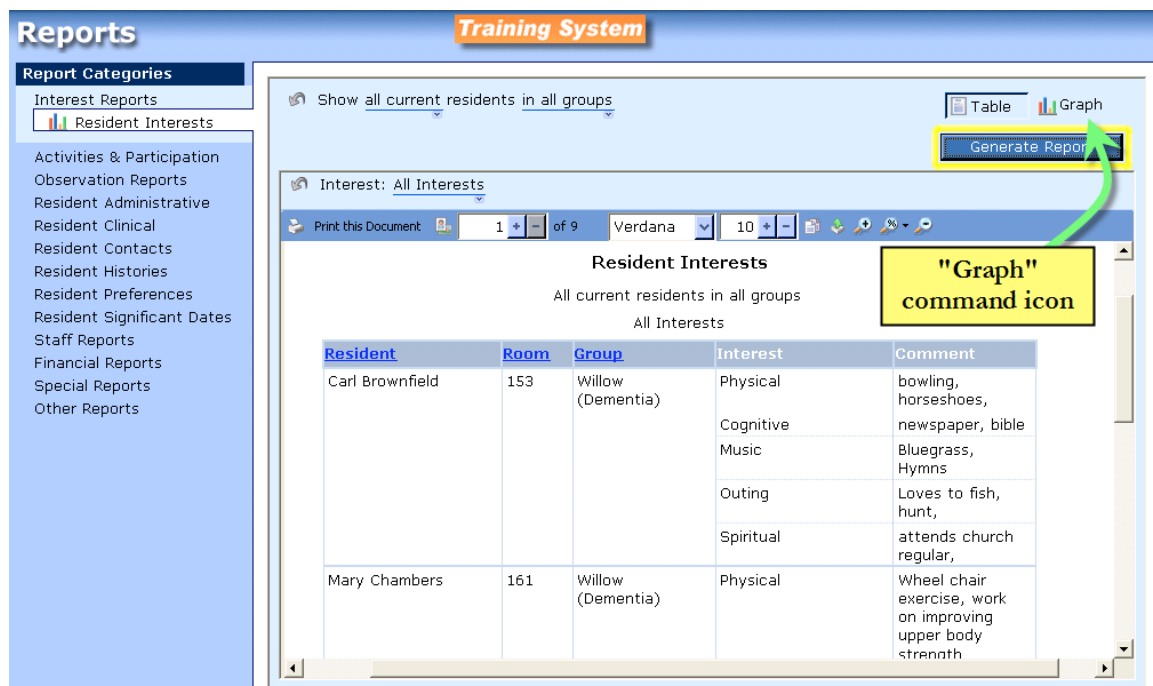
Click on “Resident Interests” in the list on the right.
Click the “Show Report” button in the lower right corner of the screen.



You can control which information is displayed in each report by using the filter menus at the top of the screen.

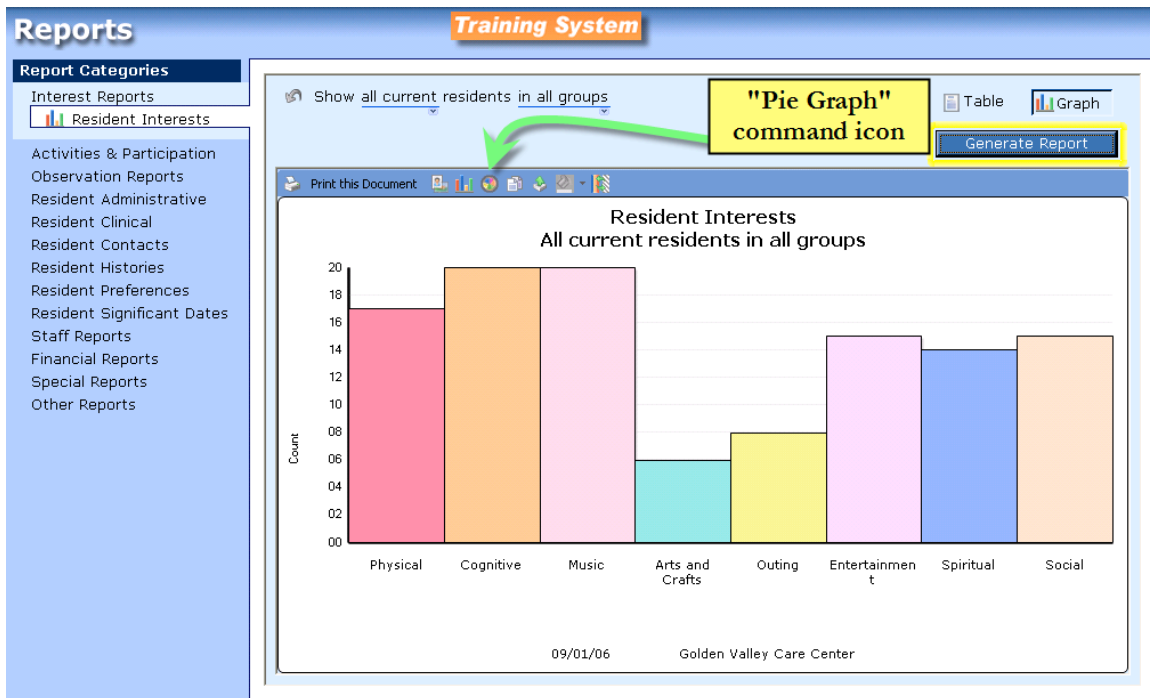
Click the “Generate Report” button in the upper right.

The report appears. In this case it’s a tabular listing of each resident’s interests.



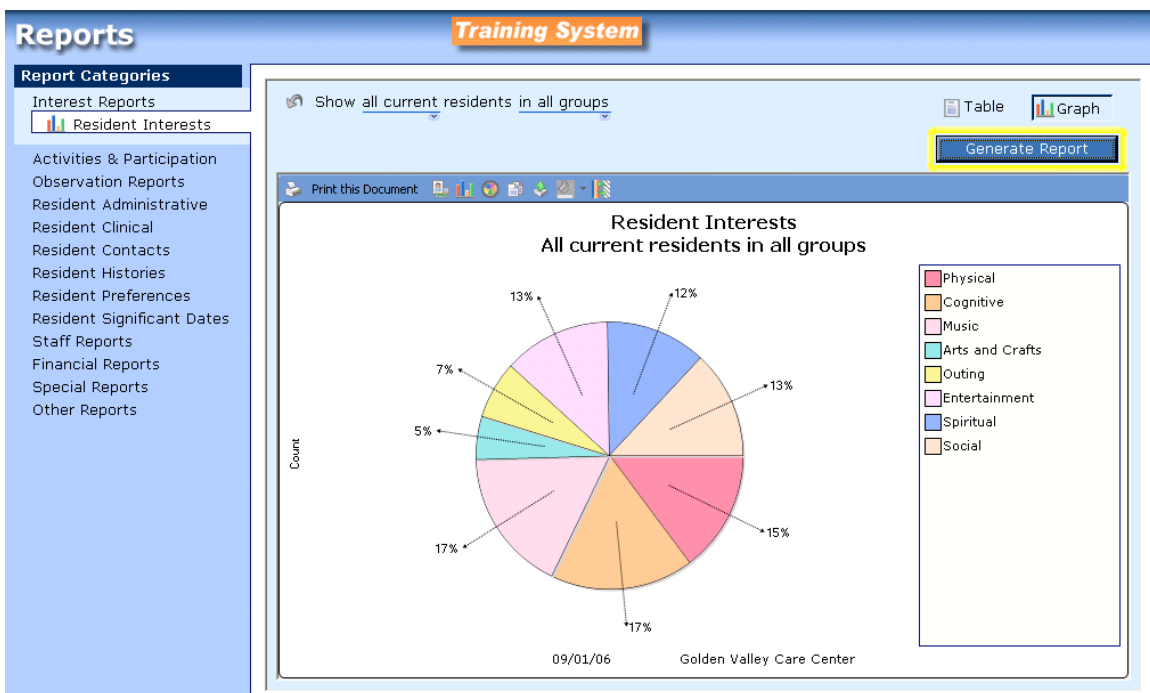
You can also get a graphic version that summarizes the interests of all of your residents.

Click the “Graph” command icon.



ProActivity Reports can also present this information as a pie graph.

Click the “Pie Graph” command icon.



Explore the other reports by clicking on each report category from the list on the left and then clicking on the report titles from the lists that appear on the right.

You've now seen an overview of what ProActivity Reports can do for you. The system has built-in online help that can provide you more detailed help on specific actions. It's available from the "Help" icon on the main toolbar at the top of the screen.



Help

You can also explore the system by holding the mouse over the command icons throughout the program. "ToolTip Help" will pop up to explain what each command does.

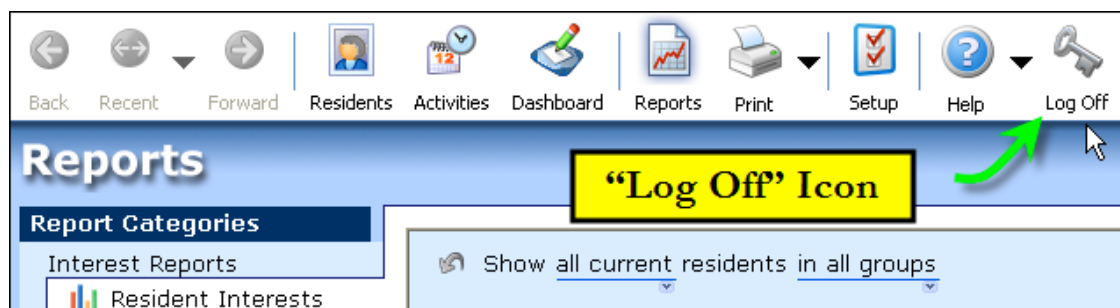
Getting Started

This section will show you how to get started working with ProActivity Reports with your own resident and activity information.

ProActivity Reports is a big system. It can help you manage almost all aspects of your Activity Department. You may find that it's easiest to get started by learning small pieces of the program at a time. For example, the system can track lots of different kinds of resident information for you, but you don't need to type it all in at the very beginning to get useful work out of ProActivity Reports. We recommend that you start by just entering your residents' names and assigning them to groups.

The first step in getting started with ProActivity Reports is telling it how you run your department. To do that, we need to log out of the Training System and then log in to work with your Real Resident Information.

Click the “Log Off” icon on the main toolbar at the top of the screen.



You're returned to the “Login” screen. Instead of working with the Training System, we'll work with your Real Resident Information.

Unlike the Training System, which is full of fake resident and activity information for you to practice with, the Real Resident Information system has no resident or activity information in it until you add your own. This is the part of the system that you'll use to run your real activity department.

You can always switch back to the Training System to experiment or to train your staff.

Login

Golden Valley Care Center

Work with: **Real Resident Information**

User Name:

Password:

Login

Message: You can display your own message here by setting the "Login Message" in the Facility Information section of the Setup screen.

Customer Key: KXV-AK-MJPC

License: You are currently running this software in a Free Trial evaluation period without a software license. Your Free Trial expires after 04/30/2006.

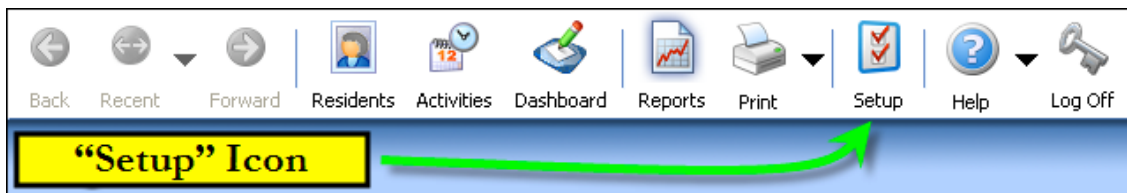
From the "Work with: menu, choose "Real Resident Information".

Enter your user name and password, and then click the "Login" button.

ProActivity Reports needs to know some of the specifics of how you run your department. For example, what are the names of your resident groups, how many different calendars do you want to work with, and what participation levels do you use to track resident participation.

You provide this information to the system using the "Setup" screen.

Click the "Setup" icon on the main toolbar at the top of the screen.



Facility Information

Click “Facility Information” in the top left of the Setup screen.

The screenshot shows the 'Setup' window with a sidebar on the left and a main content area. The sidebar has several categories: 'Facility' (with 'Facility Information' and 'HIPAA Settings' listed), 'Staff & Security' (with 'Staff' and 'Security Roles'), 'To Do's & Appointments' (with 'To Do Categories' and 'Appointment Categories'), 'Resident Information' (with 'Groups', 'Precautions', 'QuickEntries', 'Room Stimuli', 'Cognitive Levels', and 'Diets'), and 'Activities' (with 'Activity Locations', 'Interest Categories', 'Calendar Names', and 'Participation Levels'). The main content area is titled 'Facility Information' and contains several input fields: 'Name' (with 'Golden Valley Care Center' entered), 'Address' (with '123 North Main Street Cincinnati, OH 45202' entered), 'Customer Key' (with 'WXH-VV-T7UR' entered), and 'License Key' (empty). There is a 'Graphic' section with a placeholder image of a building and a 'Login Message' section with a placeholder text 'You can display your own message here by setting the'. At the bottom right, there are 'Save Changes' and 'Cancel Changes' buttons.

This screen is for entering information about your facility.

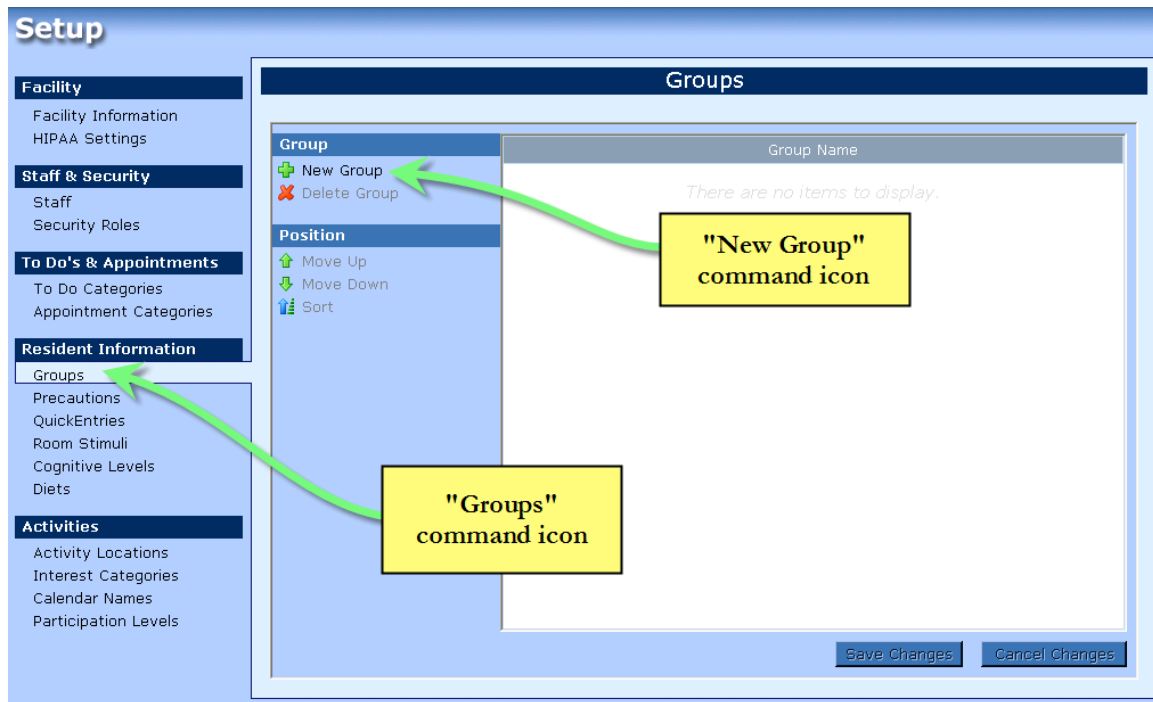
Enter your facility's name and address.

If you have a picture of your facility (or a logo or some other identifying art), you can make it appear on the Login screen by clicking in the “Graphic” box and loading it from a file or pasting it in.

Resident Groups

Most facilities organize their residents into “Care Groups” or “Resident Groups”. These groups may be based on resident acuity, length of stay, or what part of the building the residents are in. We next need to tell ProActivity Reports how you group residents in your facility.

Click on “Groups” on the bar on the left. (It’s under “Resident Information.”)



Initially, there are no Groups defined in ProActivity Reports. You'll add group names that are appropriate for your facility.

Click the “New Group” command icon and enter the name of one of your groups (e.g., “Rehab”, “Dementia”, “Long Term Care”, or “Maple”).

Do this for each of your groups.

Click the “Save Changes” button in the lower right.

Creating Interest Categories

Interest Categories are an important part of managing your activity program. You can tell ProActivity Reports which kinds of activities interest each resident, and you can tell it what interest category each activity that you schedule addresses.

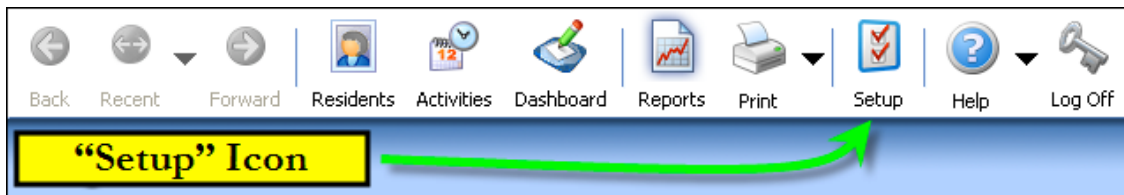
The software will help you make sure that the activities that you're scheduling reflect the interests of your current residents. It will also let you create reports that you can use to demonstrate to state surveyors that your activity program meets or exceeds their interpretive guidelines.

Matching the activities that you offer with the interests of your current residents is the key to creating a better activity program.

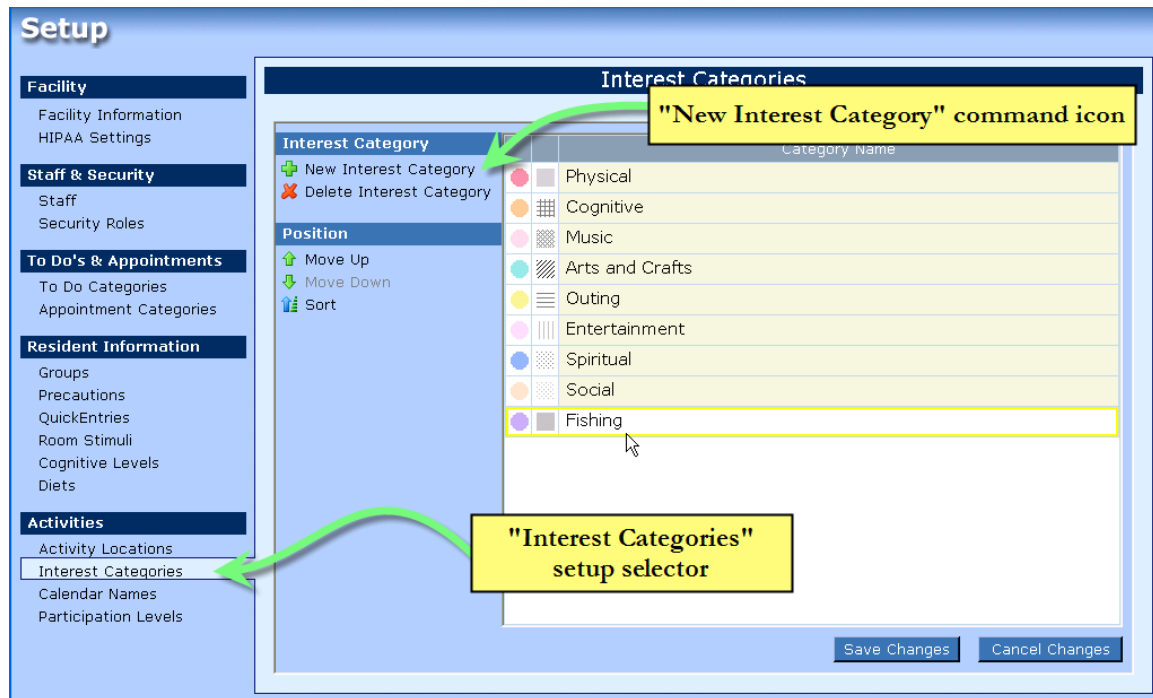
ProActivity Reports comes with a pre-defined set of Interest Categories, such as "Physical", "Cognitive", and "Music". You can also add your own categories. For example, if your residents are interested in fishing, you might add a "Fishing" category.

To create a new Interest Category, we need to go to the Setup screen.

Click the "Setup" icon on the main toolbar at the top of the screen.



On the Setup screen, click on “Interest Categories” on the bar on the left. (It’s under “Activities”.)



Click the “New Interest Category” command icon and enter the name of your new interest category (e.g., “Fishing”).

You can organize your interest categories by color, too. By clicking on the colored circle to the left of the interest category, you can customize how your interest categories appear throughout the program.

Click the “Save Changes” button in the lower right.

You’ve successfully created a new Interest Category. You can now tell the software which of your residents are interested in Fishing. For detailed help on assigning resident interests, please see the “Assigning Resident Interests” section of this Step-by-Step Guide.

You can also tell the software which activities address each interest category by using the “Activity Description Library” tab of the “Activities” screen.

Calendar Names

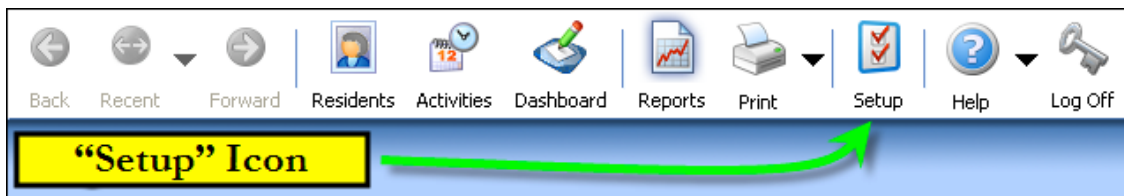
Most facilities have more than one activity calendar in use at the same time. For example, you may use a “High Functioning” calendar and a “Low Functioning” calendar, each with activities for residents of different acuities. Another approach is to use calendars named after the resident groups that they serve.

You can set up multiple activity calendars in ProActivity Reports to reflect the way you run your facility.

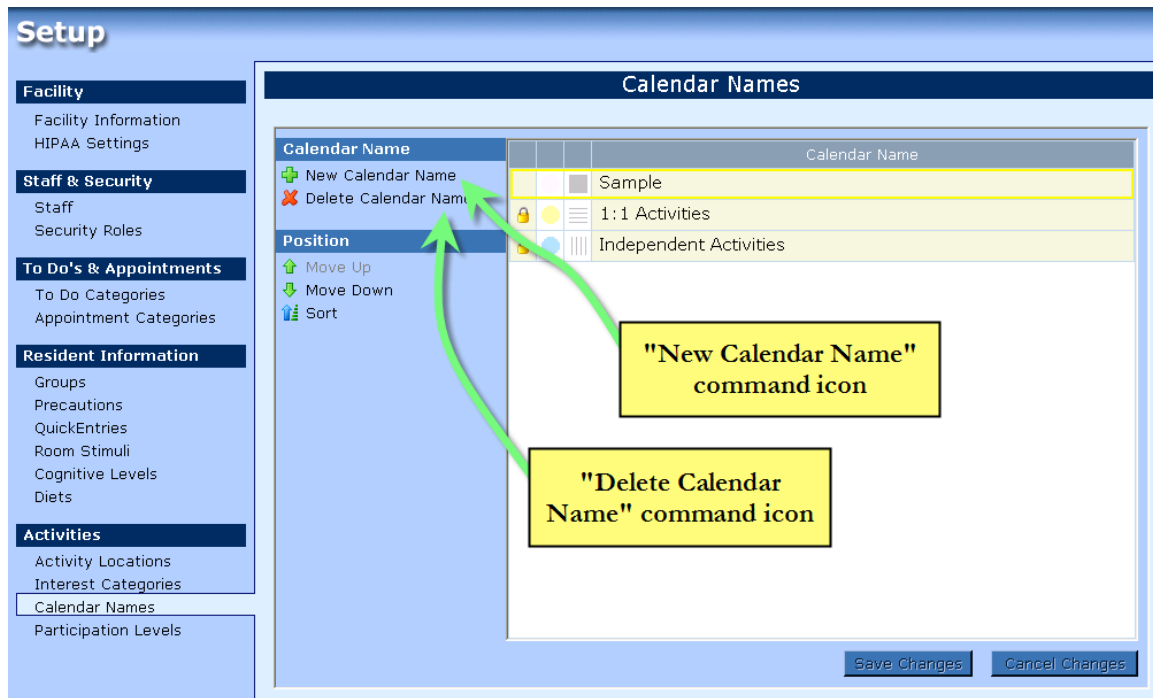
You create and name your Calendars using the “Calendar Names” area of the “Setup” section of the software.

To create and name a new Calendar,

Click the “Setup” icon on the main toolbar at the top of the screen.



Click on “Calendar Names” from the list on the left. (It’s under “Activities.”)



Click the “New Calendar Name” command icon in the top left of the “Calendar Names” panel.

Enter the name of one of your calendars (e.g. “High Functioning”, “Low Functioning”, “Dementia”, or “Maple”).

Click on the colored circle to the left of the calendar name to pick its color. (The color will be used to identify which calendar each activity is on.)

Do this for each of your groups.

Click the “Save Changes” button in the lower right.

You can now add activities to your new calendar in the “Activities/ Scheduling & Participation” section.

You can format it, and add text and graphics to it, in the “Activities/ Smart Calendar Creator” section.

ProActivity Reports has two built-in calendars that can't be deleted. They are the "1:1 Activities" calendar and the "Independent Activities" calendar. One-to-one and Independent activities are automatically placed on these calendars.

ProActivity Reports ships with a fake calendar called "Sample" already created. It's included just to make exploring the software easier. Once we've added calendars that are appropriate for your facility, we can delete the Sample calendar.

Click on the "Sample" calendar to select it.

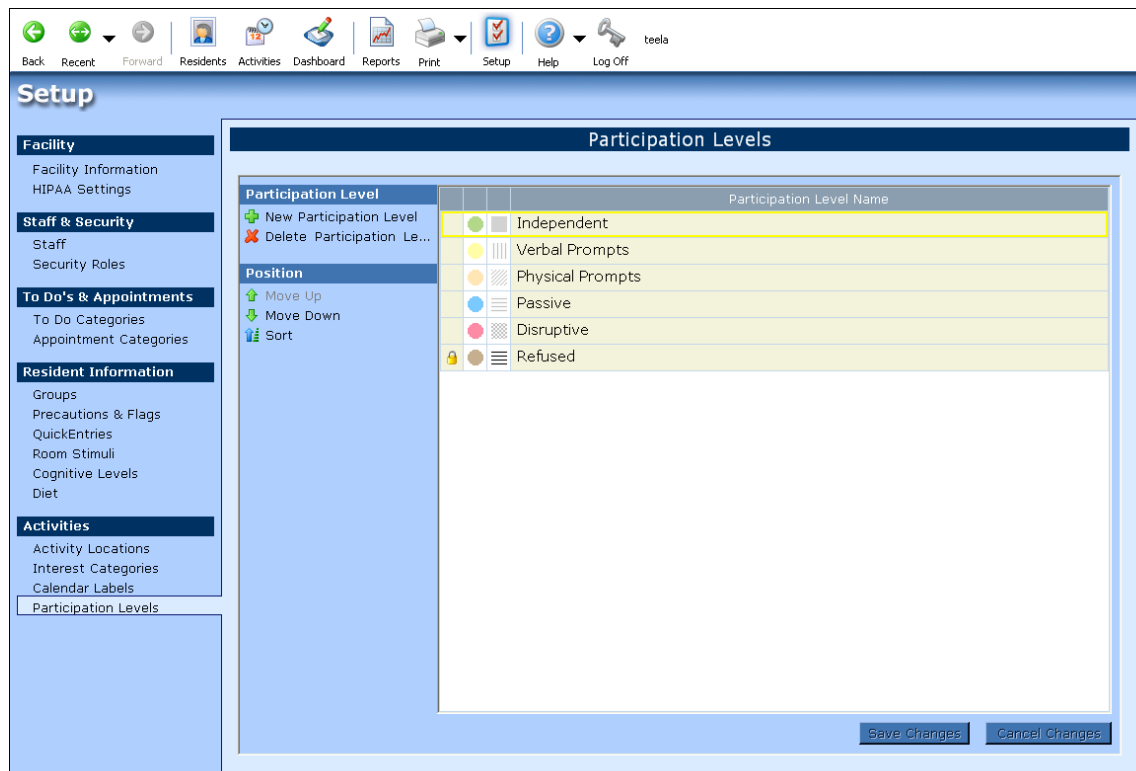
Click the "Delete Calendar Name" command icon.

Click the "Save Changes" button in the lower right.

Participation Levels

The last thing we need to do before getting started is to tell ProActivity Reports what “Participation Levels” you use in your facility. That is, how do you describe how actively a resident participated in an activity.

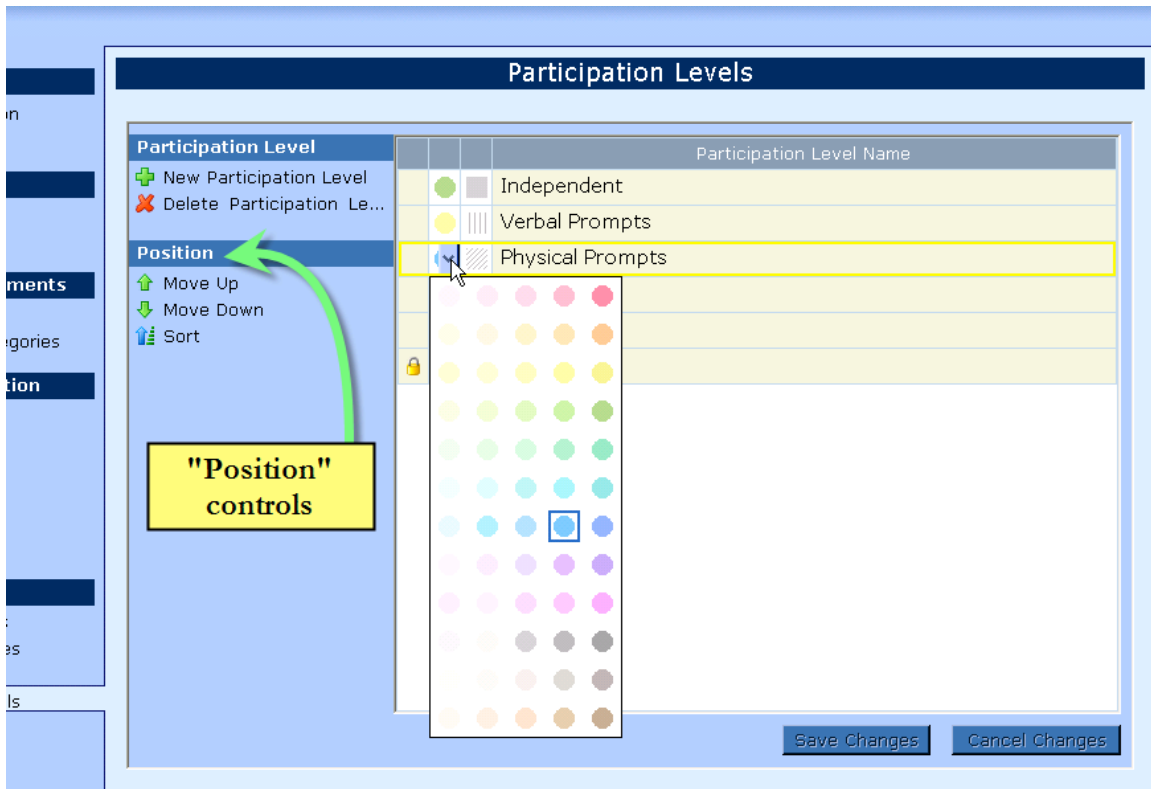
Click on “Participation Levels” on the bar on the left. (It’s under “Activities.”)



ProActivity Reports ships with a participation level structure that’s used by a lot of facilities. If a resident participated independently in an activity (without any prompting required), you’d mark his participation for that activity as “Independent”. If he required verbal prompts, you’d mark him “Verbal Prompts”, and so on.

If your facility uses a different system, you can delete the levels that don’t work for you using the “Delete Participation Level” command, and you can add more appropriate level descriptions using the “Add Participation Level” command.

Notice that, just like with Calendar Names, you can assign colors to each level by clicking in the colored circle to the left of each participation level's description. You can also change the order in which your participation levels appear in this list using the commands listed under "Position". This will affect how they appear when you're using them in other parts of the program.



Other Setup Items

The Setup screen lets you completely customize ProActivity Reports to work the way you do.

In addition to the changes we've made here, you can control things like Precautions and Flags, cognitive levels, dietary restrictions, etc. You also use this Setup area to add user names and passwords for your staff to be able to use ProActivity Reports. (It's a multi-user system – you can share resident and activity information over your network.)

You can explore the other areas of the Setup screen by clicking on the items listed on the left side of the screen. Most of them are self-explanatory, but there's always help available using the ToolTip Help or from the Help menu on the main toolbar at the top of the screen.

Getting Started

For now, though, you've done enough setting up that you should be able to get use out of the software. Again, it's a big system, and you don't have to jump right in and start using all of it at once.

We recommend that you start now by adding your residents (by clicking the “Residents” icon on the main toolbar at the top of the screen, and then clicking the “Add” or “Import” buttons above the Resident List). The next section of the manual will give you detailed instructions for adding or importing your resident names. You don't need to enter all of the information about residents. You can get started by entering just their names. You will also find it immediately useful if you tell ProActivity Reports which Resident Group each resident belongs to (you'll enter it in the “Administrative” section of the Face Sheet).

You might want to next explore planning your activities using the “Scheduling and Participation” tab of the “Activities” screen. You can then use the “Smart Calendar Creator” tab of the “Activities” screen to automatically create the calendars that you post in your facility.

If we can help you get started, please don't hesitate to call Sean Rome at Mature Solutions at (513) 871-0030 or email him at srome@MatureSolutions.com.

Step-by-Step Guides

This section will show you step-by-step how to use ProActivity Reports. It's organized around specific actions that you're likely to want to do, such as setting up your system, adding residents, or creating activities. If you need help figuring out how to do something, just scan the table of contents at the beginning of this document and jump straight to the step-by-step guide for that action.

Remember, there's also an extensive on-line help system built into ProActivity Reports. It's available from the "Help" icon on the main toolbar at the top of the screen.



You can also explore the system by holding the mouse over the command icons throughout the program. "ToolTip Help" will pop up to explain what each command does.

Importing Residents

There are two ways to add new resident names to your ProActivity Reports system: you can add them one at a time manually, or you can import a list of them automatically. Importing them is much faster and easier.

Adding them one at a time is covered in the next section.

To import a list of resident names, we first need to get your list into a "text" file. A text file is in a special format that all word processors can write, but it's different from their normal, default format. It's a very simple file format, with all of the fonts and styling information removed. You have to explicitly save your file in "text" format.

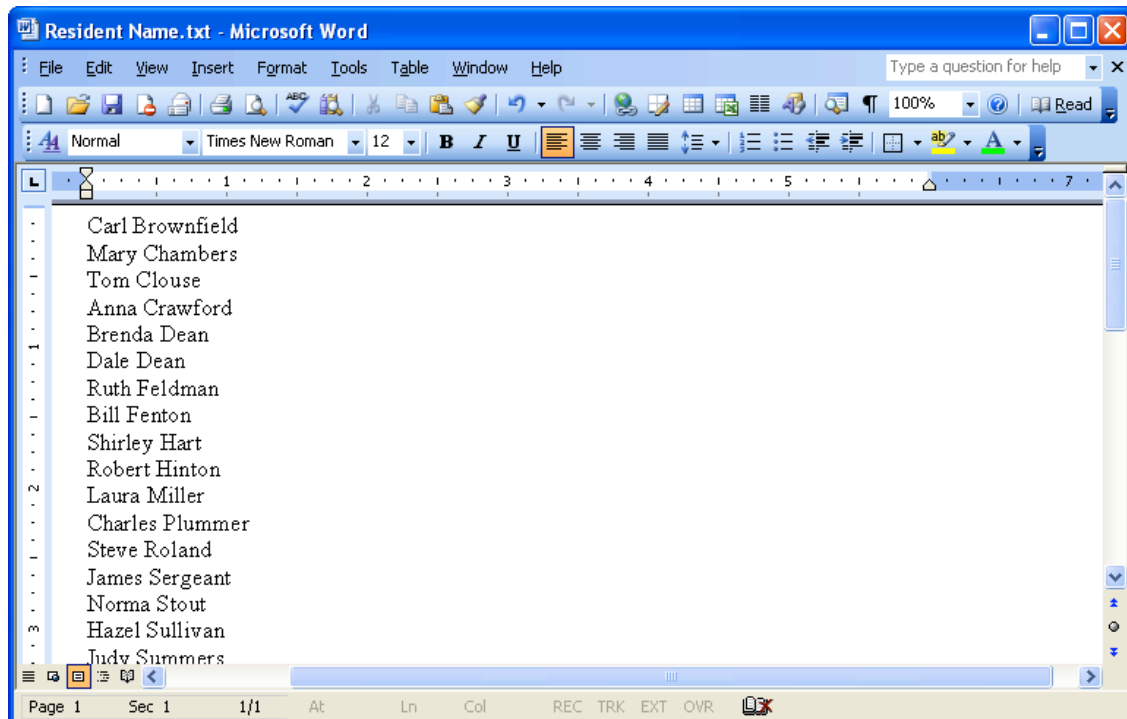
The instructions below will show you how to create your resident list in Microsoft Word. If your list is in another application, the steps should be very similar. If you have any trouble, please contact Mature Solutions Technical Support Group at (513) 871-0030 or email your questions to srome@MatureSolutions.com.

Creating a Text-Format Resident List from Microsoft Word

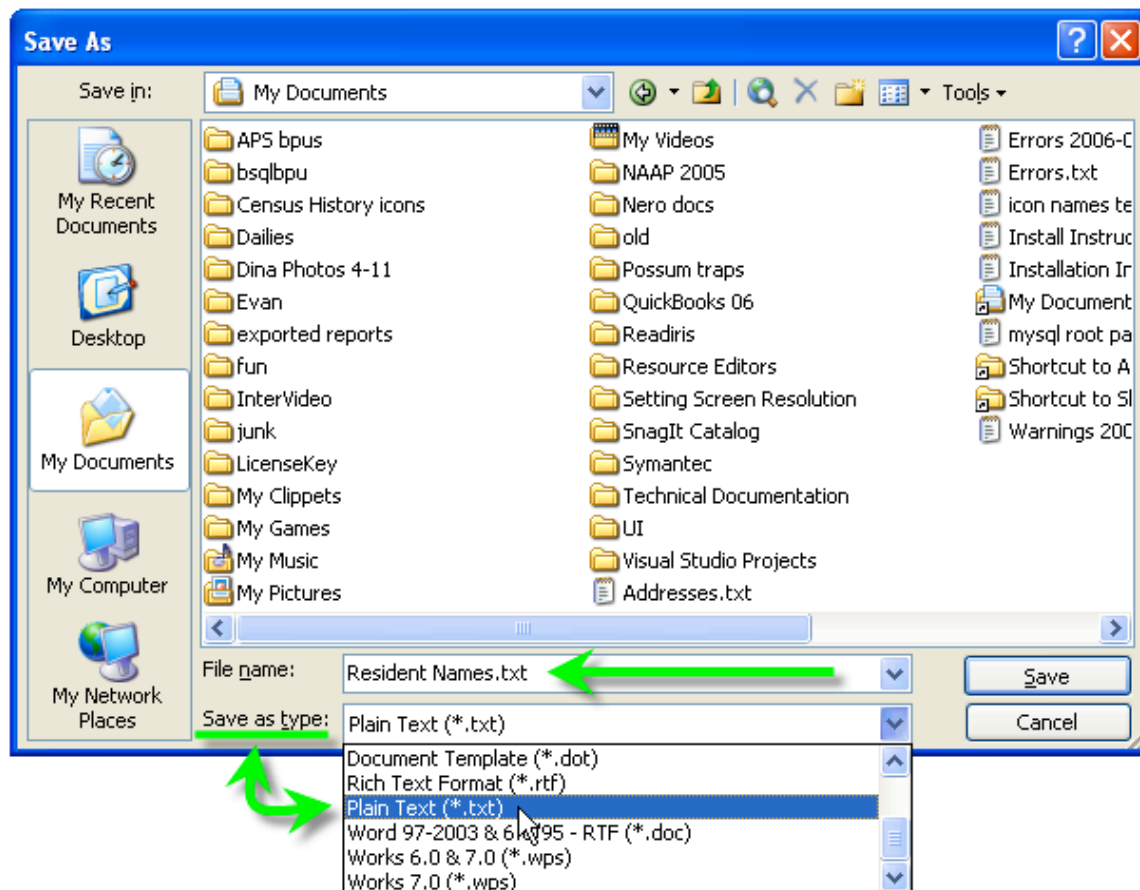
In Microsoft Word, create your list by putting your resident names one per line, like in the picture below.

They can be in either “FirstName LastName” order or in “LastName, FirstName” order (but they all have to be in the same order).

You probably already have a list of resident names that you’ve used for some other purpose. If so, make a copy of it and delete all of the information from it except for the residents’ names.



From the “File” menu at the top left of the Word menu bar, choose “Save As...”.



From the “Save as type:” menu at the bottom of the dialog, choose “Plain Text (*.txt)”. You may have to scroll through the list of available file types to find it.

For the “File name:”, enter “Resident Names.txt”.

Usually, you’ll want to save your files in your “My Documents” folder. You can choose this folder from the “Save in:” menu at the top of the dialog window.

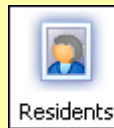
Click “Save”.

After saving your file, quit Microsoft Word.

Importing Residents Once You Have Your Resident List Text File Ready

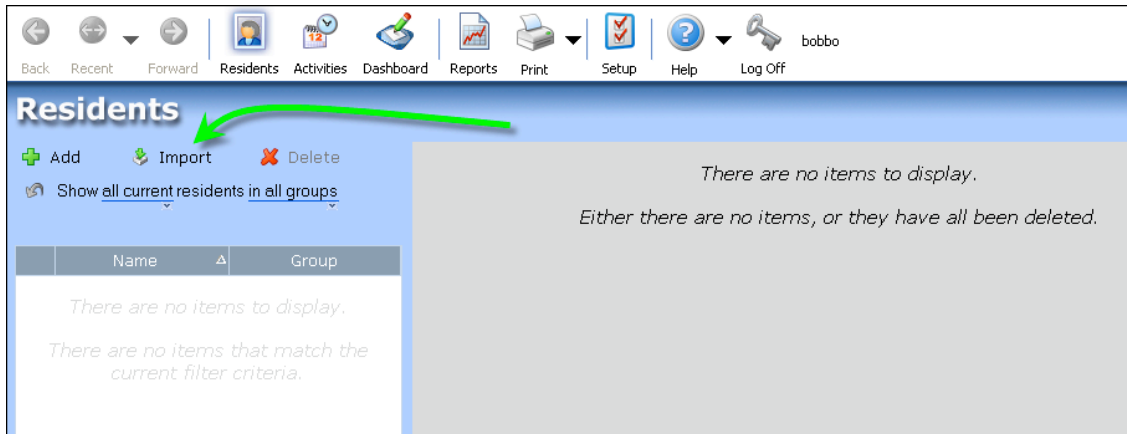
Open ProActivity Reports.

If your screen doesn't say "Residents" in large white letters at the top left of the window, click the "Residents" icon on the main toolbar at the top of the screen.



This will take you to the Residents Screen.

If you haven't added any residents yet, your screen will look like this:



Click the "Import" command icon in the top left of the Residents screen.

Clicking the “Import” command icon opens the dialog shown below.

First, ProActivity Reports needs to know how your list of resident names is arranged. Are the first names of your residents before the last names (like “John Smith”), or are they listed last name first (like “Smith, John”)?

If the resident list that you created is like the one in this example, which lists the residents’ first names before their last names, click the “FirstName LastName” control.

Import Residents

ProActivity Reports can import residents from a text file containing a list of resident names.

The first and last names in your list can be separated by spaces, commas, or tabs. Please indicate whether your resident names are listed as “FirstName LastName” or “LastName, FirstName”.

After selecting the name order, click the “Open Import File” button to choose the file containing your new resident names.

Resident Name Order in the Import File

☐ LastName, FirstName (“Smith, John”)

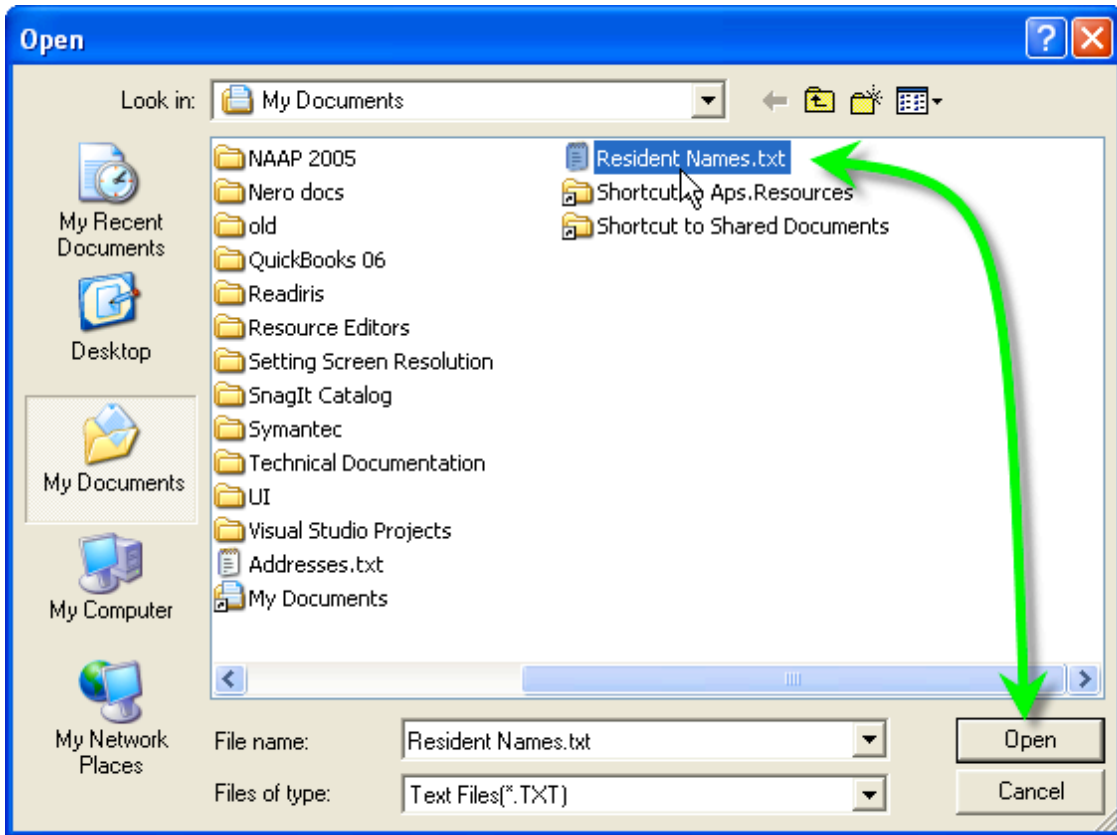
☒ FirstName LastName (“John Smith”)

Click [here](#) to learn more about Importing Residents.

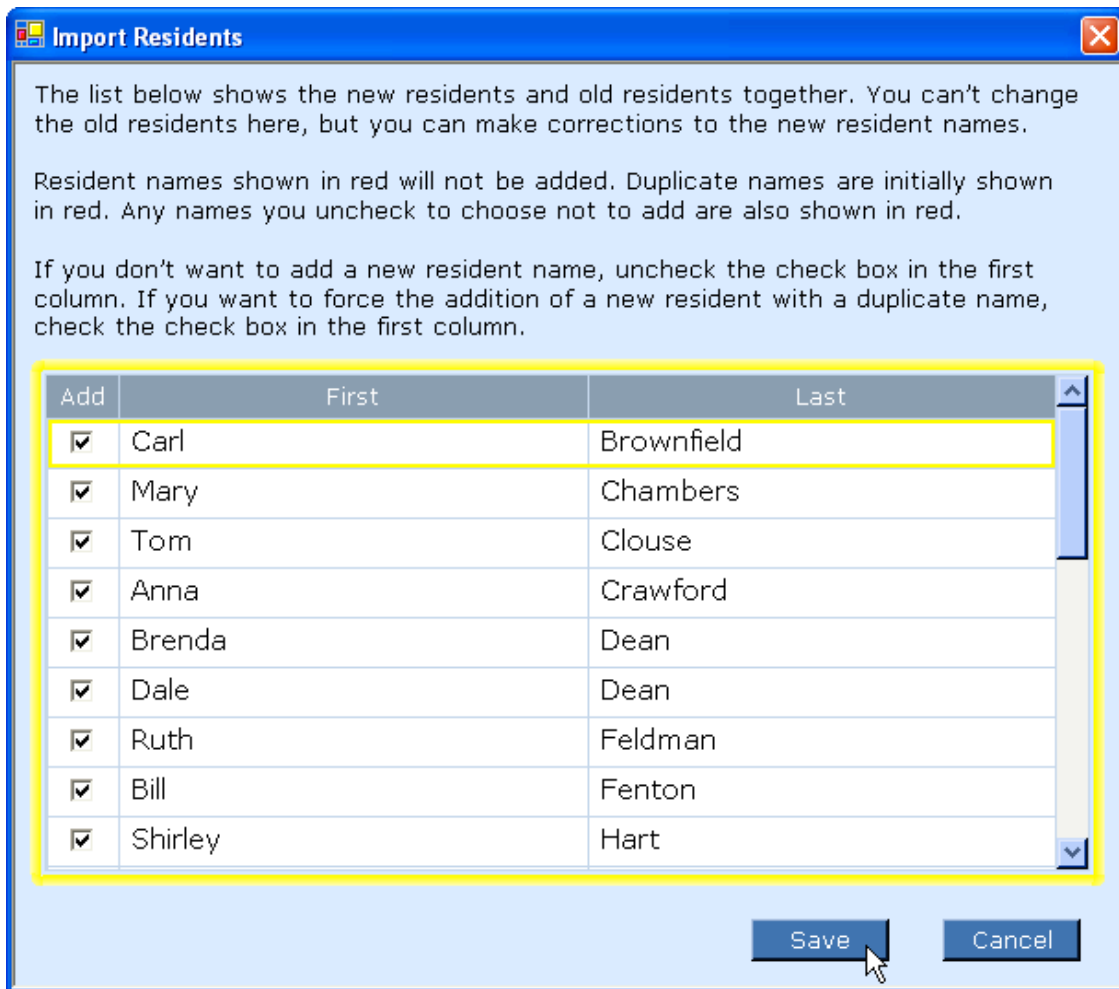
Open Import File Cancel

Next, we need to tell ProActivity Reports where to find the file containing your resident list.

Click the “Open Import File” button.



Select your “Resident Names.txt” file and then click “Open”.



ProActivity Reports reads in your resident list and tries to figure out which part of each line is the first name and which is the last name.

It will sometimes get confused with names that are more than two words. For example, with names like “Lee Van Cleef” or “Bobby Joe Hinton”, it doesn’t know whether to put the “Van” or the “Joe” with the first name or the last name. You can click on a name in the list to edit it.

The leftmost column is a checkbox that you can use to tell the software whether or not to import each resident name that it found. If you leave the box checked, it will add that resident. If you uncheck the box, it won’t add that resident. It will show residents that it’s not going to add in red.

If you already had entered some residents before importing your new resident list, ProActivity Reports will show your old residents mixed in with the ones that you’re about to import. They’re all sorted together by last name.

If ProActivity Reports finds duplicates in your imported resident list – that is, it thinks that you’re trying to import a resident that you’ve already added previously – it will flag the duplicate name and not add it. You can force it to add the resident a second time by clicking its checkbox (although you probably don’t want to do that).

Scroll through the list of resident names and make any corrections. Uncheck the box in the “Add” column if there’s a resident name that you don’t want to add. Click the “Save” button to import your resident names.

Back
 Recent
 Forward

Residents
 Activities
 Dashboard
 Reports

Residents

Add
 Import
 Delete

Show all current residents in all groups

	Name	Group
	Carl Brownfield	no group assig.
	Mary Chambers	no group assig.
	Tom Clouse	no group assig.
	Anna Crawford	no group assig.
	Brenda Dean	no group assig.
	Dale Dean	no group assig.
	Ruth Feldman	no group assig.
	Bill Fenton	no group assig.
	Shirley Hart	no group assig.
	Robert Hinton	no group assig.
	Laura Miller	no group assig.
	Charles Plumm...	no group assig.
	Steve Roland	no group assig.
	James Sergeant	no group assig.
	Norma Stout	no group assig.
	Hazel Sullivan	no group assig.
	Judy Summers	no group assig.

ProActivity Reports imports your resident names and adds them to the Resident List. If you click on a resident name in the list, you can then enter more information about him in the Resident Detail Area on the right side of the Residents screen.

ProActivity Reports lets you keep track of lots of different kinds of information about each resident, but you don't have to enter it all right now to start getting valuable use from the software. The more information you put into the system, the more you'll get out of it – but ProActivity Reports only needs a little information to start being helpful.

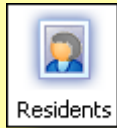
For most people, the most immediately useful information that you can add about each resident is what Group he belongs to and what his Interests are. Please see the “Creating Resident Groups”, “Assigning Residents to Groups” and “Assigning Resident Interests” sections of this Step-by-Step Guide for detailed help.

Adding Residents One at a Time

If you have several residents to add, it's faster and easier to import their names from a text files than to add them one at a time. For detailed help on this approach, please see the "Importing Residents" section of this Step-by-Step Guide.




To add a single Resident, start by going to the Residents screen.


If your screen doesn't say "Residents" in large white letters at the top left of the window, click the "Residents" icon on the main toolbar at the top of the screen.


















This will take you to the Residents Screen.

Residents

 New  Import  Delete

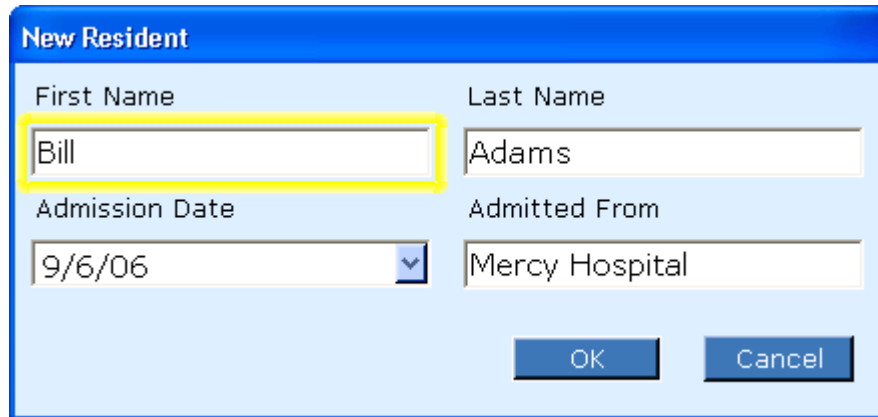
 Show all current residents in all groups

	Name ▲	Group ▲
	Carl Brownfield	Willow (Dem...
	Mary Chambers	Willow (Dem...
	Tom Couse	Evergreen (...)
	Anna Crawford	Maple (Long...
	Brenda Dean	Evergreen (...)
	Dale Dean	Maple (Long...
	Ruth Feldman	Maple (Long...
	Bill Fenton	Maple (Long...
	Janet Harrison	Maple (Long...
	Shirley Hart	Maple (Long...
	Robert Hinton	Willow (Dem...
	Laura Miller	Maple (Long...
	Hazel O'Sullivan	Willow (Dem...
	Charles Plumm...	Maple (Long...
	Steve Santini	Evergreen (...)

☒ "FirstName LastName" order
☐ "LastName, FirstName" order

Click the “New” command icon in the top left of the Residents screen.

Clicking the “New” command icon opens the dialog shown below.

A screenshot of a software dialog box titled "New Resident". The dialog has a blue header bar with the title. Below the header, there are four input fields arranged in a 2x2 grid. The top-left field is labeled "First Name" and contains the text "Bill"; this field is highlighted with a yellow rectangular border. The top-right field is labeled "Last Name" and contains the text "Adams". The bottom-left field is labeled "Admission Date" and contains the date "9/6/06" with a small downward arrow on the right side. The bottom-right field is labeled "Admitted From" and contains the text "Mercy Hospital". At the bottom right of the dialog, there are two buttons: "OK" and "Cancel".

First Name	Last Name
Bill	Adams
Admission Date	Admitted From
9/6/06	Mercy Hospital

OK Cancel

Enter the new resident’s first and last name.

Enter the date the resident was admitted and where he was admitted from (for example, “Home”, a hospital, another facility, etc.).

If you don’t have the admission information handy, you can come back later and enter it on this resident’s “Census” tab. For detailed help on using the Census History, please see the “Census History” section of this Step-by-Step Guide.

Click the “OK” button.

Your new resident, Bill Adams, has been created. Notice that he appears selected in the Resident List on the left, and that the Resident Detail area on the right shows his information.

The screenshot shows a software interface for managing residents. On the left, a table lists residents, with 'Bill Adams' highlighted. On the right, a detailed form for 'Bill Adams' is displayed, showing fields for personal and facility information. A green arrow points from the 'no group assigned' dropdown in the 'Facility Information' section to the 'Group' field in the 'Resident' section.

Name	Group
Bill Adams	no group assigned
Carl Brownfield	Willow (De...)
Mary Chambers	Willow (De...)
Tom Clouse	Evergreen...
Anna Crawford	Maple (Lon...)
Brenda Dean	Evergreen...
Dale Dean	Maple (Lon...)
Ruth Feldman	Maple (Lon...)
Bill Fenton	Maple (Lon...)
Janet Harrison	Maple (Lon...)
Shirley Hart	Maple (Lon...)
Robert Hinton	Willow (De...)
Laura Miller	Maple (Lon...)
Hazel O'Sullivan	Willow (De...)
Charles Plummer	Maple (Lon...)

Resident Detail: Bill Adams

Administrative Section:

Resident Information:

- First: Bill
- Middle:
- Last: Adams
- Title:
- Suffix:
- Preferred Name:
- Birthdate:
- Age: 0 (Not sure of ☐ Day ☐ Month ☐ Year)

Facility Information:

- Admission Date: 9/6/06
- Group: no group assigned
- Room:

Buttons: Save Changes, Cancel Changes

If you've already set up your Resident Groups, you can assign this new resident to a Group by selecting it from the Group menu on the Face Sheet/ Administration tab. For detailed help on setting up Groups, please see the "Creating Resident Groups" section of this Step-by-Step Guide.

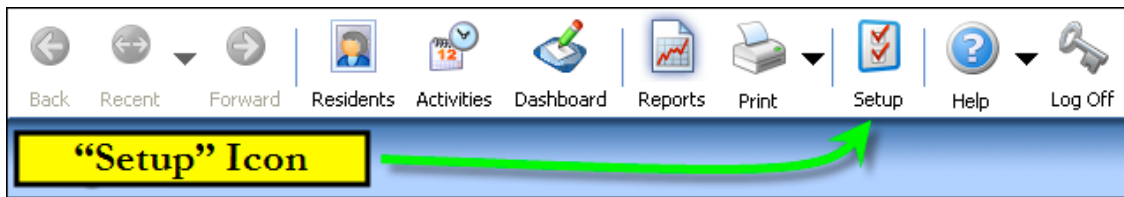
If you'd like to provide a picture for this resident, please see the "Resident Pictures" section of this Step-by-Step Guide.

Creating Resident Groups

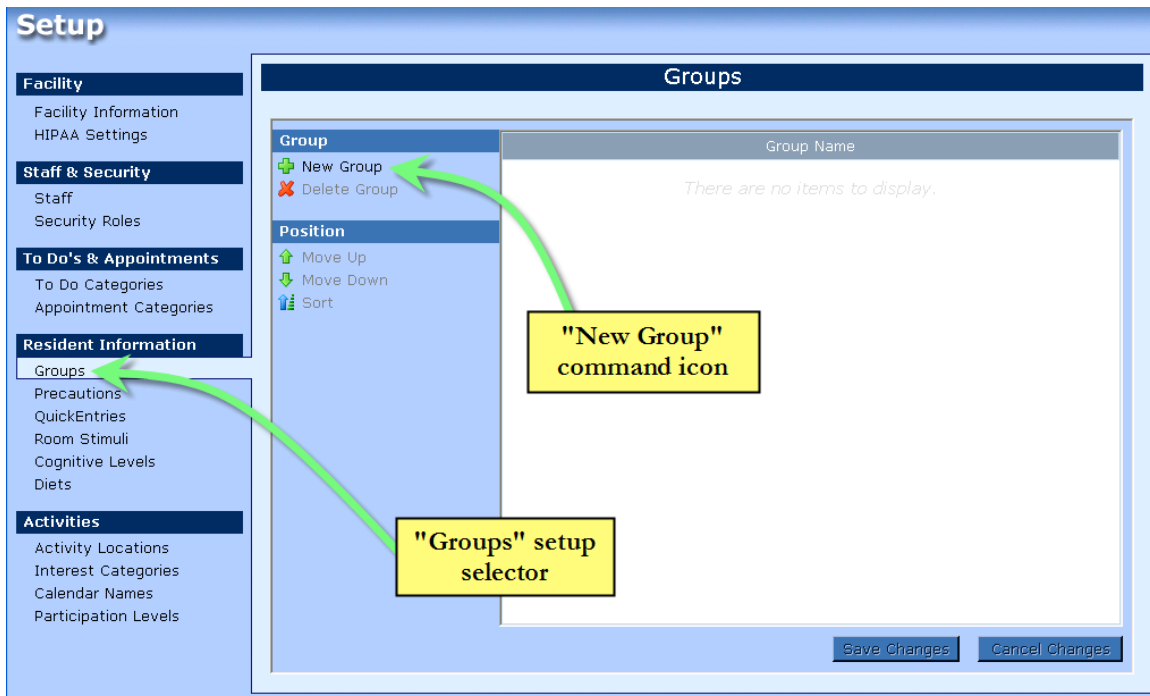
Most facilities organize their residents into “Care Groups” or “Resident Groups”. These Groups may be based on resident acuity, length of stay, or what part of the facility the residents are in.

To tell ProActivity Reports how you group residents in your facility, we need to go to the Setup screen.

Click the “Setup” icon on the main toolbar at the top of the screen.



On the Setup screen, select “Groups” from the command bar on the left. (It’s under “Resident Information.”)



Click the “New Group” command icon and enter the name of one of your groups (e.g., “Rehab”, “Dementia”, “Long Term Care”, or “Maple”).

Do this for each of your groups.

Click the “Save Changes” button in the lower right.

The screenshot shows a software interface with a left-hand navigation menu and a main content area. The navigation menu is titled 'Setup' and includes sections for Facility, Staff & Security, To Do's & Appointments, Resident Information, and Activities. The 'Groups' option under Resident Information is selected. The main content area is titled 'Groups' and contains a table with two columns: 'Group' and 'Group Name'. The 'Group' column has icons for 'New Group' (green plus), 'Delete Group' (red X), 'Move Up' (green up arrow), 'Move Down' (green down arrow), and 'Sort' (blue list icon). The 'Group Name' column lists three groups: 'Evergreen (Rehabilitation Unit)', 'Maple (Long Term Care)', and 'Willow (Dementia)'. The 'Evergreen' group is highlighted with a yellow border. At the bottom right of the 'Groups' window are two buttons: 'Save Changes' and 'Cancel Changes'.

Group	Group Name
New Group	Evergreen (Rehabilitation Unit)
Delete Group	Maple (Long Term Care)
Move Up	Willow (Dementia)
Move Down	
Sort	

You can now assign residents to these groups to reflect the way you run your facility. Organizing residents into groups will help you quickly find residents by letting you filter resident lists when you're entering information or running reports.

For detailed help on assigning residents to Groups, please see the “Assigning Residents to Groups” section of this Step-by-Step Guide.

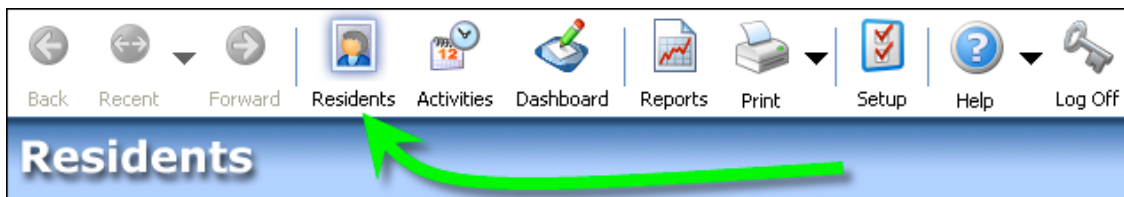
Assigning Residents to Groups

Most facilities organize their residents into “Care Groups” or “Resident Groups”. These Groups may be based on resident acuity, length of stay, or what part of the facility the residents are in. This section shows you how to assign each of your residents to a Group.

If you haven’t set up your Groups in the software yet, please see the “Creating Resident Groups” section of this Step-by-Step Guide.

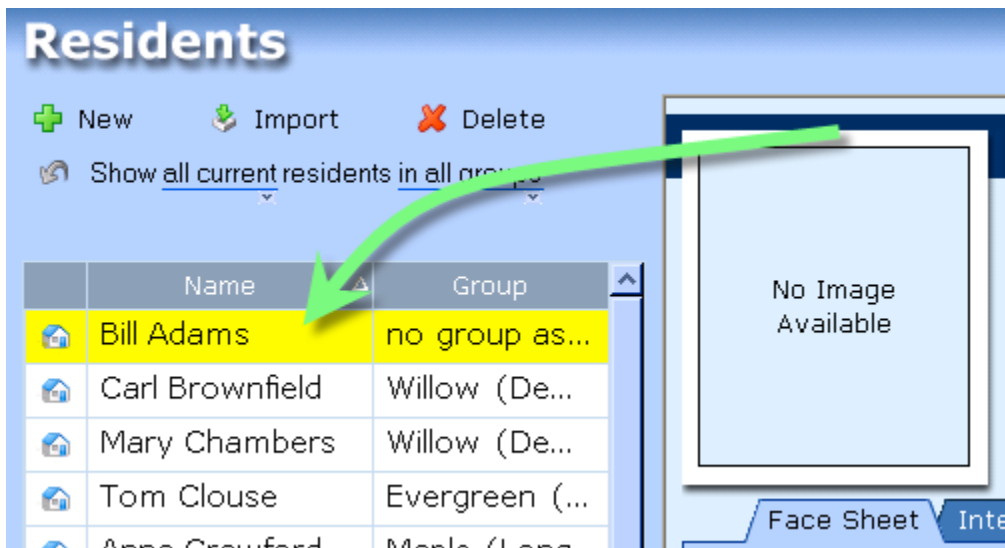
To assign a resident to a Group, we need to go to the Residents screen.

Click the “Residents” icon on the main toolbar at the top of the screen.



On the Residents screen, we need to go to the Administrative section of the Face Sheet tab for the resident we want to assign to a Group. For this example, we’ll assign Bill Adams to a Group.

From the Resident List on the left of the Residents screen, click on Bill Adams.



On the Residents screen, click on the “Face Sheet” tab.

This tab shows the resident’s Face Sheet information. It’s divided into sections. You choose which section to display using the “Show” menu at the top left of the Face Sheet tab. Each resident’s Group information is shown in the Administrative section.

The screenshot shows the 'Residents' application interface. On the left is a table of residents. The main area displays the 'Face Sheet' for 'Bill Adams'. A 'Show' menu is open, listing various sections. Annotations with green arrows and yellow boxes provide instructions: one points to the 'Face Sheet' tab in the top navigation bar, and another points to the 'Administrative' option in the 'Show' menu.

Name	Group
Bill Adams	no group as...
Carl Brownfield	Willow (De...
Mary Chambers	Willow (De...
Tom...	...
Ang...	Lon...
Br...	...
Date Dean	Maple (Lon...
Ruth Feldman	Maple (Lon...
Bill Fenton	Maple (Lon...
Janet Harrison	Maple (Lon...
Shirley Hart	Maple (Lon...
Robert Hinton	Willow (De...
Laura Miller	Maple (Lon...
Hazel O'Sullivan	Willow (De...
Charles Plummer	Maple (Lon...

Face Sheet | Interests | Participation | Observations | Progress | Census | To Do's

Show: Summary, **Administrative**, Personal, Lifestyle, History, Care, Diet, Precautions, Releases, Contacts, Comments, Life Story

Precautions: Releases: Contacts:

From the “Show” menu, choose the “Administrative” section.

Residents

[New](#)
[Import](#)
[Delete](#)

[Show all current residents in all groups](#)

Name	Group
Bill Adams	Maple (Lon...
Carl Brownfield	Willow (De...
Mary Chambers	Willow (De...
Tom Clouse	Evergreen...
Anna Crawford	Maple (Lon...
Brenda Dean	Evergreen...
Dale Dean	Maple (Lon...
Ruth Feldman	Maple (Lon...
Bill Fenton	Maple (Lon...
Janet Harrison	Maple (Lon...
Shirley Hart	Maple (Lon...
Robert Hinton	Willow (De...
Laura Miller	Maple (Lon...
Hazel O'Sullivan	Willow (De...
Charles Plummer	Maple (Lon...

☐ "FirstName LastName" order
☐ "LastName, FirstName" order

Bill Adams

Maple (Long Term Care)

No Image Available

Mobility: [+](#)
 Interests: [+](#)
 Special Instructions: [+](#)

[Face Sheet](#)
[Interests](#)
[Participation](#)
[Observations](#)
[Progress](#)
[Census](#)
[To Do's](#)

Show Administrative section

Resident

First:
 Middle:
 Last:

Title:
 Suffix:
 Preferred Name:

Birthdate:
 Age: (Not sure of ☐ Day ☐ Month ☐ Year)

Facility Information

Admission Date: [9/6/06](#)

Group:

no group assigned
 Evergreen (Rehabilitation Unit)
Maple (Long Term Care)
 Willow (Dementia)

[Save Changes](#)
[Cancel Changes](#)

From the "Group" menu, choose a Group for this resident.

Notice that his Group is automatically updated in the Resident List.

Click "Save Changes".

You have successfully assigned a Group to this resident.

Resident Pictures

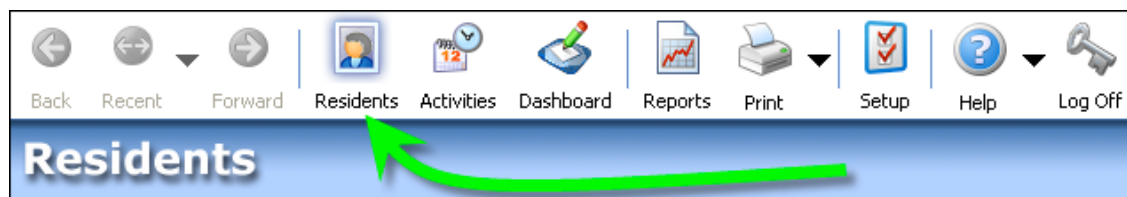
You can give each resident a picture. These pictures will help you and your staff recognize each resident, and they'll help you make sure that you're entering information about the right resident. The pictures also show up in many of the system's reports.

The first step, of course, is to get pictures of your residents into your computer. Most people just use a simple digital camera. The software that comes with your camera will make it easy to load your pictures on to your computer.

Your residents' families may also be able to provide you with pictures that you can scan in to your computer. Please see your scanner's instructions for details.

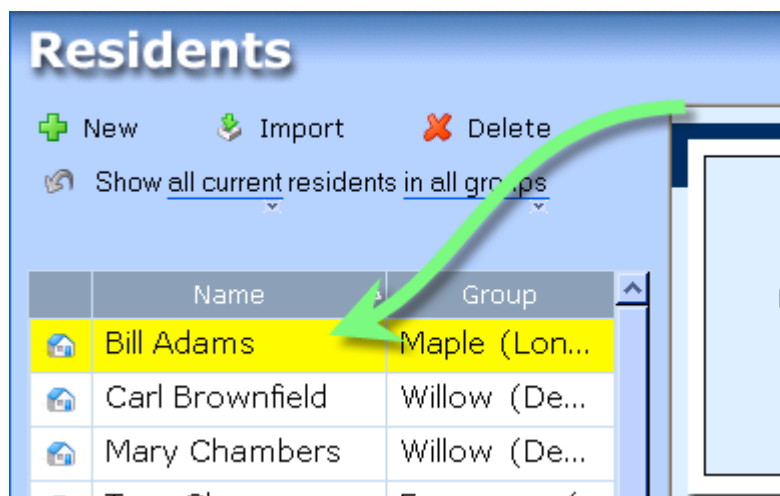
To associate a picture with a resident, we need to go to the Residents screen.

Click the "Residents" icon on the main toolbar at the top of the screen.



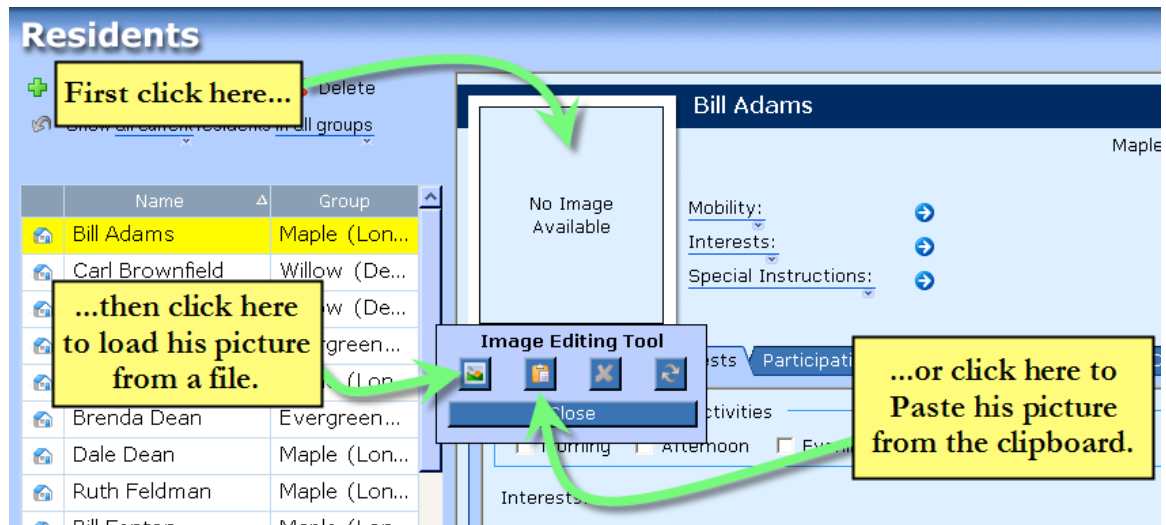
Next, select the resident that you want to give a picture to. For this example, we'll use Bill Adams.

From the Resident List on the left of the Residents screen, click on Bill Adams.




Once you've selected the resident in the Resident List, click on his picture box (where it says "No Image Available").

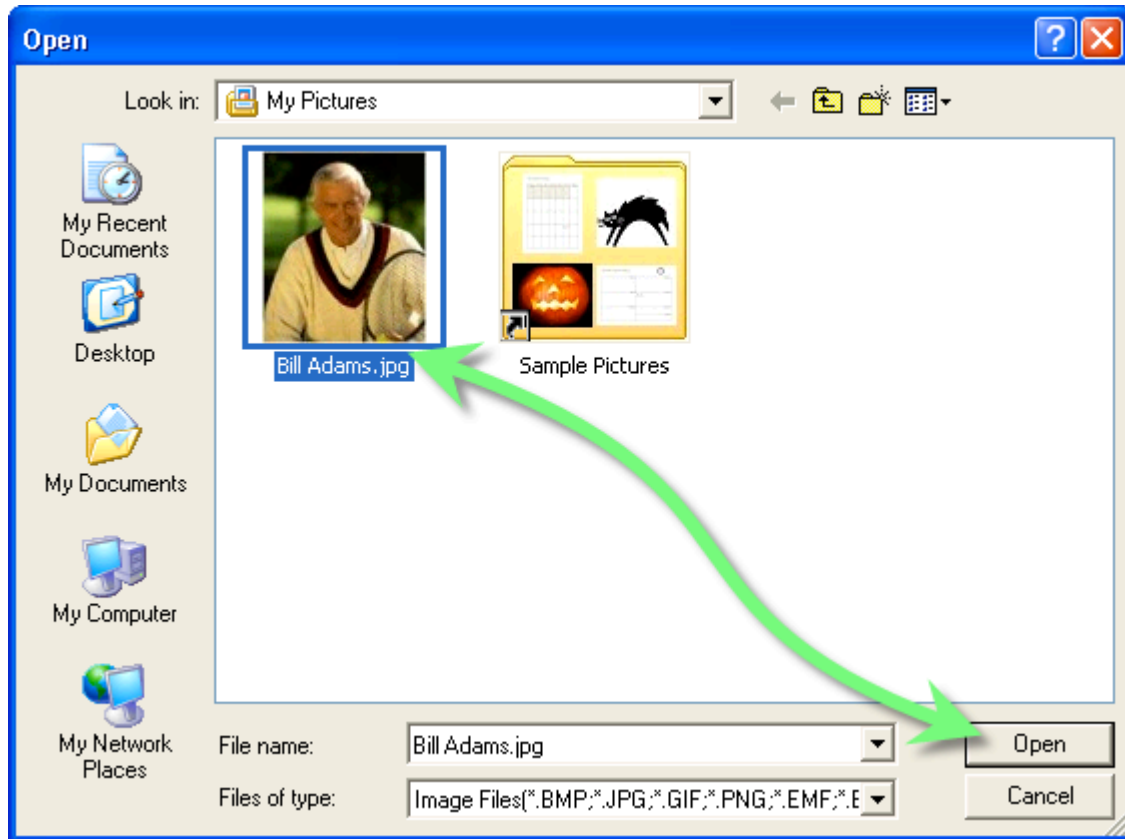
The "Image Editing Tool" will pop up.



There are two ways to assign a picture to a resident: you can load it from a file, or you can Paste it from the clipboard. (The "clipboard" is the temporary holding place where things go when you use the Copy and Paste commands.)

To load the picture from a file, click the  button.

A window will open asking you where to find the file that contains the resident's picture. Most people keep their pictures in their "My Pictures" folder, which is inside their "My Documents" folder.



Click on the resident's picture and then click "Open".

The resident's picture is loaded from the file.




Click the “Close” button to close the Image Editing Tool.


You’ve successfully given this resident a picture.

Instead of loading a picture from a file, you can also Paste it from the clipboard. Your method will depend on what other software you’re using to create or store resident pictures. The key is selecting the resident picture in that other software and copying it to the clipboard.

To use the Paste command to give the resident a picture, select the picture in the application that you’re using to create or store resident pictures, and Copy it. Then, return to ProActivity Reports, click on the resident’s picture box, and click the “Paste” button.

There are two other buttons in the Image Editing Tool:

The  button deletes the current resident picture.

The  button rotates the current resident picture.

Census History

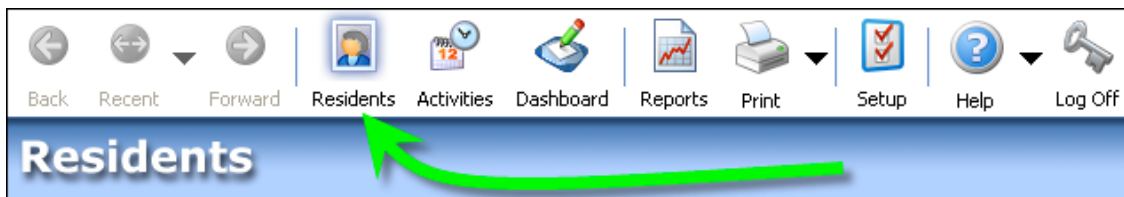
When you add residents one at a time to the system, a Census History admission record is automatically created as you add each resident. When you import a group of residents, no Census History records are automatically created, so you may want to add an admission record for each resident you imported.

You can also use the Census tab to keep track of a resident's status as he's temporarily transferred out (say, to a hospital) or re-admitted.

ProActivity Reports helps you keep track of each resident's census status so that you can filter residents in lists and reports. For example, you may want to run a report that only includes your current, in-house residents.

To edit the Census History status of a resident, we need to go to the Residents screen.

Click the “Residents” icon on the main toolbar at the top of the screen.



On the Residents screen, we select a resident and then go to the Census tab. For this example, we'll create an admission record for Bill Adams.

From the Resident List on the left of the Residents screen, click on "Bill Adams"...

Residents

New Import Delete
Show all current residents in all groups

Name	Group
Bill Adams	no group a...
Carl Brownfield	Willow (De...
Mary Chambers	Willow (De...
Tom Clouse	Evergreen...
Anna Crawford	Maple (Lon...
Brenda Dean	Evergreen...
Dale Dean	Maple (Lon...
Ruth	
Bill Fe	
Janet	
Shirle	
Robert Hinton	Willow (De...
Laura Miller	Maple (Lon...
Hazel O'Sullivan	Willow (De...
Charles Plummer	Maple (Lon...

Click on "Bill Adams" in the Resident List...

Bill Adams

Mobility:
Interests:
Special Instructions:

...and then click the "Census" tab.

Face Sheet Interests Participation Observations Progress **Census** To Do's

Resident Status

- Admit
- Transfer Out
- Transfer Back In
- Discharge
- Re-Admit
- Deceased
- Delete Most Recent

Follow Up

- New Progress Note

Save Changes Cancel Changes

...and then click the "Census" tab.

Click the “Admit” command icon.

Bill Adams

Mobility:

Interests: Music, Arts and Crafts

Special Instructions:

Face Sheet Interests Participation Observations Progress Census To Do's

Resident Status

- Admit
- Transfer Out
- Transfer Back In
- Discharge
- Re-Admit
- Deceased
- Delete Most Recent

Follow Up

- New Progress Note

Date	Description	Admitted From	New	Staff
9/6/06	Admitted	Home	P	PA

Click the "Admit" command icon

Save Changes Cancel Changes

In the “Admitted From” field, type “Home”.

Click “Save Changes”.

You’ve successfully created an admission record for this resident. When he’s transferred out or discharged later, you’ll come back here and click the appropriate command icon to update his status.

Notice that there’s also a command icon that says “New Progress Note”. If you click it, the system will automatically take you to the Progress tab, ready to enter a new progress note.

Assigning Resident Interests

Interest Categories are an important part of managing your activity program. You can tell ProActivity Reports which kinds of activities interest each resident, and you can tell it what interest category each activity that you schedule addresses.

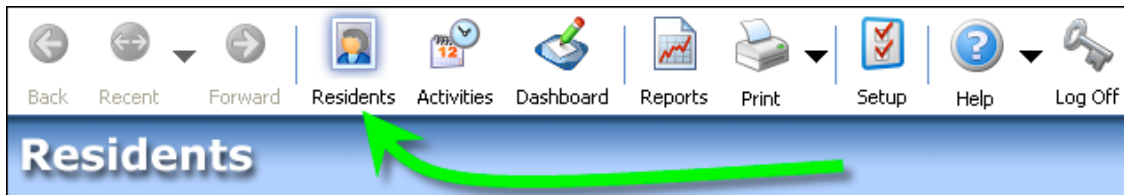
The software will help you make sure that the activities that you're scheduling reflect the interests of your current residents. It will also let you create reports that you can use to demonstrate to state surveyors that your activity program meets or exceeds their interpretive guidelines.

Matching the activities that you offer with the interests of your current residents is the key to creating a better activity program.

If you haven't set up your Interest Categories yet, please see the "Creating Interest Categories" section of this Step-by-Step Guide.

To tell ProActivity Reports which kinds of activities interest a resident, the first step is to select the resident in the Residents screen.

Click the "Residents" icon on the main toolbar at the top of the screen.



Next, select the resident whose interest information you want to enter. For this example, we'll use Bill Adams.

From the Resident List on the left of the Residents screen, click on Bill Adams...

Residents

New Import Delete
Show all current residents in all groups

Name	Group
Bill Adams	Maple (Lon...
Carl Brownfield	Willow (De...
Mary Chambers	Willow (De...
Tom Clouse	Evergreen...
Anna Crawford	Maple (Lon...
Brenda Dean	Evergreen...
Dale Dean	Maple (Lon...
Shirley Hart	Maple (Lon...
Robert Hinton	Willow (De...
Laura Miller	Maple (Lon...
Hazel O'Sullivan	Willow (De...
Charles Plummer	Maple (Lon...

Click on "Bill Adams" in the Resident List...

Bill Adams
Maple (Long Term Care)

Mobility: Interests: Special Instructions:

Face Sheet **Interests** Participation Observations Progress Census To Do's

Preferred Times For Activities
☐ Morning ☐ Afternoon ☐ Evening ☐ Night

Interests:

Description	Details
<input type="checkbox"/> Physical	
<input type="checkbox"/> Cognitive	
<input type="checkbox"/> Music	
<input type="checkbox"/> Arts and Crafts	
<input type="checkbox"/> Outing	

Save Changes Cancel Changes

...and then click the "Interests" tab.

The software shows you your list of Interest Categories (that you defined in the Setup area). You can now tell ProActivity Reports which of these Interest Categories are relevant to this resident.

Let's say that Bill is interested in Music (but only classical music) as well as Arts & Crafts.

**Click the checkbox next to “Music” and the checkbox next to “Arts and Crafts”.
Click in the “Details” area next to “Music”, and then type “classical only”.
Click the “Save Changes” button.**

Residents

New Import Delete
Show all current residents in all groups

Name	Group
Bill Adams	Maple (Lon...
Carl Brownfield	Willow (De...
Mary Chambers	Willow (De...
Tom Clouse	Evergreen...
Anna Crawford	Maple (Lon...
Brenda Dean	Evergreen...
Dale Dean	Maple (Lon...
Ruth Feldman	Maple (Lon...
Bill Fenton	Maple (Lon...
Janet Harrison	Maple (Lon...
Shirley Hart	Maple (Lon...
Robert Hinton	Willow (De...
Laura Miller	Maple (Lon...
Hazel O'Sullivan	Willow (De...
Charles Plummer	Maple (Lon...

Bill Adams
Maple (Long Term Care)

Mobility: [+](#)
Interests: [+](#) Music, Arts and Crafts
Special Instructions: [+](#)

Face Sheet Interests Participation Observations Progress Census To Do's

Preferred Times For Activities
☐ Morning ☐ Afternoon ☐ Evening ☐ Night

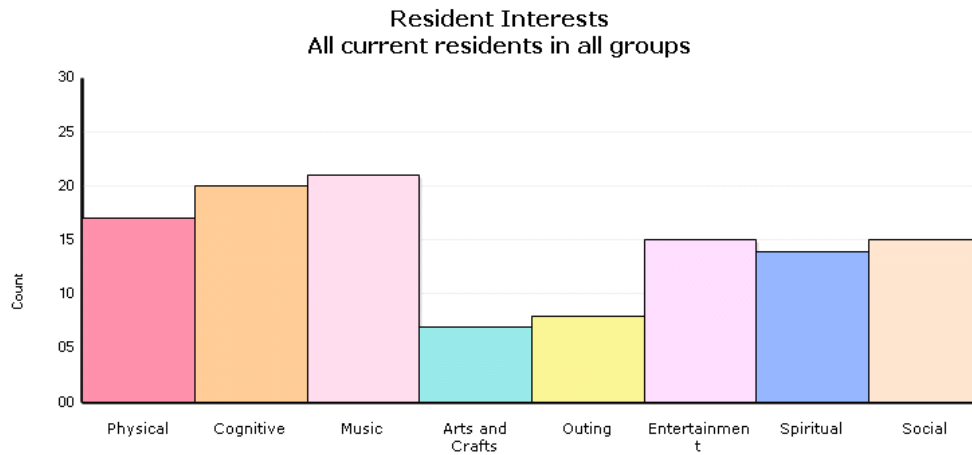
Interests: Music, Arts and Crafts

Description	Details
<input type="checkbox"/> Physical	
<input type="checkbox"/> Cognitive	
<input checked="" type="checkbox"/> Music	classical only
<input checked="" type="checkbox"/> Arts and Crafts	
<input type="checkbox"/> Outing	

Save Changes Cancel Changes

Notice that Bill's interests are now shown in the Resident Header (if you have chosen "Interests" as one of your Preferred Fields).

From the “Reports” screen, you can run reports that help you understand the interests of your current resident population as a whole. For example, you can get a list of all residents who are interested in music. Or you can create a graph that shows how many residents are interested in each Interest Category with a few clicks of the mouse.



Assigning Interest Categories to Activities

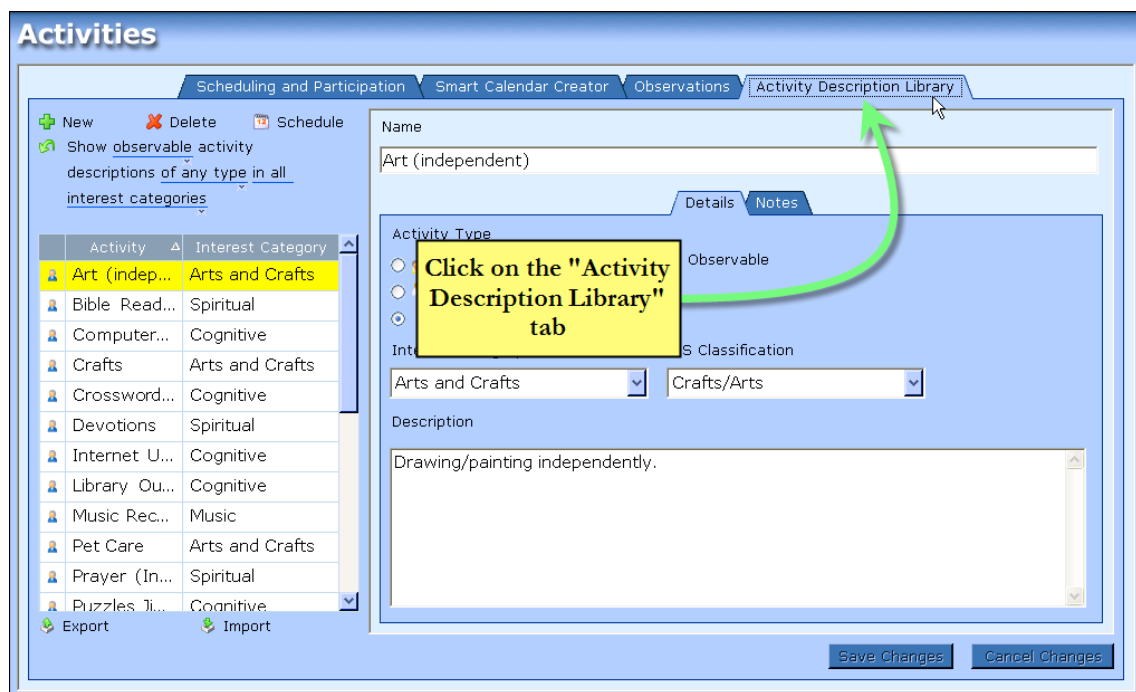
Assigning interest categories to residents is an important first step towards organizing your residents and understanding what sort of activities your residents are interested in.

The next step is to assign interest categories to activities.

Click on the “Activities” icon in the main toolbar at the top of the screen.



Click on the “Activity Description Library” tab.



Click on the “Details” tab.

The screenshot shows the 'Activities' window with the 'Activity Description Library' tab selected. The 'Details' tab is active, displaying the following information:

- Name:** Art (independent)
- Activity Type:** Independent Activity (selected)
- Observable:** ☒
- Interest Category:** Arts and Crafts
- MDS Classification:** Crafts/Arts
- Description:** Drawing/painting independently.

A green arrow points from a yellow box labeled "Details tab" to the 'Details' tab button. The left sidebar shows a list of activities and interest categories, with 'Art (indep...)' and 'Arts and Crafts' highlighted.

To assign an Interest Category to an activity, click on the drop-down box labeled “Interest Category.”

All the interest categories you created in the Setup Section are shown in the drop-down box. You can scroll down the list and choose the interest category that best fits the activity you are working with.

For example, if you'd like to categorize the activity 1:1 Visits as a social interest, you can do so by scrolling down the drop-down box and selecting "Social."

Select the activity "1:1 Visits" from the Activity List on the left side of the screen.

Activities

Schedule

Show all activity descriptions of any type in all interest categories

Activity	Interest Category
1:1 Visits	Cognitive
Activity S...	Cognitive
Animal Bi...	Cognitive
Armchair...	Cognitive
Art (indep...	Arts and Crafts
Balloon Vo...	Physical
Bean Bag...	Physical
Bell Choir	
Bible Read...	
Bible Stud...	Spiritual
Bingo	Cognitive
Book Club	Cognitive

Export Import

Name: 1:1 Vis...

Activity: ☐ Cognitive ☒ 1:1 Visits ☐ I...

Interest: Cognitive

Description: 1:1 co... oppo... side

Select the drop-down box labeled “Interest Category”

Activities

Scheduling and Participation | Smart Calendar Creator | Observations | Activity Description Library

New Delete Schedule

Show all activity descriptions of any type in all interest categories

Activity	Interest Category
1:1 Visits	Cognitive
Activity S...	Cognitive
Animal Bi...	Cognitive
Armchair...	Cognitive
Art (indep...	Arts and Crafts
Balloon Vo...	Physical
Bean Bag...	Physical
Bell Choir	Music
Bible Read...	Spiritual
Bible Stud...	Spiritual
Bingo	Cognitive
Book Club	Cognitive

Export Import

Name: 1:1 Visits

Details Notes

Activity Type

☐ Group Activity ☐ Observable

☒ 1:1 Activity

☐ Independent Activity

Interest Category

Cognitive

MDS Classification

Talking or conversing

no interest category assigned

Physical

Cognitive

Music

Arts and Crafts

Outing

Entertainment

Spiritual

nts, reminiscing, psychological support, spiritual etc., between a staff member or volunteer and a

Save Changes Cancel Changes

Scroll down the drop-down list until you reach “Social.” Select it.

The screenshot shows the 'Activity Description Library' window with the '1:1 Visits' activity selected. The 'Interest Category' dropdown menu is open, showing a list of categories: Physical, Cognitive, Music, Arts and Crafts, Outing, Entertainment, Spiritual, and Social. The 'Social' category is highlighted at the bottom of the list. A yellow callout box with the text 'Click "Social" in the drop-down box.' has two green arrows pointing to the 'Social' option in the dropdown list. The 'MDS Classification' dropdown is set to 'Talking or conversing'. The 'Activity Type' section shows '1:1 Activity' selected. The 'Save Changes' and 'Cancel Changes' buttons are at the bottom right.

Click “Save Changes.”

“1:1 Visits” now has “Social” as its interest category.

You can follow the same process for all of your activities. The interest category will show up next to the name of the activity in the “Activity List” on the left side of the screen. If you click the gray heading “Interest Category,” the list will re-appear sorted in order of interest categories.

Activities

Click here to organize the list by Interest Category

	Activity	Interest Category
	Bowling	Physical
	Exercise	Physical
	Yoga	Physical
	Parachute	Physical
	Walking	Physical
	Table Voll...	Physical
	Dance Da...	Physical
	Nature Wa...	Physical
	Happy Hour	Social
	Coffee Soc...	Social
	1:1 Visits	Social
	Holiday Pa...	Social

Export Import

Name: 1:1 Vis...

Activity: ☐ 0 ☒ 1 ☐ 1

Interest: Social

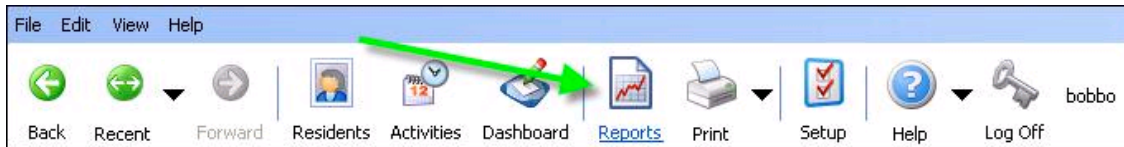
Description: 1:1 co support reside

Interest Reports

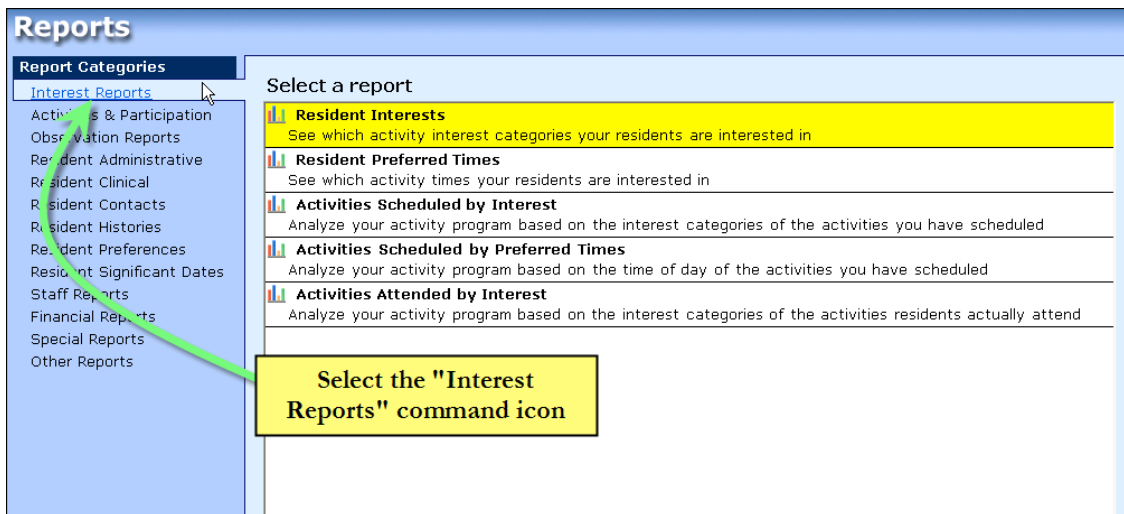
Once you have assigned Interest Categories to your residents and your activities, you can use this information to help you plan activities that your residents are interested in.

The “Interest Reports” section of the “Reports” screen offers several reports that show you interest information.

Click on the “Reports” icon on the main toolbar.



Click “Interest Reports” from the left panel.



There are several types of Interest Reports that you can choose from. For example, you can see which of your residents is interested in music by running the “Resident Interests” report.

Select the “Resident Interests” report from the list. Then click the “Show Report” icon at the bottom of the page.

The screenshot displays a web application interface for generating reports. On the left, a sidebar titled 'Reports' contains a 'Report Categories' section with a list of report types. A green arrow points from the 'Resident Interests' category in this list to the 'Resident Interests' report in the main content area. The main content area, titled 'Select a report', lists several reports with brief descriptions. A second green arrow points from a yellow callout box to the 'Show Report' button at the bottom right of the report list.

Reports

Report Categories

- Interest Reports
- Activities & Participation
- Observation Reports
- Resident Administrative
- Resident Clinical
- Resident Contacts
- Resident Histories
- Resident Preferences
- Resident Significant Dates
- Staff Reports
- Financial Reports
- Special Reports
- Other Reports

Select a report

- Resident Interests**
See which activity interest categories your residents are interested in
- Resident Preferred Times**
See which activity times your residents are interested in
- Activities Scheduled by Interest**
Analyze your activity program based on the interest categories of the activities you have scheduled
- Activities Scheduled by Preferred Times**
Analyze your activity program based on the time of day of the activities you have scheduled
- Activities Attended by Interest**
Analyze your activity program based on the interest categories of the activities residents actually attend

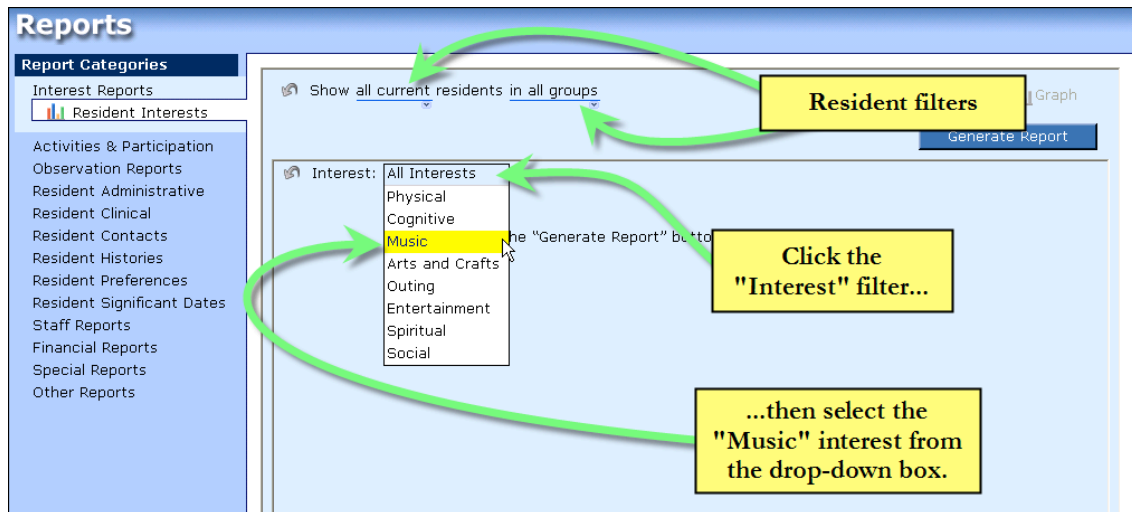
Select the "Resident Interests" report...

...then click the "Show Report" command icon

Show Report

To show which of your residents are interested in music, you can use the filters that appear at the top of the page.

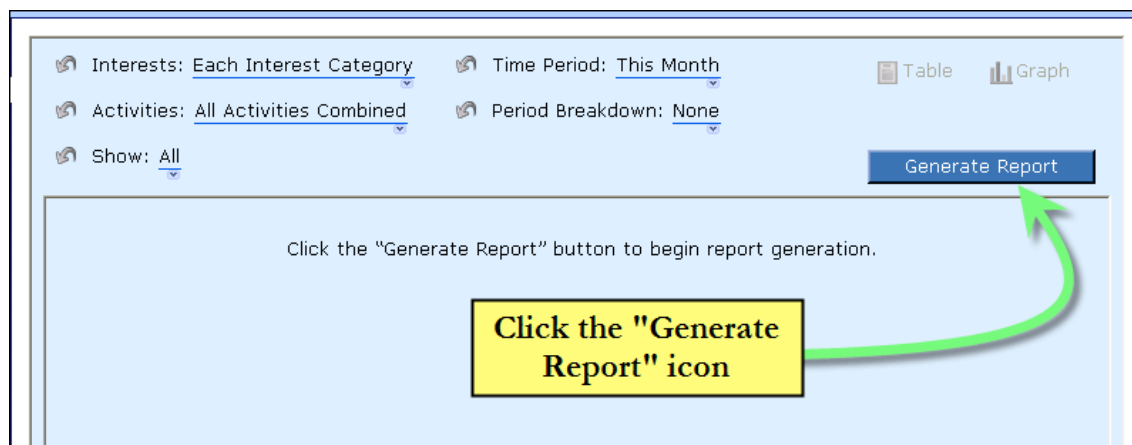
Click on the “Interests” filter. A drop-down box should appear. Select “Music” from the list.



You can also use the resident filters to control which residents appear in the report.

After you have selected the interest you want, you can click the “Generate Report” icon to produce the report.

Click the “Generate Report” icon.



After clicking “Generate Report,” here is how your report could look:

The screenshot shows a web application interface. At the top, there's a navigation bar with a "Show all current residents in" dropdown. Below it, a filter is set to "Interest: Music". A toolbar includes a "Print this Document" button, a page indicator "1 of 2", a font selector "Verdana", and a size selector "10". In the top right corner, there are two icons: a "Table" icon (highlighted with a yellow box and labeled "Table" icon) and a "Graph" icon (highlighted with a yellow box and labeled "Graph" icon). Below these icons is a "Generate Report" button (highlighted with a yellow box). The main content area displays a table titled "Resident Interests" with the subtitle "all current residents in all groups" and "Music". The table has five columns: "Resident", "Room", "Group", "Interest", and "Comment". The first three columns are highlighted in blue and labeled "Headings" with green arrows. The table contains six rows of data.

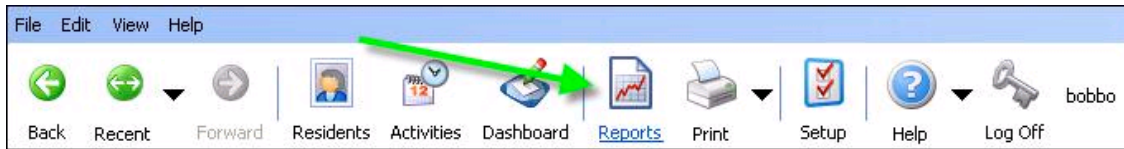
Resident	Room	Group	Interest	Comment
Bill Adams		no group assigned	Music	classical only
Carl Brownfield	153	Willow (Dementia)	Music	Bluegrass, Hymns
Mary Chambers	161	Willow (Dementia)	Music	Hymns, Ella Fitzgerald, Blues
Tom Clouse	126	Evergreen (Rehabilitation Unit)	Music	40's and 50's, Frank Sinatra
Anna Crawford	109	Maple (Long Term Care)	Music	Classical, esp Mozart and Beethoven
Brenda Dean	132	Evergreen	Music	any

This report appears as a Table, with all the current residents interested in “Music” listed alphabetically. To make a report appear as a Graph, click the “Graph” icon in the top-right corner of the screen. To make a report appear as a Table, click the “Table” icon in the corner of the screen.

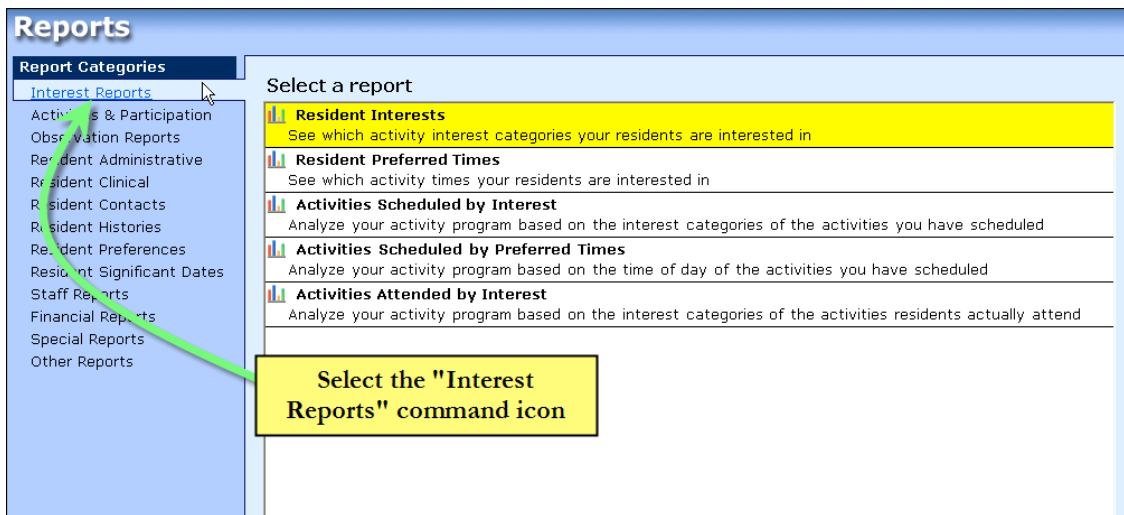
By clicking on the headings highlighted in blue, you can sort the residents by name, room number, or group.

Knowing your residents' interests can be helpful for planning your activities. If you are planning activities for a certain group of residents, having all their interests available in a report form can help the planning process go more quickly. Using the reports section of ProActivity Reports can help you generate a list or graph of all your residents' interests.

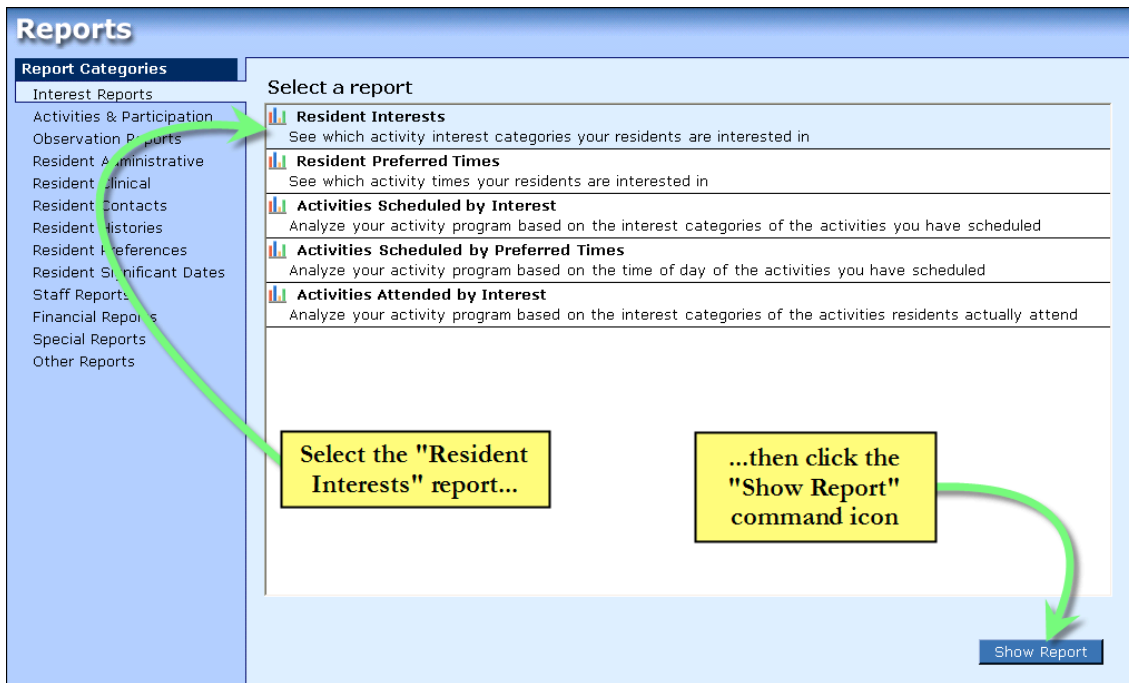
Click on the "Reports" icon in the main toolbar.



Select "Interests Reports" from the left panel.

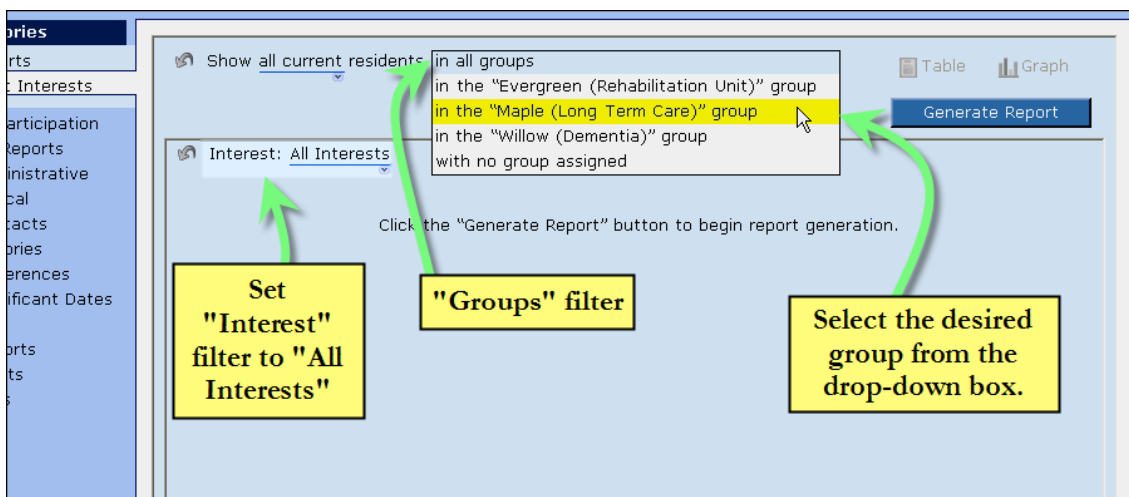


Select the “Resident Interests” report from the list. Then click the “Show Report” icon at the bottom of the page.

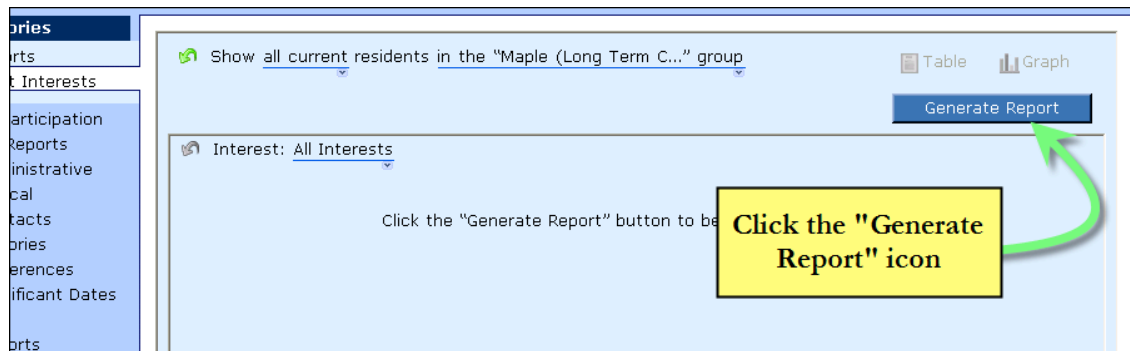


For this example, we'll use the Maple Group (Long Term Care) from the Training System. You can select the group you are interested in.

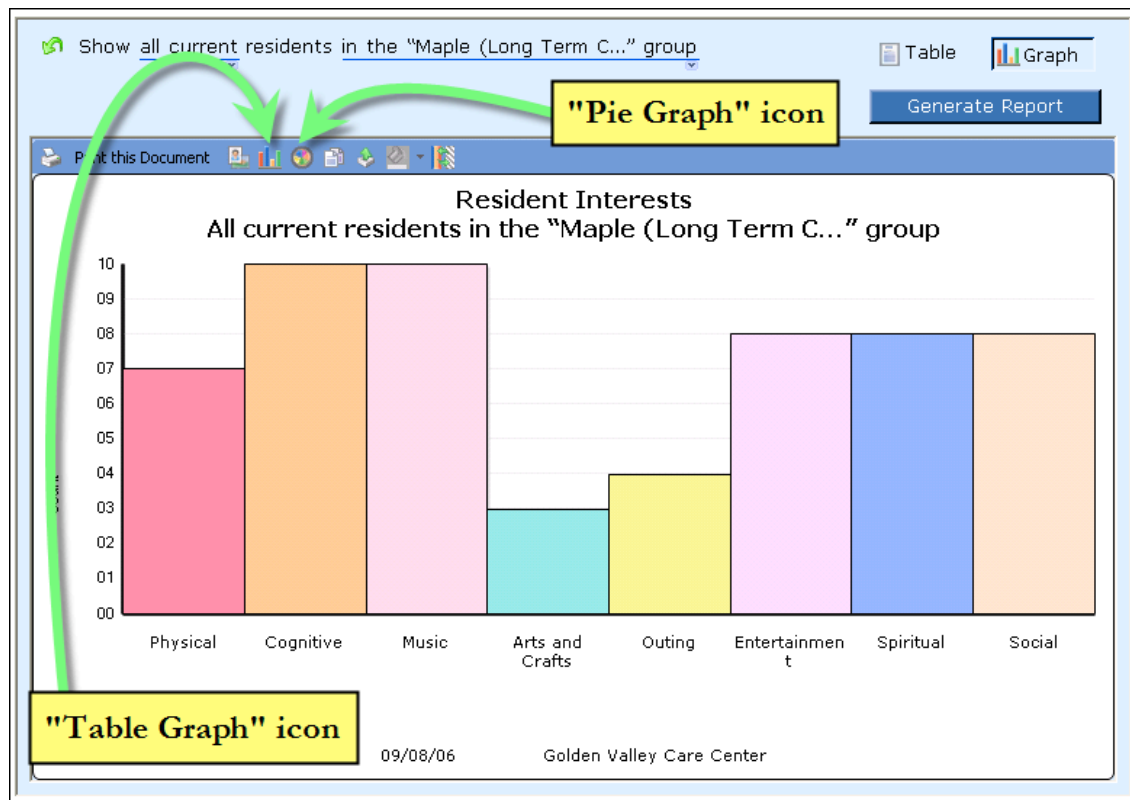
Click on the “Groups” filter. Select the group you are interested in from the drop-down box. Make sure that the “Interest” filter is set on “All Interests.”



Click the “Generate Report” icon.



For graphs, you can choose between pie and bar graphs. To choose a pie graph display, click on the “Pie Graph” icon. To choose a bar graph display, click on the “Bar Graph” icon.



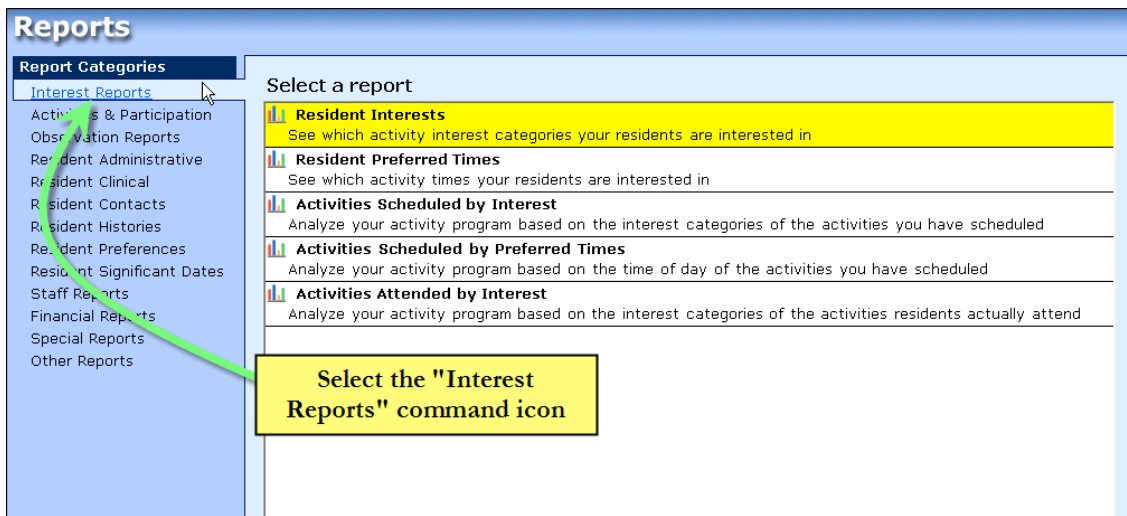
The graph shows you what interests the residents in this group have, and it shows you the most common interests for this group. Since most residents in this group share cognitive and music interests, activities that fall into these categories will likely be the most attended and participated-in activities.

Another tool in the reports section you can use is to show your “Activities Scheduled by Interest”. Using this report with the “Resident Interests” report we just explored above can be especially helpful because you can make sure you are scheduling activities that are of interest to your residents.

Click on the “Reports” icon in the main toolbar.



Select “Interest Reports” from the left panel.



Select the “Activities Scheduled by Interest” report. Then click on the “Show Report” icon.

The screenshot displays a web application interface for generating reports. On the left, a sidebar titled "Reports" contains a "Report Categories" section with a list of report types. The "Interest Reports" category is expanded, showing a list of reports. A green arrow points from a yellow callout box to the "Activities Scheduled by Interest" report. The main content area, titled "Select a report", lists five reports with their descriptions. The "Activities Scheduled by Interest" report is highlighted in blue. A second yellow callout box points to a "Show Report" button at the bottom right of the report list.

Reports

Report Categories

- Interest Reports
 - Activities & Participation
 - Observation Reports
 - Resident Administrative
 - Resident Clinical
 - Resident Contacts
 - Resident Histories
 - Resident Preferences
 - Resident Significant Dates
 - Staff Reports
 - Financial Reports
 - Special Reports
 - Other Reports

Select a report

- Resident Interests**
See which activity interest categories your residents are interested in
- Resident Preferred Times**
See which activity times your residents are interested in
- Activities Scheduled by Interest**
Analyze your activity program based on the interest categories of the activities you have scheduled
- Activities Scheduled by Preferred Times**
Analyze your activity program based on the time of day of the activities you have scheduled
- Activities Attended by Interest**
Analyze your activity program based on the interest categories of the activities residents actually attend

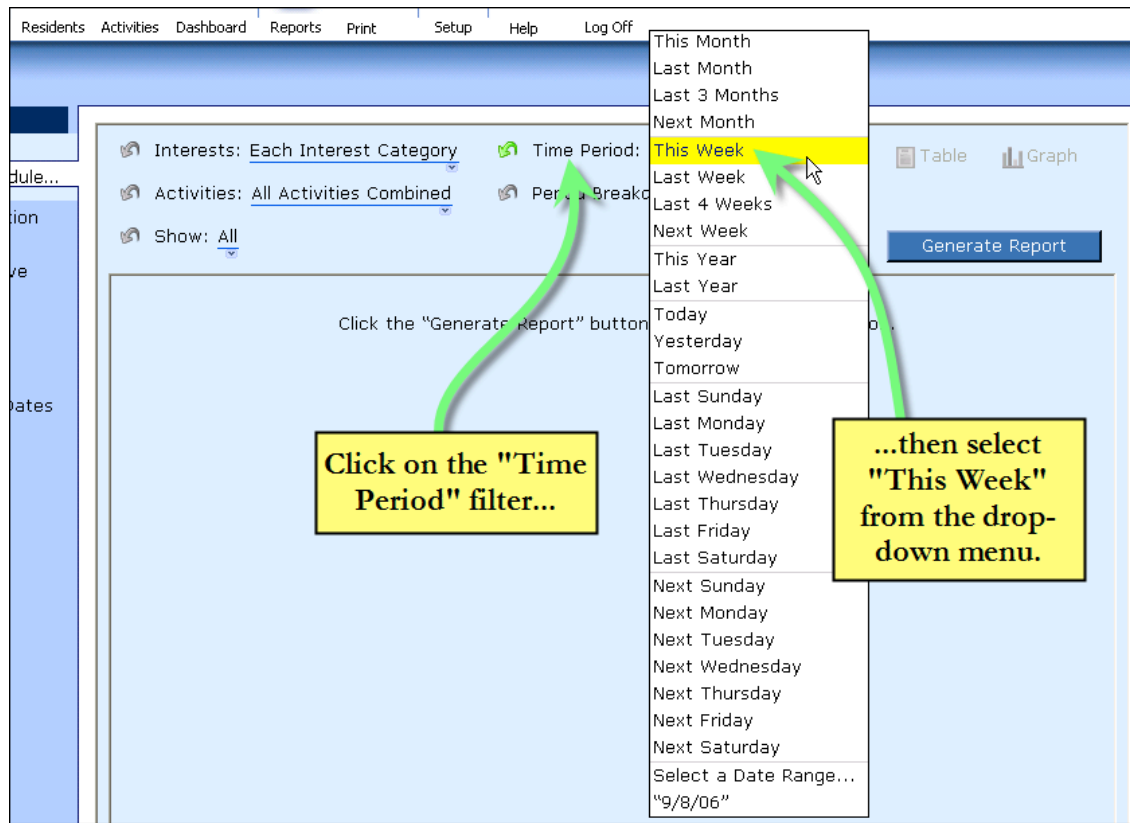
Select the "Activities Scheduled by Interest" report...

...then click the "Show Report" icon.

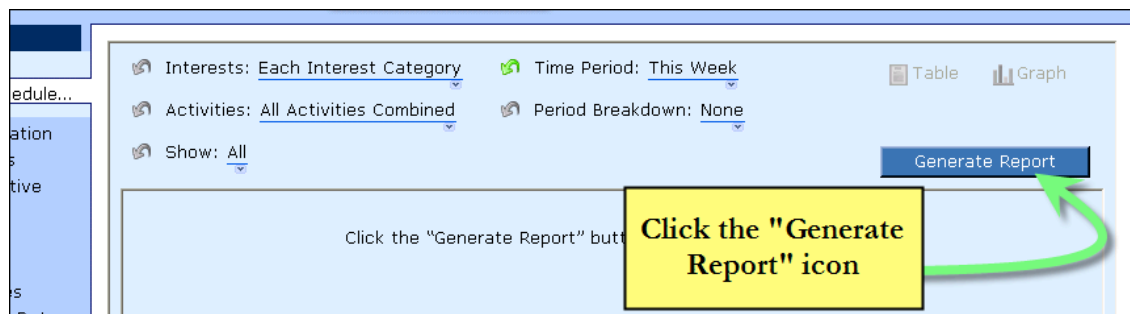
Show Report

There are five filters for this report. You can control which interests and activities are shown, which residents are shown, and what time period the report covers. For this example, we're going to leave all the filters at their default settings except the time period.

Click the "Time Period" filter. Select "This Week" from the drop-down menu.

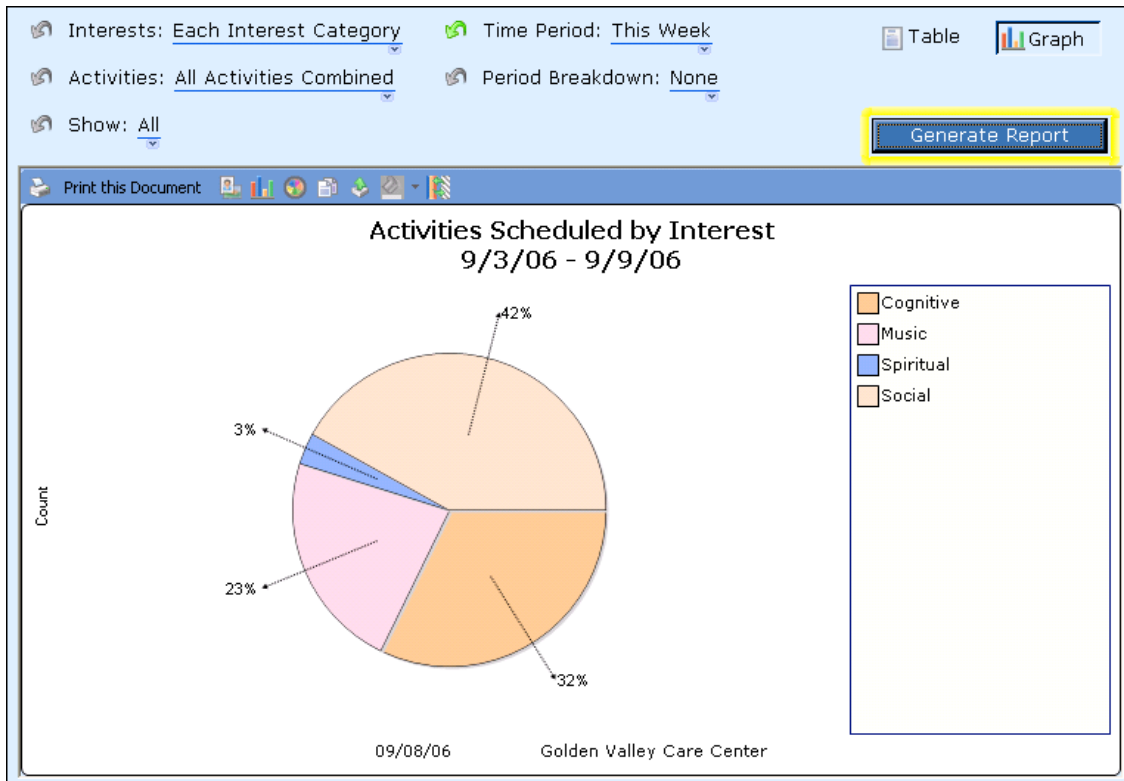


Click the "Generate Report" icon.



This report appears as a pie graph. You can change it to a bar graph by clicking the “Bar Graph” icon. You can change it to a Table by clicking the “Table” icon.

The graph shows you, by percentage, how many activities for each interest category were scheduled for this week. In this example, 42 percent of activities that were scheduled belonged to the “Social” interest category. Cognitive activities made up 32% of all activities scheduled.

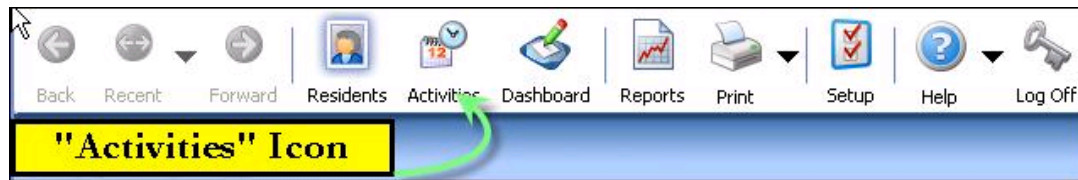


Using the Interest reports can be an efficient and dynamic way of evaluating your activity program.

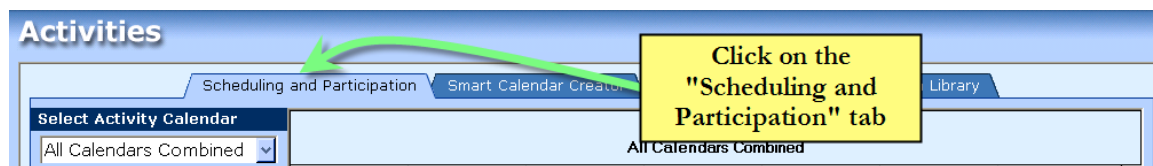
Creating New Activities

Creating new activities takes place in the “Scheduling and Participation” tab of the Activities section of ProActivity Reports.

Click on the “Activities” icon in the main toolbar.



Click on the “Scheduling and Participation” tab.



The “Scheduling and Participation” tab contains a lot of information and has many different tools you can use. To create a new activity, click on the “New Activity” command icon.

Click on the "New Activity" command icon.

Activities

Scheduling and Participation | Smart Calendar Creator | Observation

Select Activity Calendar
All Calendars Combined

2006 Sep
S M T W T F S
27 28 29 30 31 1 2
3 4 5 6 7 8 9
10 11 12 13 14 15 16
17 18 19 20 21 22 23
24 25 26 27 28 29 30
1 2 3 4 5 6 7
Today

Day Week Month
Planner List

Activities

- + New Activity
- Edit Activity
- Delete Activity
- Cancel Activity

Participation

- Record Participation

Display

Verdana 10

September
All Calendars Combined

3	4	5	
8:30 Chu...	8:00 Ne...	8:00 Cof...	8:00 Ne...
10:00 Ca...	10:00 M...	10:00 M...	10:00 M...
10:00 M...	11:00 Ca...	12:00 Pe...	11:00 Ba...
	12:00 Pe...	12:00 Sn...	11:00 Pe...
	1:00 Mo...	2:00 Gar...	12:00 Pe...
	3:00 Re...	3:00 Re...	3:00 Re...
	4:00 Hap...	4:00 Hap...	4:00 Hap...
			5:00 Mo...
10	11	12	
9:00 Cathol...	8:00 Ne...	8:00 Cof...	8:00 Ne...
9:00 Chu...	9:00 Bean...	8:00 Coffe...	9:30 Coffe...
10:00 M...	10:00 M...	10:00 M...	10:00 M...
	12:00 Pe...	12:00 Pe...	12:00 Pe...
	2:00 Cre...	3:00 Re...	3:00 Re...
	4:00 Hap...	4:00 Hap...	4:00 Hap...
			5:00 Mo...
17	18	19	
8:30 Churc...	8:00 Ne...	8:00 Cof...	8:00 Ne...

Click on the "New Activity" command icon

After you click the “New Activity” command icon, a dialog box appears on the screen. Inside the dialog you can customize, name, schedule and describe an activity.

At the top of the dialog is an entry field for the activity type, where you can decide if it is a group activity, a 1:1 activity, or an Independent activity. There is a drop-down menu where you can choose the activity description. There is also space for the activity name. The software comes with built-in activities, and you can customize them or add new activities.

The screenshot shows the 'New Scheduled Activity' dialog box. At the top, the 'Activity Type' is set to 'Group'. Below this, the 'Select Activity Description' dropdown menu is highlighted with a yellow box and labeled 'Activity Description'. The dropdown currently shows 'Animal Bingo (Cognitive)'. To the right of this dropdown is a 'Browse...' button. Below the dropdown is a text field for '(Optional) Custom Title' containing 'Animal Bingo', which is labeled 'Activity Title'. The dialog has several tabs: 'Activity', 'Repeat', 'Staff', and 'Residents & Participation'. The 'Activity' tab is active. It contains fields for 'Date' (9/8/06), 'Location' (no location assigned), 'Start Time' (04:00 PM), 'Cost' (0.00), and 'End Time' (05:00 PM). There are also checkboxes for 'Cancelled' and 'Hide on Smart Calendar'. Below these fields are buttons for 'Repeat' and 'Single instance', and a 'Staff' button. A section labeled 'Show this Activity on calendars' has checkboxes for 'Low Functioning' and 'High Functioning'. A 'Comments' text area is at the bottom. The 'Created by' field shows 'Paula Andersen'. At the bottom right are 'Save' and 'Cancel' buttons. Green arrows point from the labels to their respective fields: from 'Activity Title' to the custom title field, from 'Activity Description' to the dropdown menu, and from 'Activity Type' to the activity type radio buttons.

New Scheduled Activity

Activity Type: ☒ Group ☐ 1:1 ☐ Independent

Select Activity Description

Animal Bingo (Cognitive) Browse...

(Optional) Custom Title

Animal Bingo

Activity Repeat Staff Residents & Participation

Date 9/8/06 Location no location assigned

Start Time 04:00 PM Cost 0.00

End Time 05:00 PM ☐ Cancelled ☐ Hide on Smart Calendar

Repeat Single instance

Staff

Activity Title

Activity Description

Activity Type

Show this Activity on calendars

☒ Low Functioning ☒ High Functioning

Low Functioning, High Functioning

Comments

Created by Paula Andersen

Save Cancel

Click the “Select Activity Description” drop-down tab.

New Scheduled Activity

Activity Type: ☒ Group ☐ 1:1 ☐ Independent

Select Activity Description

Animal Bingo (Cognitive)

Animal Bingo (Cognitive)

Armchair Travel (Cognitive)

Balloon Volleyball (Physical)

Bell Choir (Music)

Bingo (Cognitive)

Book Club (Cognitive)

Bowling (Physical)

Card Club (Cognitive)

Catholic Mass (Spiritual)

Charades (Cognitive)

Choir (Music)

Circle Ball (Physical)

Coffee Social (Social)

Browse...

Show this Activity on the checked Calendars

☒ Low Functioning

☒ High Functioning

Low Functioning, High Functioning

Comments

Created by Paula Andersen

Save Cancel

There are dozens of activity descriptions for you to choose from. For this example, however, we're going to choose Bingo.

Scroll down the drop-down menu and select "Bingo."

The date for the activity defaults to today's date. The starting and ending times have drop down menus, and you can choose starting and ending times on the hour and half hour. However, if you have an activity that starts at another time (like on the quarter hour) you can click on the time and edit it manually.

Your software may already be set to change the end time to one hour later than the start time. As soon as you select a start time, the end time will immediately change to one hour later. If you'd like the activity to have a duration other than one hour, you can change the activity's scheduled end time by clicking the drop-down menu and selecting a different time, or by manually changing the end time.

You can also choose the location of the activity with a drop-down menu. You can enter the cost of an activity as well.

Click the “Start Time” drop-down menu. Select 6:30 p.m.

Click the “End Time” drop-down menu. Select 7:30 p.m.

Click the “Location” drop-down menu. Select “Activity Room”

Click the “+” button to the right of the cost box. Click it five times. The cost should read “5.00”

New Scheduled Activity

Activity Type: ☒ Group ☐ 1:1 ☐ Independent

Select Activity Description
Bingo (Cognitive) Browse...

(Optional) Custom Title
Bingo

Activity **Repeat** **Staff** **Residents & Participation**

Date: 9/8/06 Location: Activity Room

Start Time: 06:30 PM Cost: 5.00 + -

End Time: 07:30 PM ☐ Cancelled ☐ Hide on Smart Calendar

Repeat Single instance

Staff Paula Andersen

Show this Activity on the checked Calendars

☒ Low Functioning ☒ High Functioning **Low Functioning, High Functioning**

Comments

Created by Paula Andersen

Save **Cancel**

You can also choose to have an activity appear only on certain specific calendars. When you create calendars, they will automatically appear in the white box in the middle of the screen. From the calendars you have created, you can choose which calendars the activity will show up on. You can do this by checking the box next to the Calendars you want this activity to appear on.

For our example, we want Bingo to only appear on the “High Functioning” calendar. We can click on the box next to “High Functioning” to select it.

Repeat Single instance

Staff Paula Andersen

Show this Activity on the checked Calendars

☐ Low Functioning

☒ High Functioning

Comments

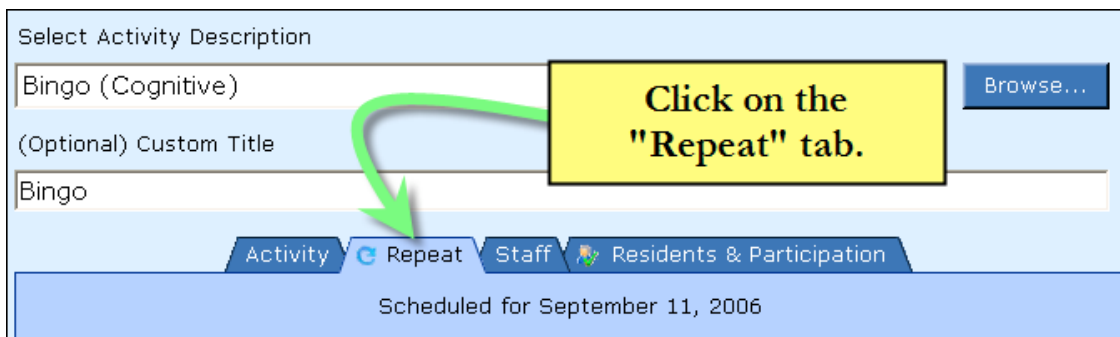
Created by Paula Ar

Save Cancel

Select the calendar this activity should appear on

For more on working with multiple calendars, please see the section entitled “Calendar Names.”

Select the “Repeat” tab.



The screenshot shows a software interface with a light blue background. At the top, there is a label "Select Activity Description" above a text input field containing "Bingo (Cognitive)". To the right of this field is a blue button labeled "Browse...". Below the first field is another label "(Optional) Custom Title" above a text input field containing "Bingo". At the bottom of the form is a horizontal tab bar with four tabs: "Activity", "Repeat", "Staff", and "Residents & Participation". The "Repeat" tab is highlighted with a blue background and a small circular icon. A yellow callout box with a black border and the text "Click on the 'Repeat' tab." has a green arrow pointing to the "Repeat" tab. Below the tab bar, the text "Scheduled for September 11, 2006" is displayed.

The “Repeat” tab helps you schedule your activity so that it automatically repeats on a daily, weekly, monthly, or yearly basis. For example, using the tools available in this tab, you can schedule an event to occur every other Monday, every day, or the second Thursday of every month.

For our example, let's say you would like to schedule Bingo every Tuesday and Thursday.

Click on the "Week" icon to select it. Days of the week should appear.

Click on the boxes next to Tuesday (T) and Thursday (H).

The screenshot shows the 'New Scheduled Activity' form. At the top, 'Activity Type' is set to 'Group'. The 'Select Activity Description' dropdown is set to 'Bingo (Cognitive)', with a 'Browse...' button next to it. Below this is an 'Optional Custom Title' field containing 'Bingo'. The 'Repeat' tab is selected, showing the scheduling options. The text 'Scheduled for September 11, 2006' is displayed. Under 'Select how often this appointment should repeat:', the 'Week' radio button is selected. Below this, 'Every' is set to '1' with '+' and '-' icons, followed by 'Week(s)'. The 'End on' dropdown is set to 'Never ends'. The 'Repeat on' section shows checkboxes for days of the week: S, M, T, W, H, F, S. The 'T' and 'H' checkboxes are checked. A text box below this shows 'Every Tuesday and Thursday'. At the bottom right are 'Save' and 'Cancel' buttons. Two yellow callout boxes with green arrows provide instructions: one points to the 'Week' radio button with the text 'Select the "Week" icon', and the other points to the 'T' and 'H' checkboxes with the text 'Select "Tuesday" and "Thursday"'. The 'T' checkbox is highlighted with a green background.

There are also tools on this screen that can help you control the scheduling of an activity. You can use the +/- icons to control how often an event occurs. You can schedule an activity to occur every other week or every third week, for example. You can also decide when you would like an event to end. For outside events during the summer, for example, you could have them repeat every week until the end of September.

Select the "Staff" tab.

New Scheduled Activity

Activity Type: ☒ Group ☐ 1:1 ☐ Independent

Select Activity Description
Bingo (Cognitive) Browse...

(Optional) Custom Title
Bingo

Activity **Repeat** **Staff** **Residents & Participation**

Select Staff and assign to this Activity

Show active staff

	Name	D
	James Davis	A
	Tracy Lyttle	A

"Active" staff

Assigned Staff

Name
Paula Andersen

"Assigned" staff

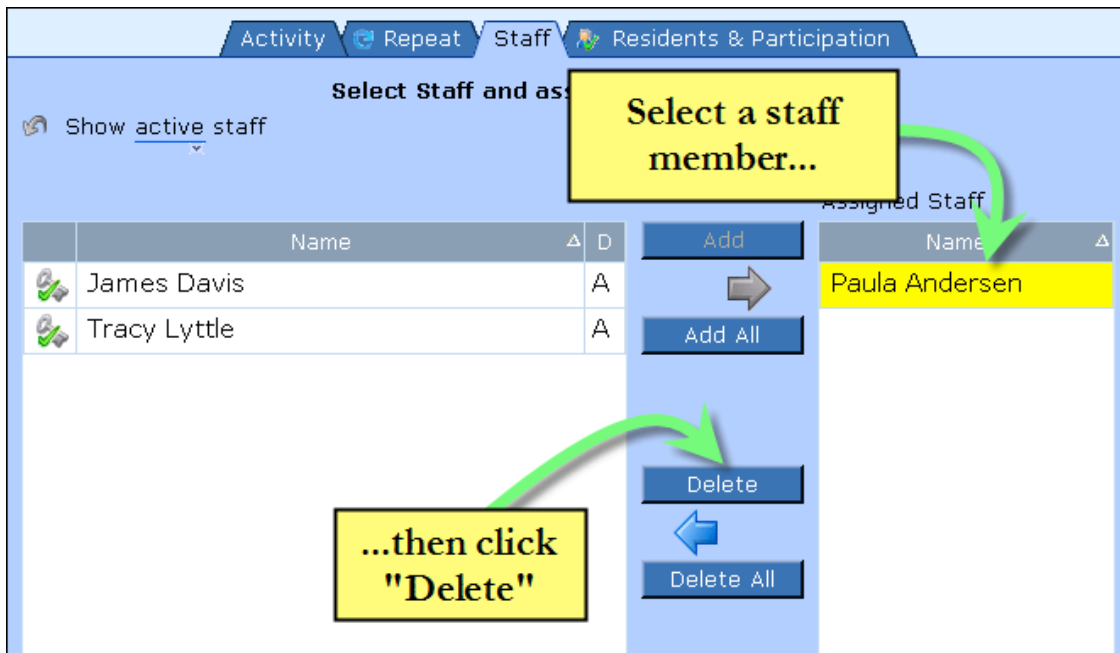
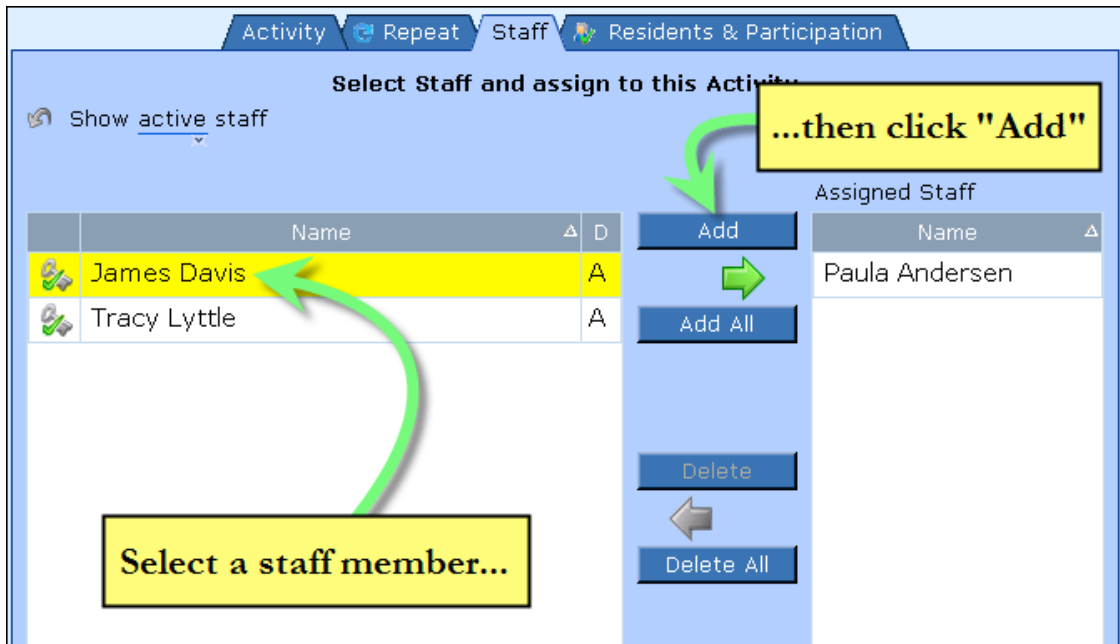
Add **Add All** **Delete** **Delete All**

Save **Cancel**

The "Staff" tab assigns staff members to activities. This screen helps you assign staff to your activity, or to change staff members. The list on the left contains all the active staff members who are not assigned to the event, and the list on the right contains all the staff members who are assigned to a given activity.

To add a staff member to the activity, select his name from the “Active” staff list and click the “add” button.

To remove a staff member from the activity, select his name from the “Assigned” staff list and click the “Delete” button.



Click on the “Residents & Participation” tab.

Select Activity Description

Bingo (Cogniti

(Optional) Custo

Bingo

Browse...

Activity Repeat Staff **Residents & Participation**

Started on September 4, 2006

Show all current residents in all groups

	Name	Group	0	1	2	3	4	5	6	7
			Signed-Up	N/A	Independ...	Verbal Pr...	Physical P...	Passive	Disruptive	Refused
	Carl Brownfield	Willow (...)								
	Mary Chambers	Willow (...)								
	Tom Clouse	Evergree...								

The “Residents & Participation” tab helps you keep track of which of your residents participated in a scheduled activity, and what their level of participation was. To record participation, select the box that corresponds to the resident and the level of participation that best describes how the resident behaved during the activity.

The “Residents & Participation” tab is used after an event has already been scheduled, and the residents have participated in the activity. Therefore, when scheduling a new activity, you probably won’t need to use the “Residents & Participation” tab.

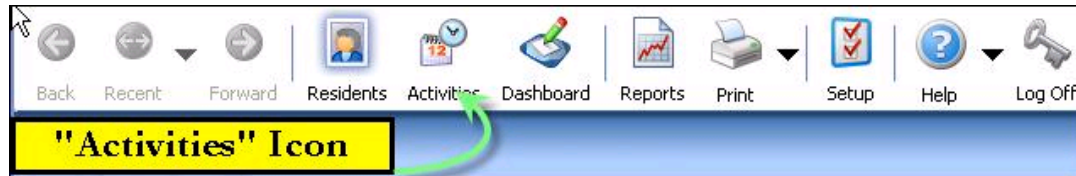
When you are finished creating your activity, click “Save” to save the activity you created. It will now appear in the calendar in “Scheduling and Participation.”

Click “Save.”

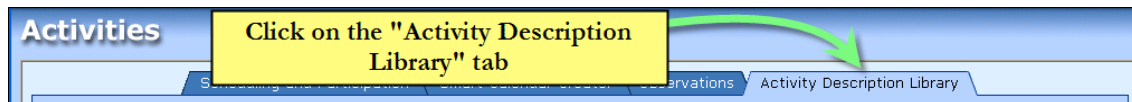
Making Activities Observable

Many of the activities that appear in ProActivity Reports are structured and scheduled. However, many residents also participate in less structured, more self-directed activities, like doing a crossword puzzle or writing letters. ProActivity Reports can help you keep track of how your residents engage in these kinds of activities, too.

Navigate to the “Activities” screen.



Click on the “Activity Description Library” tab.



On the left side of the screen, all of the activities are listed alphabetically.

You can make any activity you see trackable as an unstructured, self-directed event that a resident does on her own an observable activity. By making an activity observable, it will appear on your list of observable activities. You can print out a worksheet of all your observable activities, which you can hand out to your facility staff so they can record observations throughout the day.

ProActivity Reports comes with over 150 activities built in, and since they wouldn't *all* fit on one worksheet, the system needs a way to know which ones you want to include. By marking an activity "observable" in the Activity Description Library, it will appear on your worksheet. To make an activity "observable," select it and check the box marked "Observable."

From the Activity List on the left, select an activity.

Activities Training System

Scheduling and Participation | Smart Calendar Creator | Observations | Activity Description

+ New ✖ Delete 📅 Schedule

Show all activity descriptions of any type in all interest categories

Activity	Interest Category
Crossword...	Cognitive
Crossword...	Cognitive
Current Ev...	Cognitive
Dance Dan...	Physical
Devotional...	Spiritual
Devotions	Spiritual
Egg Colori...	Arts and Crafts
Election U...	Cognitive
Email	Cognitive
Entertain...	Music
Euchre	Cognitive
Exercise	Physical

Export Import

Name: Devotions

Details Notes

Activity Type: ☐ Group ☐ 1:1 A ☒ Independent Activity

Interest Category: Spiritual MDS Classification: Spiritual/Religious activity

Description: Devotional reading, recitation or rituals on an independent chapel visit. To promote spiritual understanding and com

Select an activity from the list.

In the center of the screen, click the box labeled “Observable.”

The screenshot shows the 'Activity Description Library' window with the 'Devotions' activity selected. The 'Observable' checkbox is checked and highlighted with a yellow box. A green arrow points to the checkbox, and a yellow callout box contains the text: 'Click the boxed marked "Observable" so that a check mark appears.'

Activity	Interest Category
Crossword...	Cognitive
Crossword...	Cognitive
Current Ev...	Cognitive
Dance Dan...	Physical
Devotional...	Spiritual
Devotions	Spiritual
Egg Colori...	Arts and Crafts
Election U...	Cognitive
Email	Cognitive
Entertain...	Music
Euchre	Cognitive
Exercise	Physical
Export	Import

Activity Type: ☒ Observable

Interest Category: Spiritual

NDS Classification: Spiritual/Religious activities

Description: Devotional reading, recitation, chapel visit. To promote spiritual growth. Frequency: daily

Buttons: Save Changes, Cancel Changes

Click “Save Changes.”

You have made your activity observable! It will now automatically appear on your Observations Worksheets and reports.

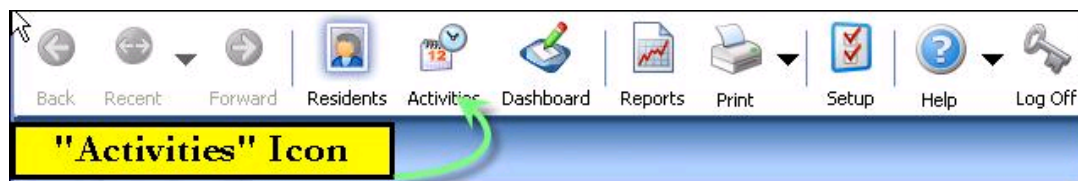
Recording Participation

There are several ways to record resident participation in *scheduled* activities (activities that appear on your activity calendars) in ProActivity Reports. You can record and view an individual's participation on the Resident Participation page in the Residents Area.

Note that "Recording Participation" is different from "Observations". Observations are for less structured, more self-directed resident activities. For a detailed explanation of the difference, please see the sections titled "Recording Observations".

You can also record participation in scheduled activities for *multiple* residents at one time in the "Activities" screen.

Navigate to the "Activities" screen by clicking on the "Activities" icon in the main toolbar.



Click on the "Scheduling and Participation" tab.



Click on the scheduled activity you want to record participation for in the calendar.

Then click "Record Participation."

Activities **Training System**

Scheduling and Participation Smart Calendar Creator Observations Activity Description Library

Select Activity Calendar
All Calendars Combined

Sep 2006
S M T W T F S
27 28 29 30 31 1 2
3 4 5 6 7 8 9
10 11 12 13 14 15 16
17 18 19 20 21 22 23
24 25 26 27 28 29 30
1 2 3 4 5 6 7
Today

Day Week Month
Planner List

Activities
New Activity
Edit Activity
Delete Activity
Cancel Activity

Participation
Record Participation

Display
Verdana 10

September 2006
All Calendars Combined

3 4 5 6 7 8 9
8:30 Chu... 8:00 Ne... 8:00 Cof... 8:00 Ne... 8:00 Cof... 8:00 Ne... 10:00 Mu...
10:00 Ca... 10:00 M... 10:00 M... 10:00 M... 10:00 M... 8:00 Yog... 10:00 Yo...
10:00 M... 11:00 Ca... 12:00 Pe... 11:00 Ba... 12:00 Pe... 10:00 M... 11:00 Ne...
12:00 Pe... 12:00 Sn... 11:00 Pe... 10:00 Pe... 12:00 Ma...
1:00 Mo... 2:00 Gar... 3:00 Re... 4:00 Hap... 7:00 Mu... 4:00 Hap...
4:00 Hap... 4:00 Hap... 5:00 Mo...

10 11 12 13 14 15 16
9:00 Cathol... 8:00 Ne... 8:00 Cof... 8:00 Ne... 8:00 Cof... 8:00 Ne... 9:00 Exerci...
9:00 Chu... 9:00 Bean... 8:00 Coffe... 9:30 Coffe... 10:00 M... 10:00 M... 10:00 Mu...
10:00 M... 10:00 M... 10:00... 10:00 M... 12:00 Pe... 12:00 Pe... 11:30 Devo...
12:00 Pe... 11:30 Hym... 12:00 Pe... 1:00 Sing... 1:30 Card... 12:00 Ma...
2:00 Creati... 12:00 Pe... 1:00 Creati... 1:30 Trivia... 2:00 Poker... 4:00 Hap...
3:00 Re... 3:00 Re... 3:00 Re... 3:00 Re... 3:00 Re... 4:00 Hap...
4:00 Hap...

17 18 19 20 21 22 23
8:30 Churc... 8:00 Ne... 8:00 Cof... 8:00 Ne... 8:00 Cof... 8:00 Ne... 10:00 Gard...

Select an activity....

...then click "Record Participation"

After you click “Record Participation,” a box pops up. This box shows a graph where you can record how each resident participated in the activity, according to the participation levels you created in Set-Up. For more information on how to set your participation levels, please see the section entitled “Participation Levels.”

You can record participation for a resident by clicking on the box that corresponds to both her name and the level at which she participated in the event. In the example below, Carl Brownfield participated in “Music and Massage” independently, while Brenda Dean was disruptive during the activity.

Record Participation

Music and Massage (Music and Massage)

September 12, 2006 at 10:00 AM

Show all current residents in all groups

Name	Group	0 Signed-Up	1 N/A	2 Independent...	3 Verbal Pr...	4 Physical P...	5 Passive	6 Disruptive	7 Refused
Carl Brownfield	Willow (Demen...			✓					
Mary Chambers	Willow (Demen...						✓		
Tom Clouse	Evergreen (Re...					✓			
Anna Crawford	Maple (Long T...				✓				
Brenda Dean	Evergreen (Re...							✓	
Dale Dean	Maple (Long T...			✓					
Ruth Feldman	Maple (Long T...				✓				
Bill Fenton	Maple (Long T...						✓		
Janet Harrison	Maple (Long T...			✓					

Print Save Cancel

Once you have finished recording all of the residents’ participation levels, click “Save.” There is also a button to print this screen if you would like to have a paper copy. You can print a filled-out copy for your permanent files, or you can print a blank copy to use as a participation-recording Worksheet to take with you to the activity.

For information on other ways to record resident participation, please see the online Help system in ProActivity Reports. You can access it by clicking the Help icon in the main toolbar.

Recording Observations

The Activities Observations Tab allows you to record unscheduled, self-directed activities that you or your staff members have seen a resident involved in.

Note that "Recording Participation" is different from "Observations".

You record participation for *scheduled* activities -- that is, activities that you've put on your activity calendar. For more information on recording participation for scheduled activities, please see the "Recording Participation" section of this guide.

"Observations" are less structured, and are often self-directed activities that your residents engage in on their own. For example, if a CNA sees two residents playing cards in the library, that would be recorded as an Observation. Similarly, if a staff member notices a resident reading in the courtyard, that would also be an Observation, too. These activities are important to record because they give you a fuller picture of residents' involvement.

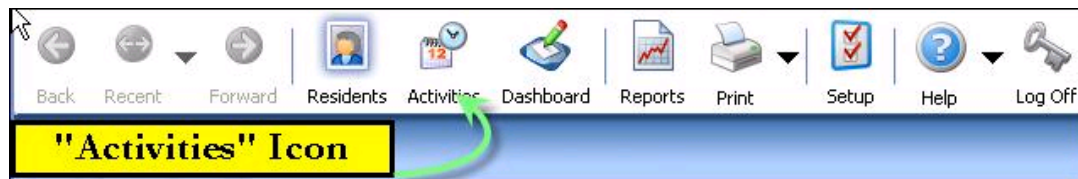
The government's new interpretive guidelines stress that resident activities are the responsibility of the whole facility, not just the Activity Department. To help meet this requirement, ProActivity Reports provides an Observation Worksheet that you can print out and distribute around your facility so that the whole staff can help record Observations of resident activity.

Before you can record observations, you must first decide which activities are observable and which are not. This helps keep the size of your observation worksheets manageable and makes it faster to record observations. To see how to make activities observable, please see the "Making Activities Observable" section of this guide.

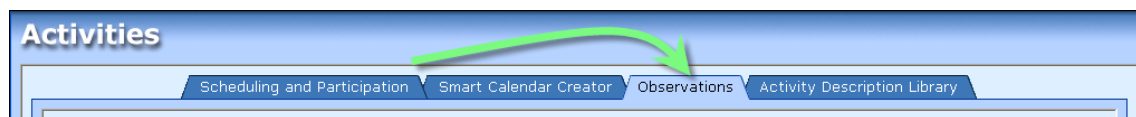
Observation Worksheet

To record observations,

Click on the “Activities” icon on the main toolbar at the top of the screen.



Then select the “Observations” tab.



Activities

Scheduling and Participation
Smart Calendar Creator

Show all current residents in all groups

Observation Date
9/15/06
Verdana
10
+
-

Sep 15, 2006

Name	Group	Total	Art (independent)	Devotions	Talking Books	TV for entertainment	TV for sports	Write creative	Write letters/cards	Yoga
James Sargent	Maple (Long...									
Lillie Wolf	Willow (Deme...									
Laura Miller	Maple (Long...									
Steve Santini	Evergreen (R...									
Brenda Dean	Evergreen (R...									
Judy Summers	Evergreen (R...									

The observations tab has two parts. It has a list of all your residents and what group they belong to along the left side. Across the top it shows all the activities you have marked as “observable.” To make an activity observable, please see the section entitled “Making Activities Observable.”





There are two filters at the top of this screen that you can use to show only residents in certain groups. Also at the top of the screen there is a drop down menu from which you can choose the date you want to record observations for.

For our example, we want to show all current residents in all groups, and the observation date is September 15, 2006. Once you have the filters and the date set for what you want, you can begin recording information.




To record observations, find the box that corresponds to the resident you want and the activity they were observed engaging in. Click the box, and then type in the number of times the resident was observed engaging in that activity that day.

For example, James Sargent was observed watching TV for sports on September 15, 2006.

Click the box that corresponds to both the resident and the activity that resident was observed doing.

Sep 15, 2006											
	Name	Group	Total	Art (independent)	Devotions	Talking Books	TV for entertainment	TV for sports	Write creative	Write letters/cards	Yoga
	James Sargent	Maple (Long...									
	Lillie Wolf	Willow (Deme...									
	Laura Miller	Maple (Long...									

Type in the number of times the resident was observed participating in that activity for the day.

Sep 15, 2006											
	Name	Group	Total	Art (independent)	Devotions	Talking Books	TV for entertainment	TV for sports	write creative	write letters/cards	Yoga
	James Sargent	Maple (Long...						1			
	Lillie Wolf	Willow (Deme...									
	Laura Miller	Maple (Long...									

Click “Save Changes.”

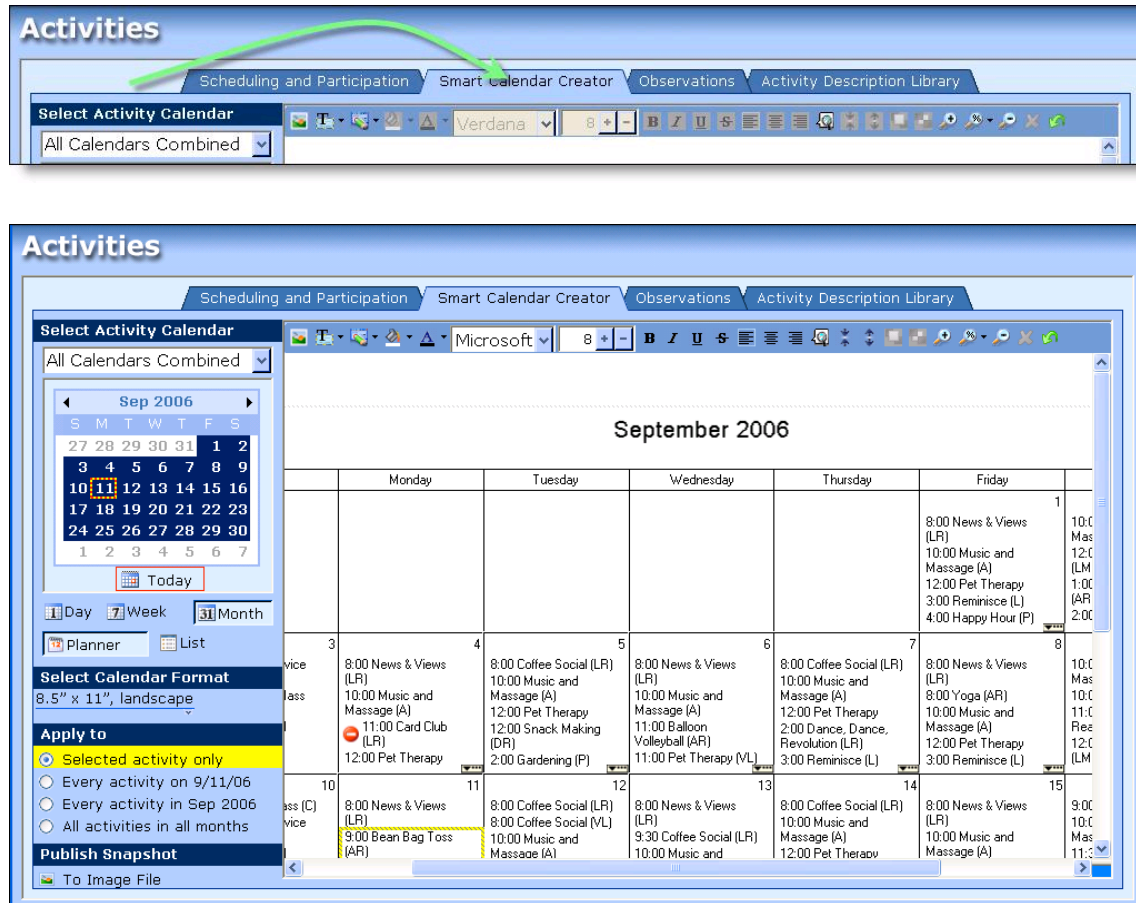
You have recorded an observation.

You can also print out a blank worksheet to hand out to your staff. To do so, select the day you want to print, and then click the “Print” icon in the main toolbar at the top of the screen.

Smart Calendar Creator

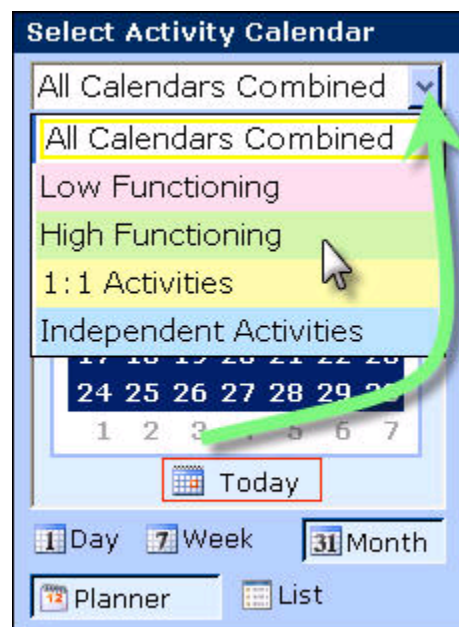
You can use the “Smart Calendar Creator” to create the calendars you post in your facility or hand out to your residents. The calendars you create in this screen will automatically update themselves whenever you change your activity plans or add a new activity.

Click the “Smart Calendar Creator” tab.



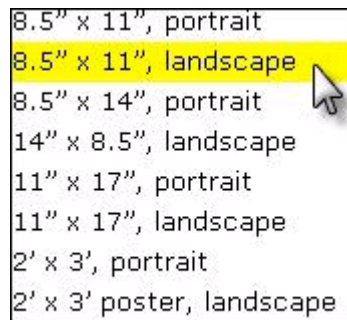
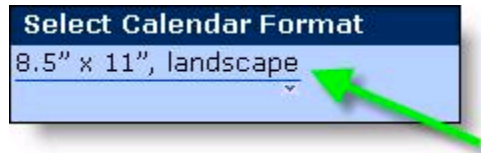
On the left side of the screen, there is a command area where you can select the calendar you want to work with, the date, the time frame (day, week, month), and the presentation format (Planner or List view).

Click on the “Select Activity Calendar” drop-down menu to select the calendar you want to edit or publish.



The names of the Calendars that appear in the drop-down menu are the names you created in the “Calendar Names” section of set-up. To create and name a new Calendar, please see the “Calendar Names” section.

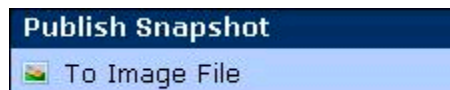
Below the calendar tools, you can select the size paper you want to print your calendars on. There are eight options available.



There are different layouts for each combination of the following: calendar, time frame, presentation format, and paper size.

If you do some editing for one combination, those changes won't appear in other calendars with different combinations. You can control each format combination individually.

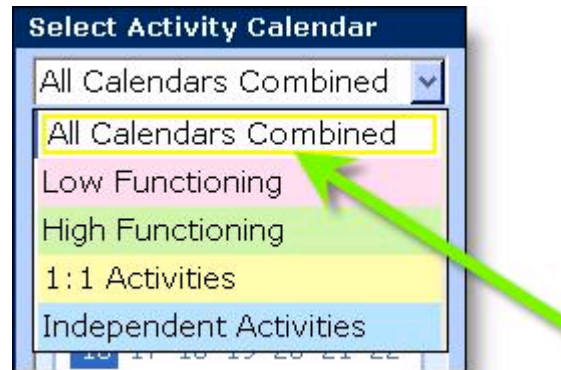
At the bottom of the left side is the option to save your calendar as an image file.



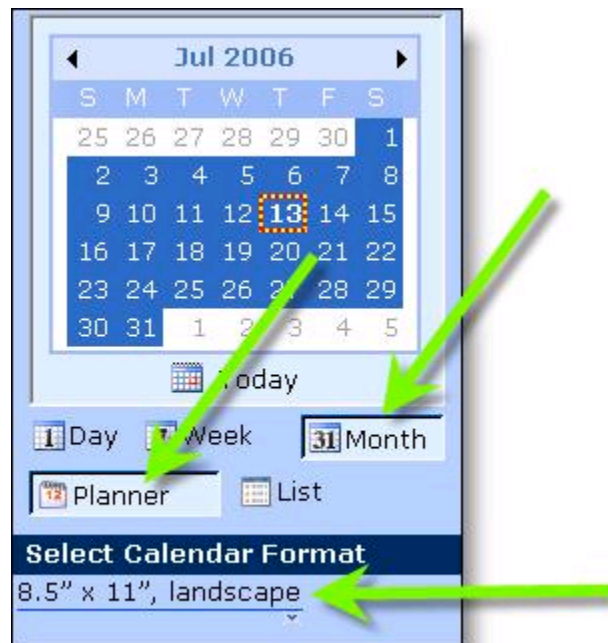
You can use the Image File that you create to email your calendar to residents' family members, include it in your newsletter, or post it on your in-house television system.

To edit Calendars in the “Smart Calendar Creator,” you’ll use the tools we just reviewed.

Select the calendar you want to work with by clicking the Calendar drop-down menu.

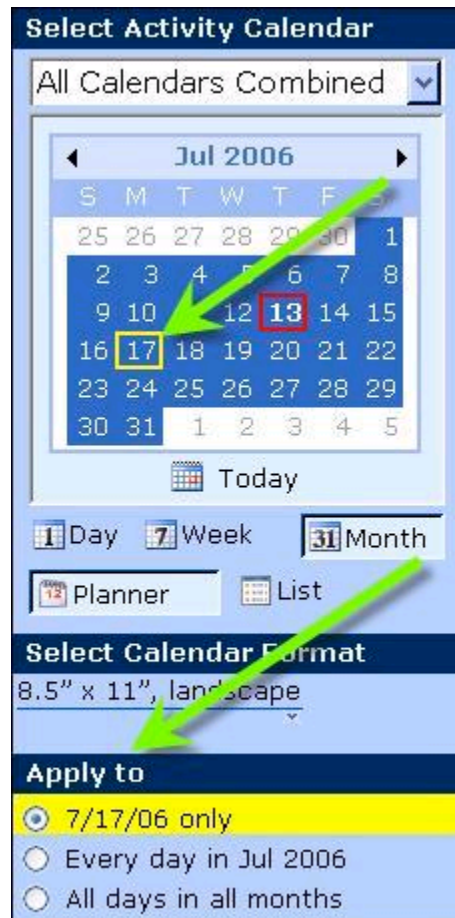


Select the Time Frame to “Month” and the presentation format to “Planner.” Select a paper size 8.5” x 11”, portrait. Change the date in the calendar at the top left so your activities are visible.

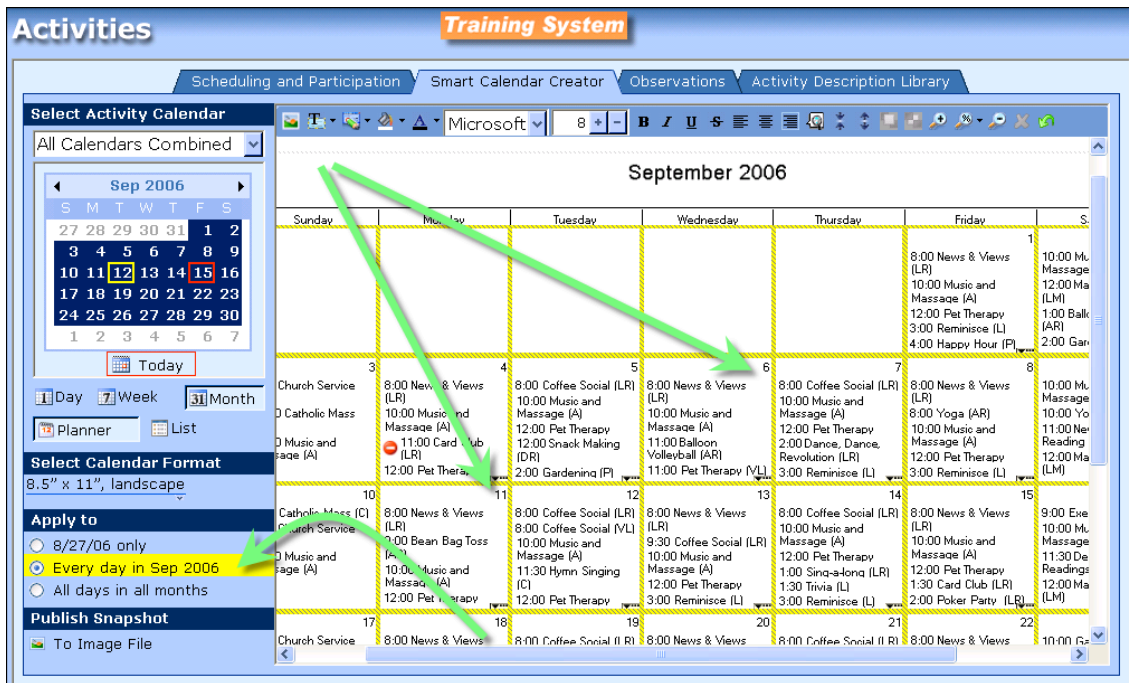


There are many ways to edit your smart calendars. You can format the activities on a single day, a whole month, or all days in all months.

To format the activities on a single day, click on the date in the View Calendar.

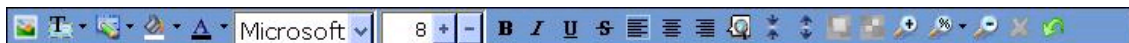


To edit every day in the month, click on the “Every day in Sep 2006” radio button.



To edit everyday in every month, click on the “All days in all months” radio button.

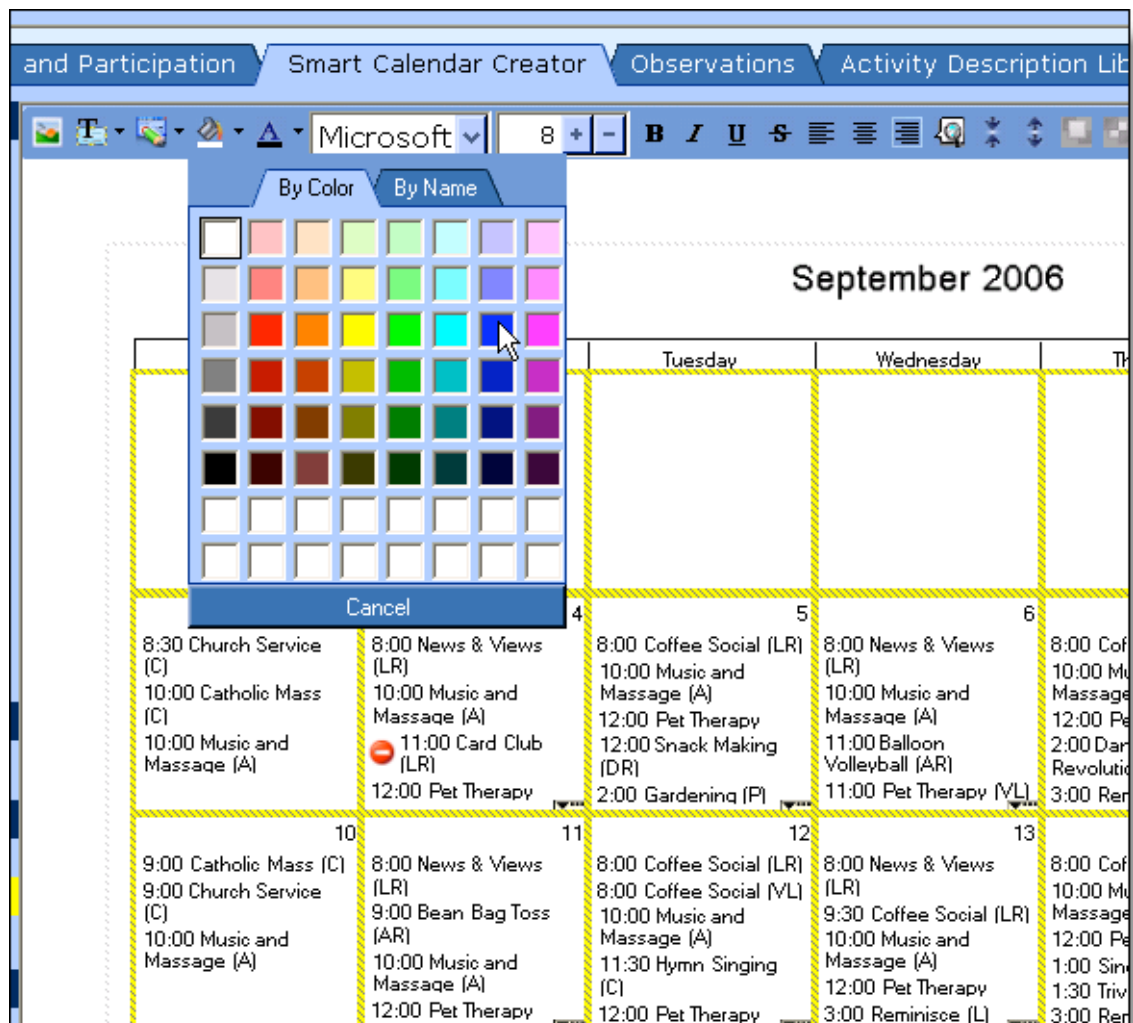
Once you have selected the time period you want to edit, you can use the toolbar to edit the color, font, and the overall style and appearance of your calendar.

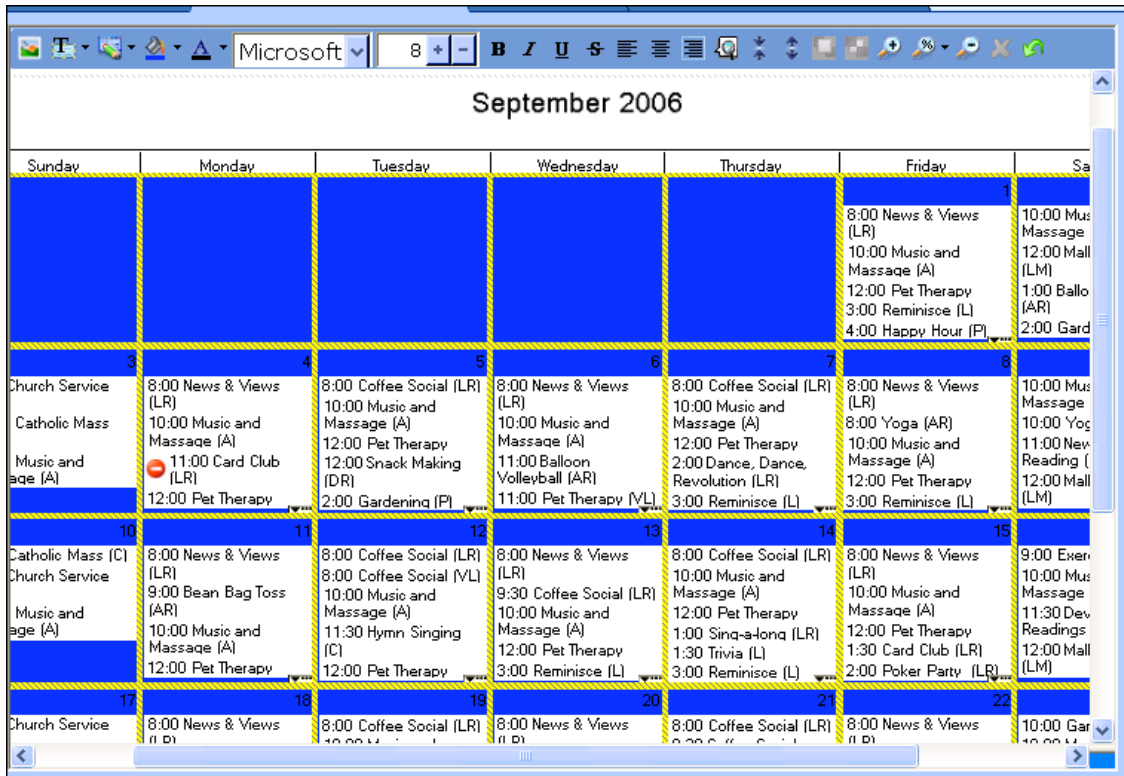


For example, you can make the background of your calendar blue.

Click on the “Every day in Sep 2006” radio button

Click on the Paint bucket icon to pull down a menu of colors. Click on the color of your choice.



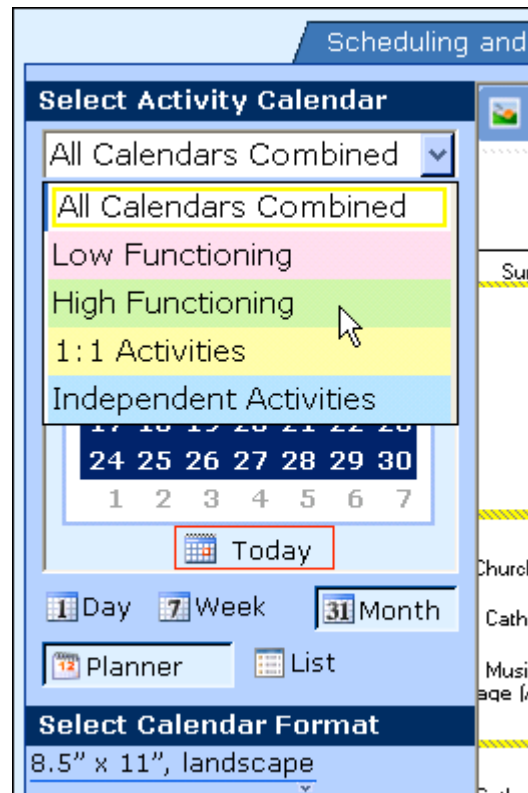


You'll notice that the areas surrounding the activities didn't change. That is because you can also edit activities individually.

To edit an activity, click on it.

As with editing the days, you can choose between editing the selected activity only, editing all the activities on that date, editing all activities in the month, or editing all activities in all months.

From the calendar drop-down menu, select the “High Functioning” calendar.



Click on an activity.

The screenshot shows the 'Smart Calendar Creator' window. On the left, there's a 'Select Activity Calendar' dropdown set to 'High Functioning'. Below it is a calendar for 'Sep 2006' with dates 1 through 31. A 'Today' button is at the bottom. Further down, 'Select Calendar Format' is set to '8.5" x 11", landscape'. Under 'Apply to', the 'Selected activity only' radio button is selected. At the bottom, there's a 'Publish Snapshot' section with a 'To Image File' button. The main area is a calendar grid for September 2006, showing activities for each day. A yellow callout box with the text 'Select an activity' points to the '5:00 Movies in the Library (L)' activity on Wednesday, September 13th.

Click on the "Every activity in Sep 2006" radio button.

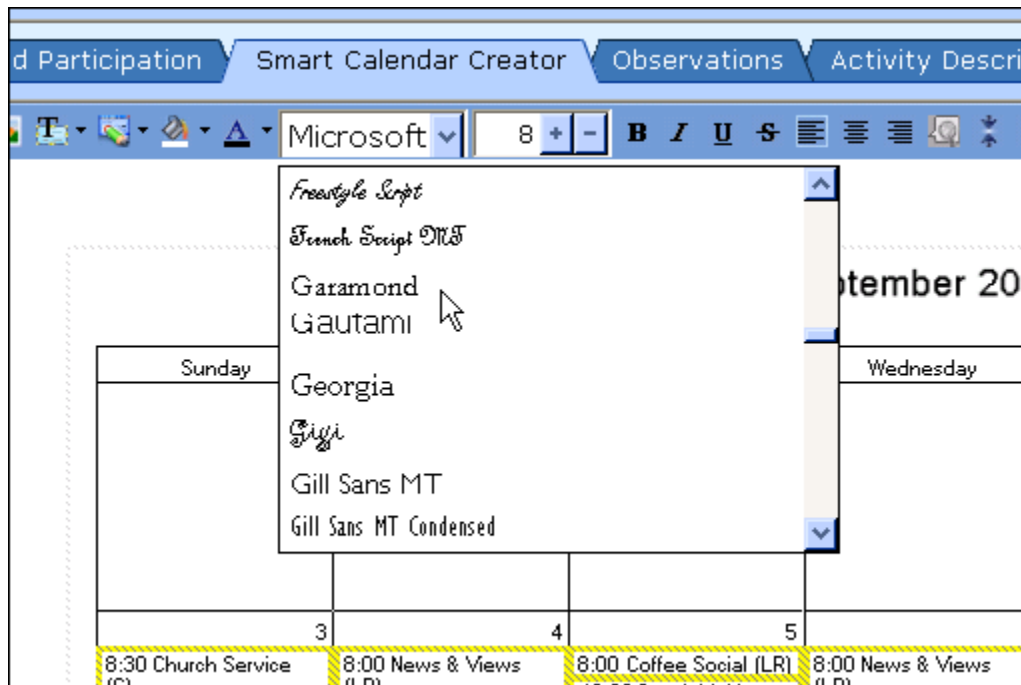
This screenshot is similar to the previous one, but the 'Every activity in Sep 2006' radio button under the 'Apply to' section is now selected. A yellow callout box with the text 'Every activity in Sep 2006' points to this radio button. Additionally, a green arrow points from the '5:00 Movies in the Library (L)' activity on Wednesday, September 13th, to the 'Every activity in Sep 2006' radio button, indicating the effect of this selection.

Clicking on the "Every activity in Sep 2006" radio button will highlight every activity in the month.

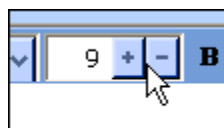


You can use this tool bar to change the appearance of the activities you have selected. For example, you can change the font style and size of all the activities in this month.

Click the font style drop-down arrow and choose the style you prefer.



Click the font size buttons (+/-) to choose the size you prefer.



September 2006						
day	Monday	Tuesday	Wednesday	Thursday	Friday	
					8:00 News & Views (LR) 4:00 Happy Hour (P) 7:00 Movies in the Library (L)	1
3	4	5	6	7	8	
Service (C)	8:00 News & Views (LR)	8:00 Coffee Social (LR)	8:00 News & Views (LR)	8:00 Coffee Social (LR)	8:00 News & Views (LR)	
ic Mass (C)	11:00 Card Club (LR) 4:00 Happy Hour (P)	12:00 Snack Making (DR) 4:00 Happy Hour (P)	11:00 Balloon Volleyball (AR) 4:00 Happy Hour (P)	2:00 Dance, Dance, Revolution (LR) 4:00 Happy Hour (P)	4:00 Happy Hour (P) 6:00 Ice Cream Social (P)	
10	11	12	13	14	15	
Mass (C)	8:00 News & Views (LR)	8:00 Coffee Social (LR)	8:00 News & Views (LR)	8:00 Coffee Social (LR)	8:00 News & Views (LR)	
Service (C)	2:00 Creative Hands (AR) 4:00 Happy Hour (P)	11:30 Hymn Singing (C) 4:00 Happy Hour (P)	9:30 Coffee Social (LR) 4:00 Happy Hour (P)	1:30 Trivia (L) 4:00 Happy Hour (P)	2:00 Poker Party (LR) 4:00 Happy Hour (P)	

You have changed the font of your activities.

Besides changing the font and the color of your calendar, you can add images and text boxes to personalize your calendar.

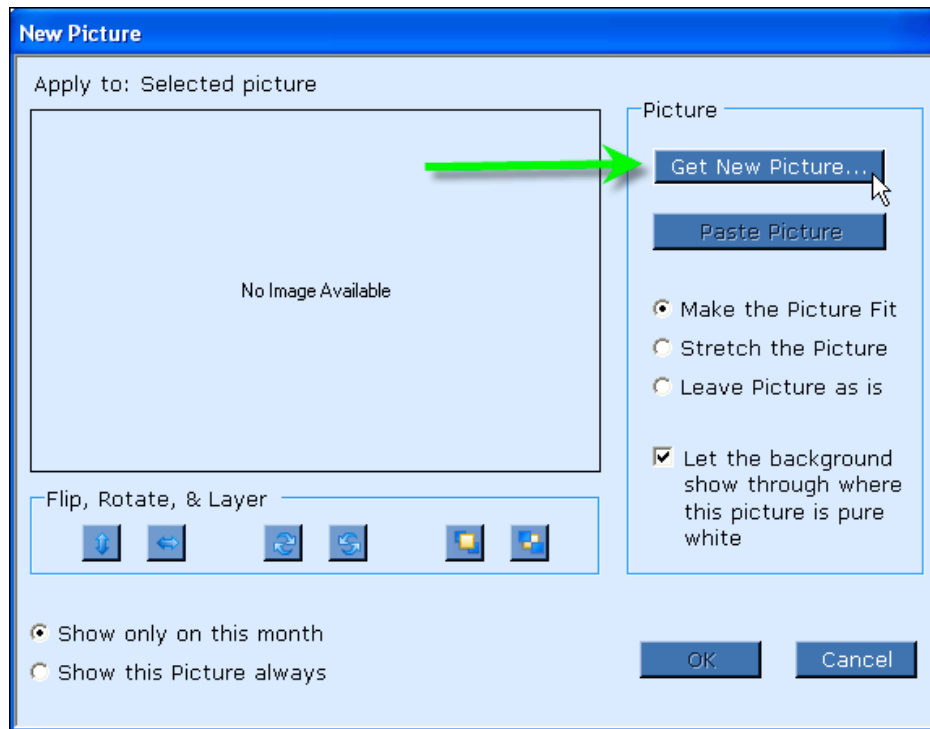
To add an image to your calendar, click the “Add Picture” command icon from the toolbar.

Click the “Add Picture” command icon.

The screenshot displays the 'Activities' training system interface. At the top, a navigation bar includes icons for Back, Recent, Forward, Residents, Activities, Dashboard, Reports, Print, Setup, Help, and Log Off. Below this, the 'Activities' section is titled, and a 'Training System' banner is visible. The main content area is divided into three tabs: 'Scheduling and Participation', 'Smart Calendar Creator', and 'Observations'. The 'Smart Calendar Creator' tab is active, showing a 'Select Activity Calendar' dropdown menu with 'Low Functioning' selected. Below this is a calendar for September 2006. A green arrow points from a yellow box labeled '"Add Picture" command icon' to the 'Add Picture' icon in the toolbar. The toolbar also includes icons for text formatting (bold, italic, underline, strikethrough) and a font color selector.

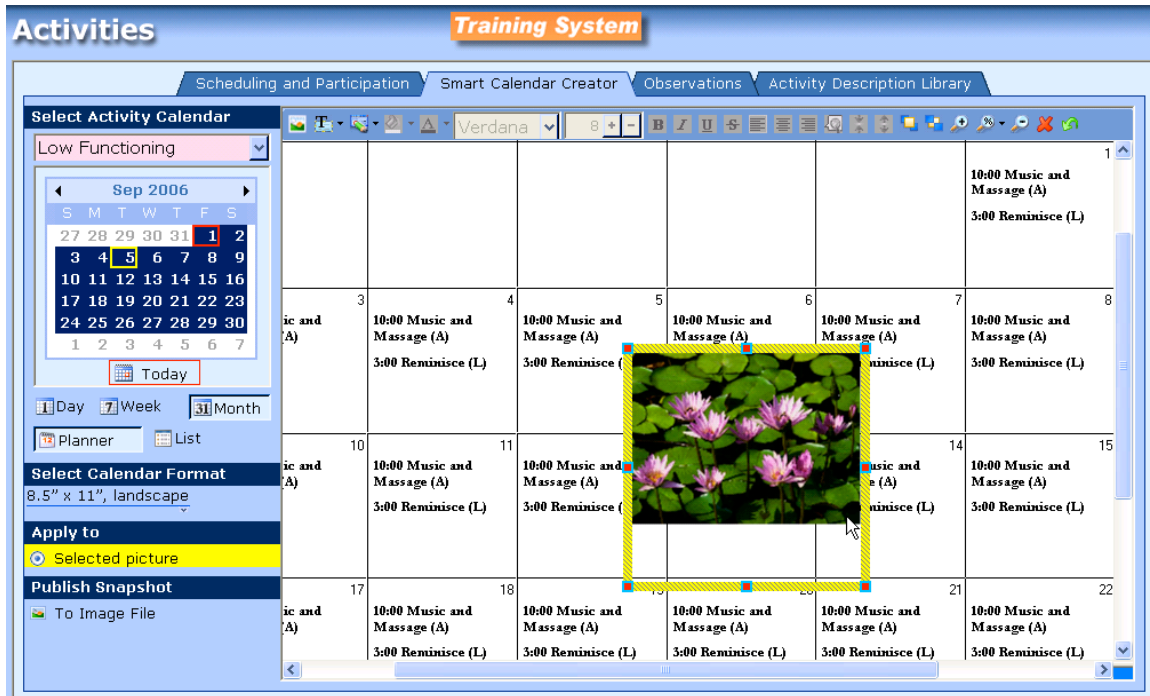
S	M	T	W	T	F	S
27	28	29	30	31	1	2
3	4	5	6	7	8	9
10	11	12	13	14	15	16
17	18	19	20	21	22	23
24	25	26	27	28	29	30

In the New Picture dialog box that appears, click the “Get New Picture...” button.



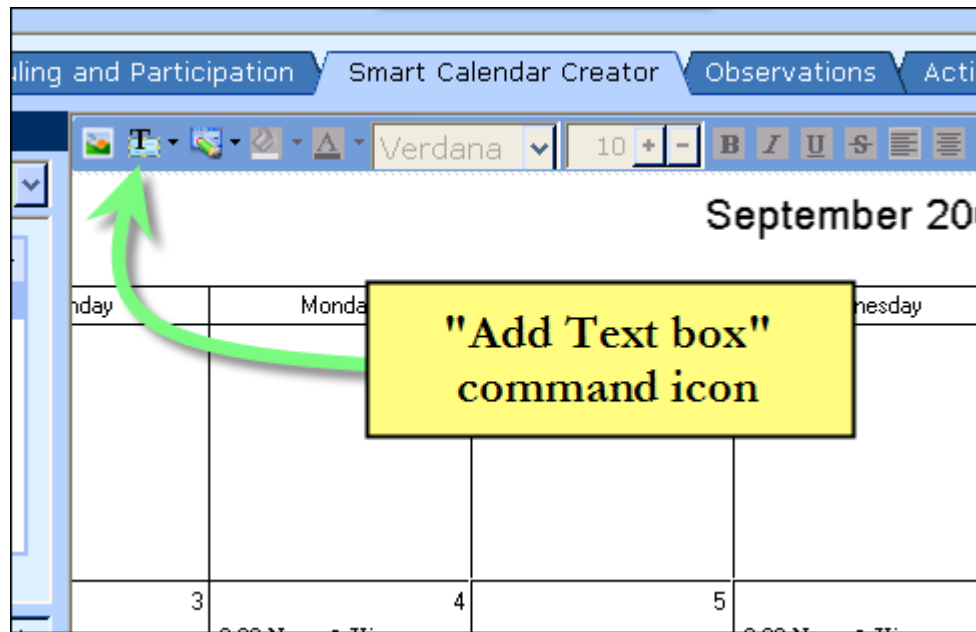
Navigate to your My Pictures folder and select the image you want to add to your calendar.

The picture is added to your calendar. You can drag it around and resize it.

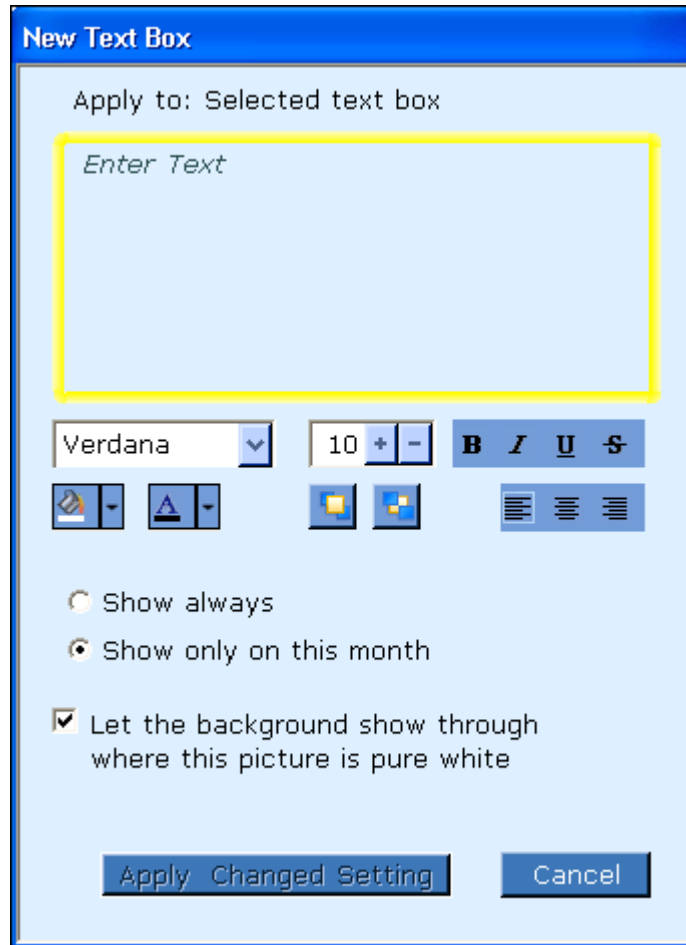




You can also add text boxes to your calendar.

Click on the “Add Text box” command icon from the toolbar.



A “New Text Box” dialog box appears. In this box you can enter your text, change font styles and sizes, and alter the background and font color. When you are finished, click “Apply Changed Setting.”




September 2006					
Day	Monday	Tuesday	Wednesday	Thursday	Friday
					1 8:00 News & Views (LR) 4:00 Happy Hour (P) 7:00 Movies in the Library (L)
3	4	5	6	7	8
Service (C) Public Mass (C)	8:00 News & Views (LR)  11:00 Card Club (LR) 4:00 Happy Hour (P)	8:00 Coffee Social (LR) 12:00 Snack Making (DR) 4:00 Happy Hour (P)	8:00 News & Views (LR) 11:00 Balloon Volleyball (AR) 4:00 Happy Hour (P)	8:00 Coffee Social (LR) 2:00 Dance, Dance, Revolution (LR) 4:00 Happy Hour (P)	8:00 News & Views (LR) 4:00 Happy Hour (P) 6:00 Ice Cream Social (P)
10	11	12	13	14	15
Public Mass (C) Service (C)	8:00 News & Views (LR) 2:00 Creative Hands (AR) 4:00 Happy Hour (P)	8:00 Coffee Social (LR) 11:30 Hymn Singing (C) 4:00 Happy Hour (P)	8:00 News & Views (LR) 9:30 Coffee Social (LR) 4:00 Happy Hour (P)	8:00 Coffee Social (LR) 1:30 Trivia (L) 4:00 Happy Hour (P)	8:00 News & Views (LR) 2:00 Poker Party (LR) 4:00 Happy Hour (P)

Your text box appears on the calendar and you can drag it around or resize it.

You can customize your calendars in many ways. You can make all of your different calendars (High Functioning, Low Functioning) have different styles. You can also change calendar formats. You can create and print out day planners, or make a large monthly calendar on 2 foot by 3 foot sized paper.

After you schedule activities in the “Scheduling and Participation” tab, they will appear on all your calendars, no matter how you format them. So you can create a monthly calendar, and then you can select a day and print out a day planner without having to reschedule all the activities.

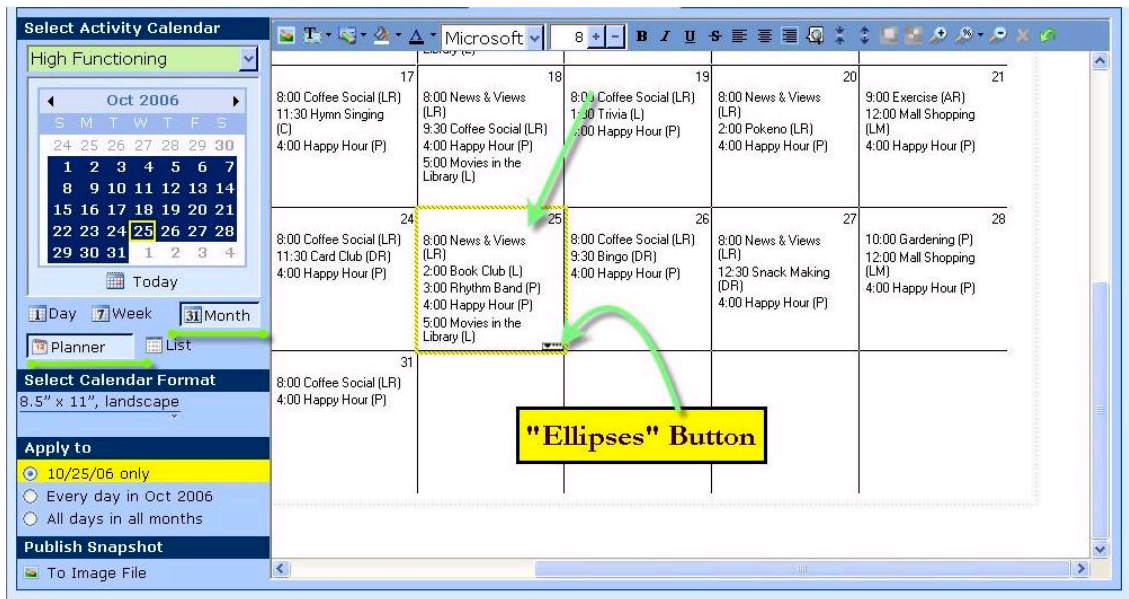
Here is an example of a customized calendar:

July 2006						
Sunday	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday
						
1:00 Church Outing 2:00 Rummikub 3:00 Communion 4:00 Church Service 5:00 Social Hour	1:00 Hymn Singing 2:00 Manicures 3:00 Bell Choir 4:00 Let's Get Physical 5:00 Phase 10	1:00 Organ Music 2:00 Shuffleboard 3:00 Ice Cream Social with Entertainment 4:00 Let's Get Physical 5:00 Old Time Radio	1:00 Sing-a-long 2:00 Sweet Shop 3:00 Bingo 4:00 Fun in the Sun 5:00 Clayton Baptist 6:00 Red Hat Society	1:00 Discussion Time 3:00 Table Games 4:00 Bible Study	1:00 News & Views 2:00 Resident Council 3:00 Country Music 4:00 Let's Get Physical 5:00 Rummaging & Remember	1:00 Bingo 2:00 Karaoke 1:00 Coffee Social 2:00 Bingo 3:00 Gospel Singing
1:00 Church Outing 2:00 Rummikub 3:00 Communion 4:00 Church Service 5:00 Social Hour	1:00 Hymn Singing 2:00 Manicures 4:00 Let's Get Physical 5:00 Phase 10	1:00 Chaplain Visit 2:00 Story Hour 3:00 Shuffleboard 4:00 Movie Time 5:00 Bible Trivia 6:00 Let's Get Physical 7:00 Old Time Radio	1:00 Sing-a-long 2:00 Sweet Shop 3:00 Bingo 4:00 Fun in the Sun	1:00 You be the Judge 2:00 Piano Music 3:00 Creative Hands 4:00 Table Games 5:00 Bible Study	1:00 News & Views 2:00 Basketball Game 3:00 Movies & Treats 4:00 Let's Get Physical 5:00 Rummaging & Remember	1:00 Coffee Social 2:00 Bingo 3:00 Gospel Singing
1:00 Church Outing 2:00 Rummikub 3:00 Communion 4:00 Church Service 5:00 Social Hour	1:00 Hymn Singing 2:00 Manicures 3:00 Bell Choir 4:00 Comedy Hour 5:00 Let's Get Physical 6:00 Phase 10	1:00 Vol. Chaplain 2:00 Story Hour 3:00 Shuffleboard 4:00 Dirty Poker 5:00 Let's Get Physical 6:00 Old Time Radio	1:00 Sing-a-long 2:00 Sweet Shop 3:00 Bingo 4:00 Getting to Know You Club 5:00 Bible Class	1:00 Discussion Time 2:00 Creative Hands 4:00 Music with Larry 5:00 Bible Study	1:00 Library Pals 2:00 Music with Gary 3:00 Movies & Treats 4:00 Let's Get Physical 5:00 Rummaging & Remember	1:00 Coffee Social 2:00 Bingo 3:00 Gospel Singing
1:00 Church Outing 2:00 Rummikub 3:00 Communion 4:00 Church Service 5:00 Social Hour	1:00 Hymn Singing 2:00 Manicures 3:00 Bell Choir 4:00 Let's Get Physical 5:00 Phase 10	1:00 Vol. Chaplain 2:00 Story Hour 3:00 Shuffleboard 4:00 Movie Time 5:00 4-4 Fair Tie 7:00 Let's Get Physical 8:00 PM Another Event	1:00 Sing-a-long 2:00 Sweet Shop 3:00 Bingo 4:00 Fun in the Sun	1:00 You be the Judge 2:00 Piano Music 3:00 Creative Hands 4:00 Table Games 5:00 Bible Study	1:00 News & Views 2:00 Birthday Party 3:00 Movies & Treats 4:00 Let's Get Physical 5:00 Rummaging & Remember	1:00 Coffee Social 2:00 Bingo 3:00 109th Birthday Party
1:00 Church Outing 2:00 Rummikub 3:00 Communion 4:00 Church Service 5:00 Social Hour	1:00 Hymn Singing 2:00 Manicures 3:00 Bell Choir 4:00 Let's Get Physical 5:00 Phase 10	Daily Events: 7:00-8:00 Breakfast 8:00 am MWF Prayer Meeting All Day, MWF Chaplain Visits 8:00 am Newspaper Delivery 9:45 Morning Coffee Hour 11:15-12:15 Lunch Afternoon Mail Delivery 5:00-6:00 Supper Mon, Wed, Fri, Sat Beauty/Barber Shop Tue, Wed, Thurs Care Plan Conference				

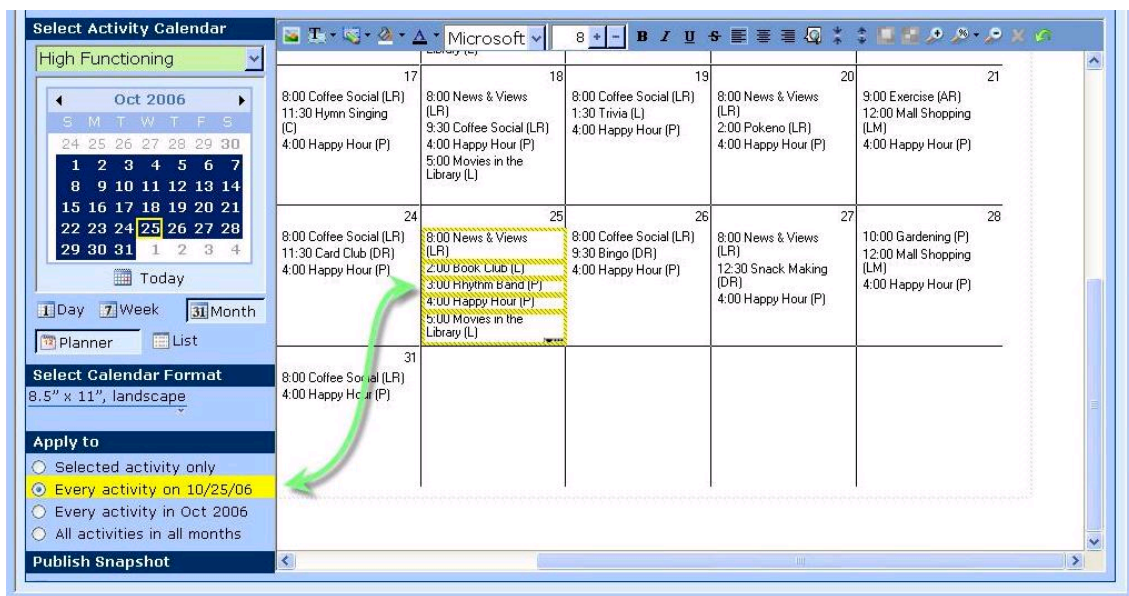
You may notice, as you edit your smart calendars, that not all activities will show up on a given date. There may be too many activities to fit on one date. An easy way to fix this is to decrease the size of the font for that day.


Select a day that doesn't show all of its scheduled activities.

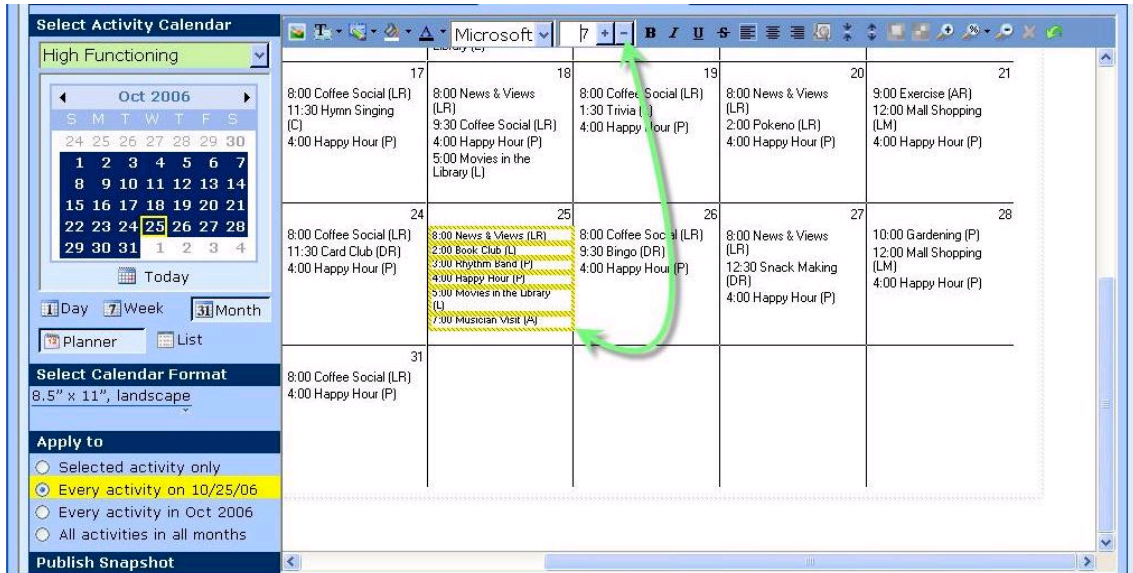
Days that have more scheduled activities than shown in the box will have an ellipsis button (...) near the bottom. When you click this button, you will see a list of hidden activities.



Select an activity on this date. Then select the “Every Activity on [date]” radio button in the left control panel.



On the Smart Calendar toolbar, use the  button to decrease the activity font size until all the activities show up in the date box.



For information on editing your calendars, please see the online help that is available in ProActivity Reports. You can get to it by clicking the Help icon in the main toolbar at the top of the screen.

There's also a special section on tips for making all of your activities fit on your calendar. It's in the "Smart Calendar Creator" section of the "Activities" area of the online help.

Backing Up Your Database

Your resident and activity information is stored in a database, and you should periodically make a safe copy of your data in case something goes wrong with your system. This safe copy is called a “backup”.

A backup is a save point, where all of your information is captured to a single file. If you have a catastrophe with the software or the computer, you can recover your information from a backup file by doing a “restore”.

Making frequent backups is very important. If something goes wrong with your computer (and it *does* happen), you will lose all of the work that you’ve put into it if you don’t have a safe backup.

Note that making frequent backups is only half the job. You must also make safe copies of your backups that are not on your local computer. For example, you can copy your backups onto compact discs (CD’s), and then store the CD’s in a safe location.

The importance of backups can’t be overstressed. If you’d like help on creating backups, please call the Mature Solutions Technical Support Group at (513) 871-0030.

Automatic Backups

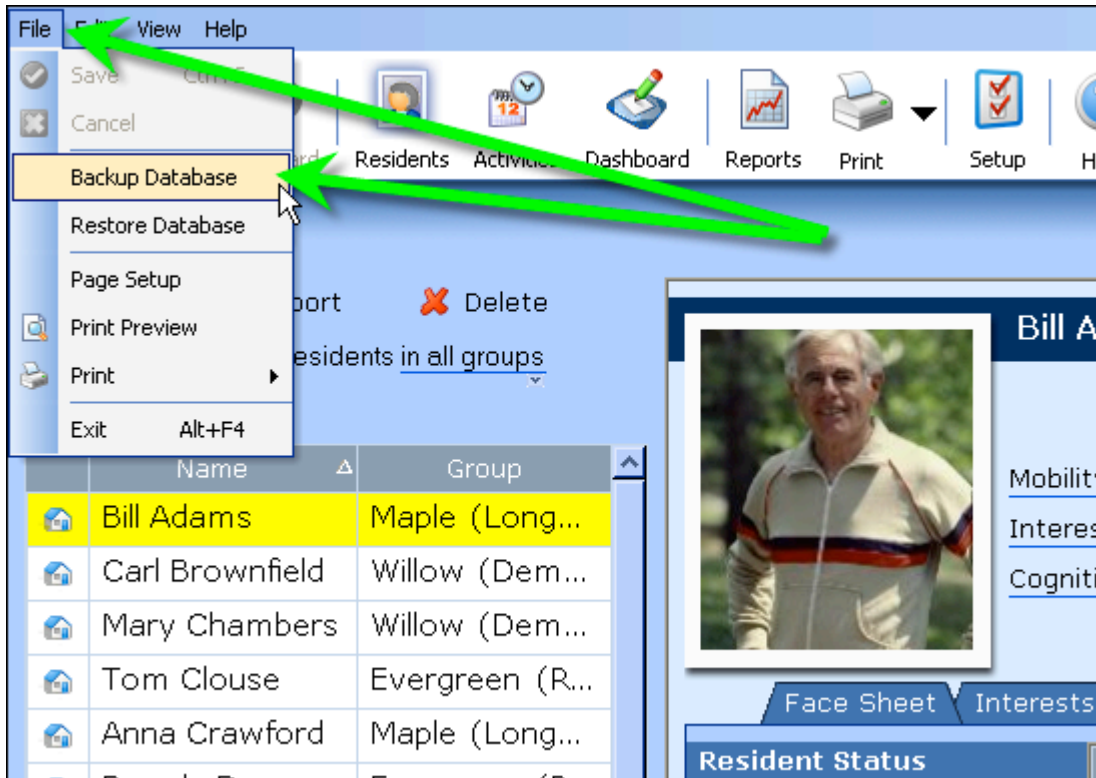
When ProActivity Reports is installed, the system automatically makes an initial backup. A backup program also runs continuously on the application server (the main computer where ProActivity Reports is running). It wakes up each morning at 2:10 AM and makes a backup of your data. **Please leave your computer running overnight so the nightly backup can be made.** If your computer is not running, no automatic backup will be made.

It’s actually better for your computer to leave it running continuously than to turn it off every night. It’s not the total hours that a computer is running that wears it out, it’s the “thermal cycling” – the repetitive heating up and cooling down that comes with frequently turning it on and off.

Periodically you may be reminded to do a backup, and you can click the “Backup” button in the reminder dialog to backup your information.

Manual Backups

If your computer is the application server, you can do a manual backup by choosing “Backup Database” from the “File” menu.



Backup Files

Backup files are saved in the “Backups” directory for the application, which for Windows XP is usually:

C:\Documents and Settings\All Users\Application Data\ProActivity Reports\Backups

For Windows 98 and Windows ME, the backup directory is usually:

C:\Windows\All Users\Application Data\ ProActivity Reports \Backups

Each backup file has the date and time that it was created as part of its name.

You should periodically copy the backup files to a safe network volume or write them to a CD-R.

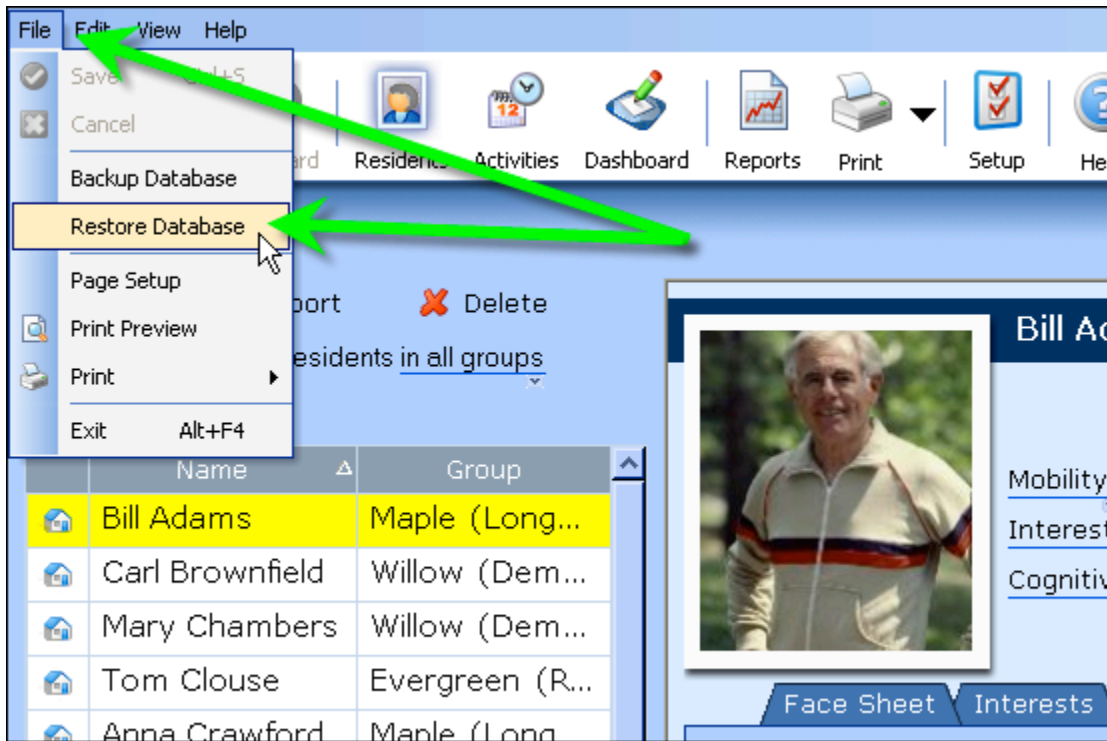
Backing up is extremely important. Sometimes computers develop problems even if you haven't done anything wrong. Having a safe copy of your backup files can be the difference between a minor inconvenience and a major catastrophe.

For detailed help on restoring your data from a backup file, please see the "Restoring Your Database" section of this Step-by-Step Guide.

Restoring Your Database

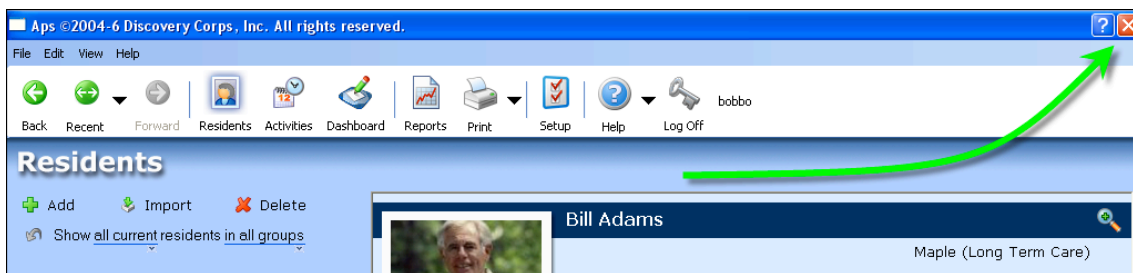
All of your resident and activity information can be restored from a backup file. For detailed help on creating a backup file, please see the “Backing Up Your Database” section of this Step-by-Step Guide.

If your computer is the application server, you can restore your database by choosing “Restore Database” from the “File” menu.



You can also run the Restore application directly from the Windows Start menu.

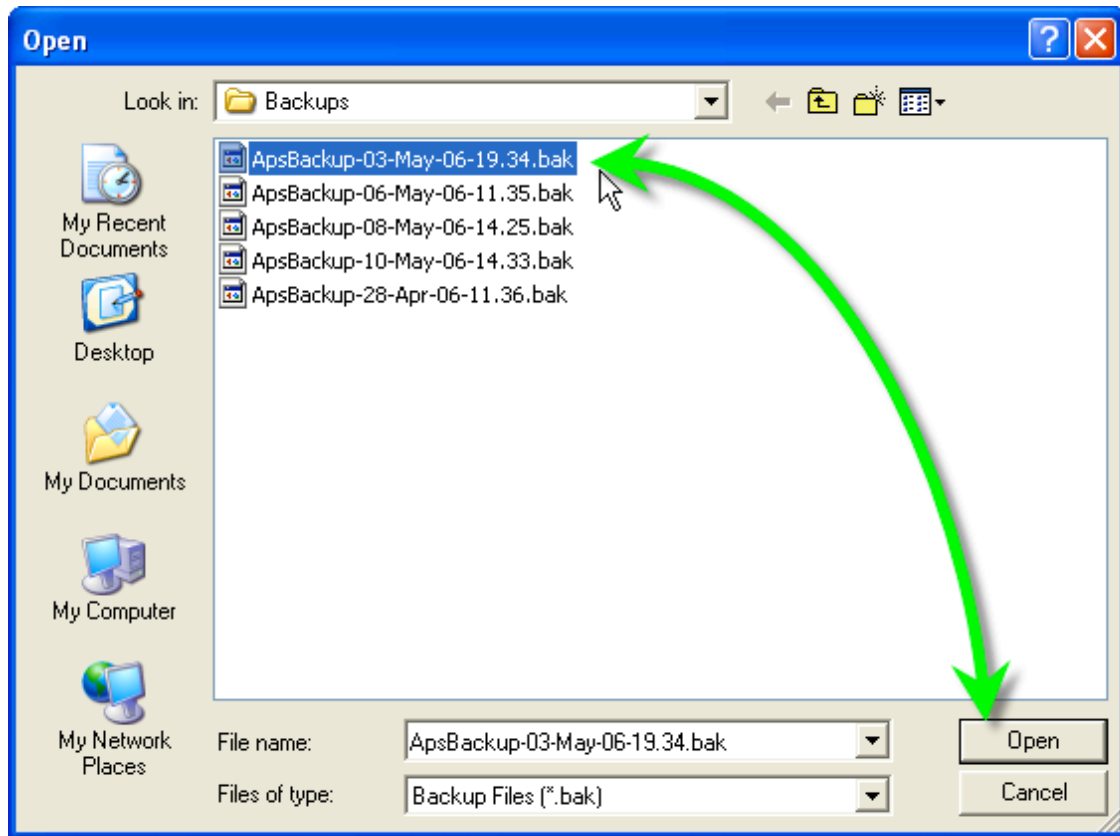
Before starting a restore operation, make sure that ProActivity Reports isn't running on any of the other computers on your network. Note: they can't just be logged out; all copies of the software must be quit. (You can quit ProActivity Reports by clicking the red and white "X" in the top right corner of the screen.)



The restore application will ask you to select a backup file, and it will restore your resident and activity information back to the point when the backup file was made. Any changes made after the backup was created will be lost – which is why it's so important to back up your database frequently.

Click the “Restore” button.

A file selection window will appear:



For detailed help on where your backup files are normally stored, please see the “Backing Up Your Database” section of this Step-by-Step Guide.

Notice that your backup file names include the date and time that they were made. You will usually want to select the most recent one.

Select the backup file to restore from and click “Open”.

Usually, if you're restoring your data from a backup file, it's because a major problem has occurred. We recognize that this can be traumatic. If you need any help restoring your database, please call Mature Solutions Technical Support Group at (513) 871-0030. We'll walk you through it.