Titanium Schedule

User Manual

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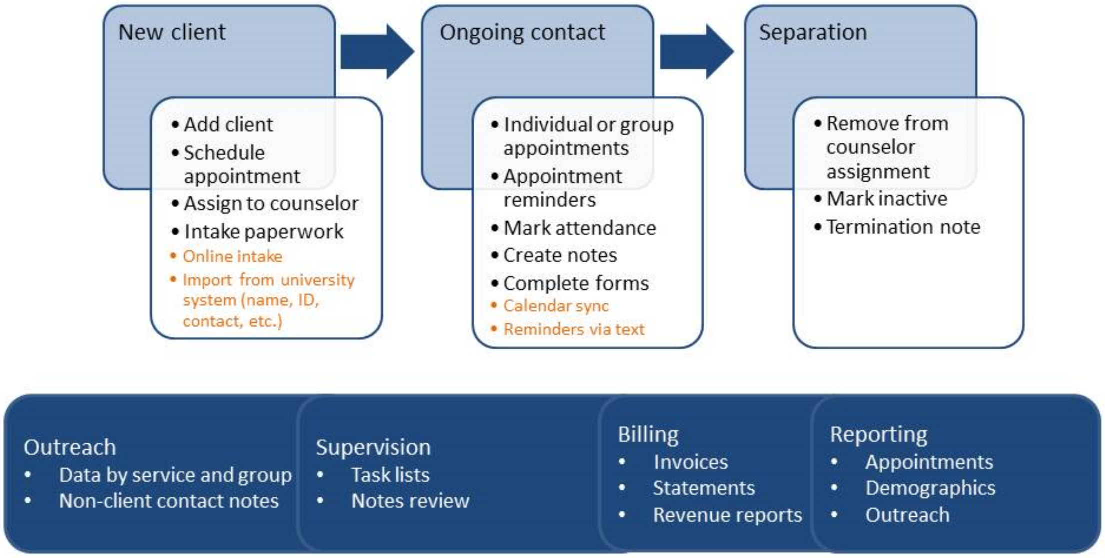
1 Overview

Titanium is an EMR software designed for counseling centers and other facilities that have a similar work flow like psychology department teaching clinics, disability centers, etc. The model below shows the basic client life cycle supported by center operations. The bulleted items are the key functions in Titanium (items in orange are optional features available for additional fees).


New client
• Add client
• Schedule appointment
• Assign to counselor
• Intake paperwork
• Online intake
• Import from university system (name, ID, contact, etc.)
Ongoing contact
• Individual or group appointments
• Appointment reminders
• Mark attendance
• Create notes
• Complete forms
• Calendar sync
• Reminders via text
Separation
• Remove from counselor assignment
• Mark inactive
• Termination note
Outreach
• Data by service and group
• Non-client contact notes
Supervision
• Task lists
• Notes review
Billing
• Invoices
• Statements
• Revenue reports
Reporting
• Appointments
• Demographics
• Outreach

Titanium is has a user friendly interface, with built-in tool tips that pop up when you mouse over items in the program. You can also access many command menus by right clicking on the schedule items and headers, and free text fields. Titanium allows users to copy and paste text in a variety of areas by highlighting the text and using keyboard commands (Ctrl+C to copy and Ctrl+V to paste).

The main sections of Titanium are:

- User Schedules
- Appointments and Placeholders for individuals or groups
- Reminders and attendance
- Clients (contact information, assign to users,demographics)
- Client File (appointment history and client notes)
- Client Notes and Group Session Notes
    - Diagnosis (e.g. DSM 5, ICD 10)
    - Medications (Note, electronic prescribing is also available.)
    - Data Forms (e.g.client demographic information, assessments, checklists, user defined questionnaires, etc.)

  - Attachments
  - Supervisor reviews
- Outreach activities/Non-client notes
- Billing
- Reports

In addition, Titanium contains productivity tools to help you with your daily work flow.

- User Configuration: Customizable settings for appearance (fonts, colors, schedule days, pop-up windows) and behaviors (appointment announcements, note and report defaults)

- My Clients: list of all your active clients which allows at-a-glance basic appointment statistics for each client and access to client files

- Task List: reminders to complete tasks assigned by your center administrator (e.g. mark attendance, create note, sign note, etc.)

- Waitlist: highly customizable feature allows creation of one or more waitlists

- Client Flags: set alerts for at-risk or special needs clients, which will appear in various screens in the program

- Client Appointment Reminders: send reminders via email or text message (additional fee for text messaging) to help reduce client no show rates. Message content is customized by your center administrator.

The following are add-on features to Titanium and have an extra fee.

- Web Component: allows clients to complete forms online, including intake forms, assessments, and surveys

- Client Import: allows clients to be added/edited by importing information from an external data source (i.e., school's student registration system). Can also be used to verify enrollment.

- Calendar Sync: Copies non-confidential appointment information from Titanium to Microsoft Exchange (Outlook) or Google calendar. This feature is commonly used to show "busy" times on external calendars, and to allow Titanium users to view their appointment schedules when they are out of the office.

Titanium has been customized for use by your center's administrator. System administrators should click here for assistance in configuring Titanium.

We encourage new users to view the complete suite of training videos available on our website at www.TitaniumSchedule.com. The *Getting Started with Titanium* video on our website contains a demonstration of commonly used features. Our website has contact information for the Titanium team, link to our Knowledge Base, and system/hardware requirements. For user questions, email is often the best contact method because you can include a screen shot and details. To discuss best practices, processes, and collaborate with other users, you can join the users Listserv. A link to the Listserv is available on our website. We encourage the system administrator at new facilities to sign up for the Listserv.

2 Billing

The Billing feature allows you to create track charges and payments for clients. Depending on settings chosen by your center administrator, users can create insurance claim forms, and export for upload to clearinghouses or print hard copy CMS 1500s. Titanium can be used to generate invoices, statements and client account reports.

If your center administrator chooses, the Invoices Needed list may be used to review appointments for which invoices should be prepared. You can document sliding scale billing agreements.

Billing is configured by your center administrator.

2.1 Add/Edit Charges

Users can add charges for clients by using invoices or adding service lines for insurance claims using the billing file screen. Centers that are not using Titanium to generate insurance claim forms should use invoices to enter charges. Centers that are generating claim forms using Titanium should enter charges from the billing file.

What would you like to do?

- Add charge to an invoice
- Edit charge on an invoice
- Add charge to bill insurance
- Edit insurance billing charge

Add Charge to an Invoice

1. Open the Invoice screen:

   - On the calendar screen, right click on the appointment and click Billing, or
   - On the clients tab of group appointments, click the desired client and click Billing, or
   - On the calendar screen, click to open an appointment and click the Billing icon on the menu bar, or
   - From the calendar screen, click Open > Invoices Needed, double click on a list item to open the appointment screen, and click the Billing icon on the menu bar or billing button on the clients tab for group appointments, or
   - From the calendar screen, click Open > Billing, and click Find to search for the client as you

normally would.

2. Add Invoice Items.

   - ○ Click Add to create a line item for the service.
   - ○ Choose a billing code from the pull down menu.
   - ○ If necessary, click in the date, description or amount fields to edit them.
   - ○ Repeat these steps to add additional invoice items. Click a line and click Remove to remove the line.

3. If necessary, use the pull down menus on the invoice screen to select other information to be added to the invoice. (Note: Your center administrator may not have enabled all of these items).

   - ○ Provider
   - ○ Supervisor
   - ○ Diagnosis (Note: Titanium will not automatically enter a diagnosis on the invoice screen from the client's file.)

4. Click the check box to set the selections as the default for invoices for the client.

5. Click Save.

6. Click Exit.

Edit Charge on an Invoice

Note: You may be unable to edit charges that have been used to generate insurance claim.

1. From the calendar screen, click Open > Billing.

2. Click the Find icon on the menu screen.

3. To see invoices from the current day, click Show Today's Invoices.

4. To see a client's invoices, click Select Client and search for the client. All invoices for the client are shown.

5. Double click to open the desired invoice.

6. Click Edit on the menu bar. (Note: To delete the invoice, click Delete on the menu bar. If the invoice charges have been used to create an insurance claim, you may be unable to edit the charges or delete the invoice.)

7. Make desired changes.

8. Click Save.

9. Click Exit.

Add Charge to Bill Insurance

These steps allow you to add charges from the Billing File screen, for the purpose of billing insurance. An invoice is created at the same time, and can be viewed/printed using the Print > Invoice option from the menu bar.

1. Navigate to the billing file screen by:

    - On the calendar screen, right click on the appointment and click Billing File, or
    - On the clients tab of group appointments, click the desired client and click Billing File, or
    - Search for the desired client, and click the Billing File icon on the menu bar, or
    - From the calendar screen, click Open > Billing File, and click Find to search for the client. (Note: You can work with multiple client accounts by clicking Find Clients, setting the filters and clicking Search. Click Ok to view the accounts of all clients who match the search criteria.)

2. Open the service lines window by clicking New, or clicking Selection Actions or right clicking in the account and choosing Post New Services. (Note: You may be prompted to associate the charge with an appointment, by selecting it from the list and clicking Ok.)

3. On the service line window, add charges by:

    - Use the pull down menus to choose counselor and supervisor, if not associated with an appointment.
    - Check the box to indicate that the entries on the screen will be the default for the client, if appropriate. (Note: If this box is marked, future service line entries will pre-populate with the information from this service line.)
    - Click Add, and use the pull down menus to choose service date, and billing code from the list created by your center administrator.
    - If necessary, click in the description or amount fields to edit them.
    - Check the box to indicate that the item will be billed to insurance.
    - Repeat these steps to add additional service lines. Click a service line and click Remove to remove the line.

4. Edit the default insurance items chosen by your center administrator as necessary (days/units,

emergency, HCPCS/CPT code, place of service, Early & Periodic Screening, Family Planning, Supplemental Information, Outside Lab).

5. Click Add to add diagnosis, then click the new diagnosis line to select the diagnosis. (Note: Titanium will not automatically add the diagnosis from the client's file.)

6. Click Save.

7. Click Exit.

Edit Insurance Billing Charge

Note: If a charge has been used to generate an insurance claim, it may not be possible to edit the service line.

1. Navigate to the billing file screen by:

   - On the calendar screen, right click on the appointment and click Billing File, or
   - Search for the desired client, and click the Billing File icon on the menu bar, or
   - From the calendar screen, click Open > Billing File, and click Find to search for the client. (Note: You can work with multiple client accounts by clicking Find Clients, setting the filters and clicking Search. Click Ok to view the accounts of all clients who match the search criteria.)

2. Click on the desired service line.

3. Open the service line window by clicking Select Actions or right clicking in the account and choosing View Service Lines.

4. On the service line window, click Edit on the menu bar. (Note: To delete the service line, select the service line item from the record of account, and click Delete on the menu bar.)

5. Use the pull down menus and buttons to make desired changes.

6. Click Save.

7. Click Exit.

2.2 Add/Edit Payments

What would you like to do?

- Add payment to the client account
- Add payment to an invoice
- Add insurance payment
- Edit payment on the client account
- Edit payment on an invoice
- Edit insurance payment
- Allocate account credit

Add Payment to the Client Account

These steps allow you to add payments from the Billing File screen. Payments will be reflected on the invoices to which the payment is allocated.

1. Navigate to the billing file screen by:

   - On the calendar screen, right click on the appointment and click Billing File, or
   - On the clients tab of group appointments, click the desired client and click Billing File, or
   - Search for the desired client, and click the Billing File icon on the menu bar, or
   - From the calendar screen, click Open > Billing File, and click Find to search for the client. (Note: You can work with multiple client accounts by clicking Find Clients, setting the filters and clicking Search. Click Ok to view the accounts of all clients who match the search criteria.)

2. Open the payment window by clicking Selection Actions or right clicking in the account and choosing Post Payment.

3. On the payment window, add payment by:

   - For centers that use Titanium to generate insurance claims, review the CoPay column(s) in the table. (Note: The co-pay amount is based on the entries made in the client's insurance information.)
   - Use the pull down menus to choose payment date and payment type. (Note: Click here for instructions to post an insurance payment for a claim created using Titanium. Use the insurance payment type in this window only to record payments for claims generated outside Titanium.)
   - Type in payment amount and description. (Note: If you right clicked on an existing service line to open the payment window, the payment amount will default to match the service line

amount.)

- Click in the Allocated Amount column, and type in the amount of the payment to be allocated to unpaid charges. (Note: Payments can be used to pay any unpaid charges showing in the window, in any combination. If you right clicked on an existing service line to open the payment window, the payment will default to that service line.)

4. Click Ok to save the payment. (Note: If the payment is not fully allocated to existing charges, a pop-up warning will be shown notifying the user that there is a credit. Click No to return to the payment window and allocate the entire payment. Click Yes if the client is pre-paying for services not yet rendered.)

5. To make an adjustment based on an explanation of benefits, right click on the line item and choose Adjust Item. Enter the amount and click Ok.

6. Click Exit.

Add Payment to an Invoice

These steps allow you to add payments on the invoice screen. The payments created on the invoice screen will be visible on the Client Billing File screen.

1. Open the Invoice screen:
    - On the calendar screen, right click on the appointment and click Billing, or
    - On the clients tab of group appointments, click the desired client and click Billing or
    - On the calendar screen, click to open an appointment and click the Billing icon on the menu bar, or
    - From the calendar screen, click Open > Billing, and click Find to search for the client. Select the desired invoice and click Ok. Click Edit on the menu bar.
2. Click Add in payments section.
3. On the payment window, add payment by:
    - Use the pull down menus to choose payment date and payment type. (Note: Click here for instructions to post an insurance payment for a claim created using Titanium. Use the insurance payment type in this window only to record payments for claims generated outside Titanium.)
    - Type in payment amount and description. (Note: The payment amount will default to the amount of the invoice charges.)
    - Click in the Allocated Amount column, and type in the amount of the payment to be allocated

to unpaid charges. (Note: Payments can be used to pay any unpaid charges showing in the window, in any combination. Titanium will default to showing payments in the charges for the current invoice.)

4. Click Ok to save the payment. (Note: If the payment is not fully allocated to existing charges, a pop-up warning will be shown notifying the user that there is a credit. Click No to return to the payment window and allocate the entire payment. Click Yes if the client is pre-paying for services not yet rendered.)

5. Click Save.

6. Click Exit.

Add Insurance Payment

1. Navigate to the billing file screen by:

   - On the calendar screen, right click on the appointment and click Billing File, or
   - On the clients tab of group appointments, click the desired client and click Billing File, or
   - Search for the desired client, and click the Billing File icon on the menu bar

2. Click the service line and click Selection Actions, or right click on a service line used to create the insurance claim and choose Post Primary Insurance Payment. (Note: The claim must be marked Complete before a payment can be posted. If payment is for the client's secondary insurance, choose Post Secondary Insurance Payment.)

3. Use the insurance company explanation of benefits to enter the amounts in payment and contractual adjustments for the service lines on the insurance claim.

4. Click Ok.

5. Click Exit.

Edit Payment on the Client Account

1. Navigate to the billing file screen by:

   - On the calendar screen, right click on the appointment and click Billing File, or
   - On the clients tab of group appointments, click the desired client and click Billing File or
   - Search for the desired client, and click the Billing File icon on the menu bar, or
   - From the calendar screen, click Open > Billing File, and click Find to search for the client.

(Note that you can work with multiple client accounts by clicking Find Clients, setting the filters and clicking Search. Click Ok to view the accounts of all clients who match the search criteria.)

2. Open the service lines window by clicking Selection Actions or right clicking in the account and choosing Edit Payment. (Note: To delete a payment, choose Delete Payment and click Ok.)

3. On the payments window, make desired changes and click Ok.

4. Click Exit.

Edit Payment on an Invoice

1. From the calendar screen, click Open > Billing.

2. Click the Find icon on the menu screen.

3. To see invoices from the current day, click Show Today's Invoices.

4. To see a client's invoices, click Select Client and search for the client. All invoices for the client are shown.

5. Double click to open the desired invoice.

6. Click Edit on the menu bar.

7. Click the payment and click View/Edit. (Note: To delete the payment, click Remove.)

8. Make desired changes on the edit payment window and click Ok.

9. Click Save.

10. Click Exit.

Edit Insurance Payment

1. Navigate to the billing file screen by:

   ○ On the calendar screen, right click on the appointment and click Billing File, or

   ○ On the clients tab of group appointments, click the desired client and click Billing File or

   ○ Search for the desired client, and click the Billing File icon on the menu bar, or

   ○ From the calendar screen, click Open > Billing File, and click Find to search for the client. (Note that you can work with multiple client accounts by clicking Find Clients, setting the filters and clicking Search. Click Ok to view the accounts of all clients who match the search criteria.)

2. Click the service line and click Selection Actions, or right click on a service line used to create the insurance claim and choose Edit Primary Insurance Payment. (Note: If payment is for the client's secondary insurance, choose Edit Secondary Insurance Payment. To delete payments, click Delete Insurance Payment.)

3. Use the insurance company explanation of benefits to edit the payment amounts and required contracted adjustments for the service lines on the insurance claim. (Note: If a secondary insurance claim has been generated, you may be unable to edit primary insurance payment.)

4. Click Ok.

5. Click Exit.

Allocate Account Credit

1. Navigate to a client invoice or client's billing file screen.

2. Click on the Unallocated Payments link (blue underline).

3. Click to select the payment to be allocated.

4. Click Allocate.

5. On the Edit Payment window, click in the Allocated Amount column and enter the desired amount.

6. Click Ok.

2.3 Find Invoices

1. From the calendar screen, click Open > Billing.

2. To see invoices from the current day, click Show Today's Invoices.

3. To see a client's invoices, click Select Client and search for the client. All invoices for the client are shown.

4. Double click to open the desired invoice. (Note: There is an Outstanding Accounts report available in the reporting feature of Titanium.)

2.4 Generate/Process Insurance Claims

Titanium allows users to print hard copy insurance claim forms, using pre-printed CMS 1500 paper. This feature is activated and configured by your center administrator. Prior to generating claims, users who bill insurance may also have to configure settings, depending on choices made by the center administrator.

Titanium does not electronically interface with any third-party insurance clearinghouses, but claim information can be exported into .pdf files on plain backgrounds which might be suitable for upload to some third-party processing websites.

What would you like to do?

- Add client insurance information
- Edit client insurance information
- Review client insurance information
- Generate bulk claims
- Generate claims for single client
- Process claims

Add Client Insurance Information

1. Navigate to the billing file screen or client record by:

   - From the calendar screen, click Open > Billing File, and click Find to search for the client, or
   - Search for the desired client

2. Click the Client Insurance icon on the menu bar or button on the client screen.

3. Click Edit.

4. Click Select to enter the insurance carrier:

   - Click the carrier from the list or (Note: Enter search criteria if the list is long.)
   - Click the Add New Carrier radio button and click Ok. Then enter insurance carrier information on the pop up window and click Ok.

5. Use the pull down menus and text boxes to enter the client's insurance information.

6. Enter a prior authorization number and number of visits, if applicable. (Note: Titanium will not perform any automatic calculations using this information.)

7. Enter the client's co-pay type (flat rate or percentage) and rate or percent. (Note: Titanium will not use this information to automatically calculate the client's co-payments.)

8. Click the Other Insurance Details tab, and use the pull down menus and text boxes to enter information required on insurance claims. (Note: You should consult with your center administrator or use the state or federal guidelines for CMS 1500 claim forms to learn more about these fields.)

9. If the client has secondary insurance, click the Secondary Insurance tab and enter information.

10. If desired, attach a scanned copy of the client's insurance card by clicking Insurance Cards, and using the Windows interface to navigate to the desired file. Enter the file name, and click Ok. (Note: To manage insurance cards, right click on the card and choose Delete, Edit Description, Open or Print.)

11. Click Save.

12. Click Exit.

Edit Client Insurance Information

1. Navigate to the billing file or client record screen by:

   - From the calendar screen, click Open > Billing File, and click Find to search for the client. (Note that you can work with multiple client accounts by clicking Find Clients, setting the filters and clicking Search. Click Ok to view the accounts of all clients who match the search criteria.) or
   - Search for the desired client

2. Click the Client Insurance icon on the menu bar or button on the screen.

3. Click Edit.

4. Click the desired tab, and edit the information. (Note: Click Clear All on the menu bar to remove all client insurance information. To clear information for a single tab, delete the carrier. If the secondary coverage has become primary, click Swap on the menu bar to switch the order in which claims will be submitted.)

5. Click Save.

6. Click Exit.

Review Client Insurance Information

- On the invoice screen, click Insurance CoPays to review client insurance information.
- On the Billing File screen, click Client Insurance to review insurance information.

Generate Bulk Claims

1. From the schedule screen, click Open > Insurance Claims Needed.
2. If desired, used the date filters to search for desired claims (e.g., last month).
3. Click on the Claim Issues tab to resolve problems with claims:
   - Click the Issue/Resolution column.
   - For each item, click Fix Issue.
   - If Titanium redirects to a screen, click Edit on the menu bar, make changes, and click Save and Exit.
   - For issues in system configuration, user configuration or client insurance information, review the pop-up message to determine the issue. Then exit the billing file, and navigate to the correct screen in Titanium to fix the problem.
4. When the Pending Claim Issues tab is blank, click the Ready for Generation tab. Click the check box next to the desired claims from the list or the Select All icon on the menu bar.
5. To preview claims, click the Preview icon on the menu bar.
6. To generate claims, click the pull down arrow next to the Generate Claims icon on the menu bar and choose whether to export or print claims
   - To print claims
     - Insert CMS 1500 printer paper.
     - Click Ok.
     - Click Exit.
   - To export a print image file, use the Windows interface to save the file to your computer. (Note: You can upload the print image file to the clearinghouse of your choice that accepts this file type. There is no automatic e-filing available in Titanium.)

Generate Claims for One Client

1. Navigate to the billing file screen by:

   - ○ From the calendar screen, click Open > Billing File, and click Find to search for the client. (Note that you can work with multiple client accounts by clicking Find Clients, setting the filters and clicking Search. Click Ok to view the accounts of all clients who match the search criteria.) or

   - ○ Search for the desired client, and click the Billing File icon on the menu bar

2. Click on the Pending Claim Issues tab to resolve problems with claims:

   - ○ Click the Issue/Resolution column.

   - ○ For each item, click Fix Issue.

   - ○ If Titanium redirects to a screen, click Edit on the menu bar, make changes, and click Save and Exit.

   - ○ For issues in system configuration, user configuration or client insurance information, review the pop-up message to determine the issue. Then exit the billing file, and navigate to the correct screen in Titanium to fix the problem.

3 When the Pending Claim Issues tab is blank, click the Claims Pending Generation tab. Click the desired claims from the list.

4. To preview claims, click the Preview icon on the menu bar.

5. To generate claims, click the pull down arrow next to the Generate Claims icon on the menu bar and choose whether to export or print claims

   - ○ To print claims

     - ▪ Insert CMS 1500 printer paper.

     - ▪ Click Ok.

     - ▪ Click Exit.

   - ○ To export a print image file, use the Windows interface to save the file to your computer. (Note: You can upload the print image file to the clearinghouse of your choice that accepts this file type. There is no automatic e-filing available in Titanium.)

Process Claims

Titanium contains claim actions that you can use to track their status. On the Record of Account tab, each service line used to generate a claim will show the claim action or amount paid by insurance after the claim is marked complete. On the Insurance Claims tab, each insurance claim shows the status, as well as subsequent related claims (e.g. resubmit, cancel/void).

Claim actions mirror the claim life cycle and include:

Action	Reason	Next Step
Pending	Service lines marked insurance billable have been entered	Generate and print
Submitted	Generated and printed from Titanium	Use explanation of benefits to determine next steps
Complete	Explanation of benefits has been received from insurance, and claim won’t be resubmitted	Add insurance payment and/or adjustments
Cancel/Void	Claim was sent to insurance in error. This status generates a new CMS-1500 claim form with cancel/void code in box 22.	Make changes to claim items and information, and generate new claim
Reject/Deny	Claim was rejected or denied by insurance.	If desired, mark claim resubmit and make desired changes to claim items and information.
Resubmit	If reject/deny was due to an error that can be corrected, this action will create a new claim to be submitted.	Use explanation of benefits to determine next steps
Delete	If the claim was created in error, click Delete to remove it from Titanium and enter the reason.	Generate and print new claims, if desired

The current claim action will be displayed next to the claim, and on the Record of Account under the insurance column(s) for each service line item included in the claim. To change a claim action:

1. Navigate to the billing file screen by:

    - From the calendar screen, click Open > Billing File, and click Find to search for the client. (Note that you can work with multiple client accounts by clicking Find Clients, setting the filters and clicking Search. Click Ok to view the accounts of all clients who match the search criteria.) or

- Search for the desired client, and click the Billing File icon on the menu bar

2. Click the Insurance Claims tab.

3. Right click on the insurance claim, and choose the desired claim action. If required, enter a reason for the action and click Ok. (Note: If the claim action does not follow the claim life cycle, you will see an information window explaining the next step. Click Ok to close the window.)

4. To undo a claim, action, right click on the claim and click Undo. The claim will be returned to its former state. If required, enter a reason for the action.

2.5 Process Sliding Scale Billing

Your center may choose to bill clients on a sliding scale based on income or other factors. Titanium allows center administrators to configure a tab on the client screen (bottom of the Contact Information tab) for users to enter billing comments. Those comments will be visible at the bottom of the invoice screen. To process sliding scale billing:

1. Create an invoice charge or service line.

2. Review Client Billing Note box at the bottom of the invoice screen or service line item screen.

3. Manually calculate the adjustment required based on the Client Billing Note.

4. If necessary, click in the amount field to edit the charge as instructed in the billing comments.

5. Complete the invoice or service line as you normally would.

2.6 Write Offs and Adjustments

Your center may choose to bill clients on a sliding scale based on income or other factors. Titanium allows center administrators to configure a tab on the client screen (bottom of the Contact Information tab) for users to enter billing comments. Those comments will be visible at the bottom of the invoice screen. To process sliding scale billing:

1. Create an invoice charge or service line.
2. Review Client Billing Note box at the bottom of the invoice screen or service line item screen.
3. Manually calculate the adjustment required based on the Client Billing Note.
4. If necessary, click in the amount field to edit the charge as instructed in the billing comments.
5. Complete the invoice or service line as you normally would.

2.7 Print Account Records

Titanium allows users to print invoices, statements or account transactions shown in the billing file, for single clients or in bulk. Some invoice and statement information is configured by the center administrator.

What would you like to do?

- Print client invoice/statement/account transactions
- Print bulk invoices
- Print bulk statements
- Print bulk account transactions

Print Client Invoice/Statement/Account Transactions

This process uses the billing file screen. Invoices and statements can also be printed from the invoice screen, by using the icons on the menu bar.

1. Navigate to the billing file screen by:

   - From the calendar screen, click Open > Billing File, and click Find to search for the client. (Note: You can work with multiple client accounts by clicking Find Clients, setting the filters and clicking Search. Click Ok to view the accounts of all clients who match the search criteria.) or

   - Search for the desired client, and click the Billing File icon on the menu bar.

2. Use the filters to limit the transactions shown by date, status or insurance claim. Use the collapse/expand all controls in the upper left corner to hide or show transactions.

3. Click the Print icon on the menu bar and choose invoice, statement or view.

- o The invoice printed will include transaction selected on the Record of Account tab.
- o Use the filters on the statement window to select the desired time frame, and click Print.
- o Use the printer icon on the View pop -up window to print the transactions.

Print Bulk Invoices

1. From the schedule screen, click the Reports icon.
2. Click Print Invoices.
3. Use the filter to set the desired invoice create date range.
4. Click Print. (Note: Click Preview and use the Export options to save the file to your computer.)

Print Bulk Statements

1. From the schedule screen, click the Reports icon.
2. Click Print Statements.
3. Use the filter to set the desired transaction date range.
4. Click Print. (Note: Click Preview and use the Export options to save the file to your computer.)

Print Bulk Account Transactions

1. From the schedule screen, click the Reports icon.
2. Click Billing File report.
3. Use the filters to select the desired content (transactions, transaction detail, list of invoices, list of insurance claims) and date.
4. Click Select to search for clients. Set filters and click Search. Click Ok to use the clients in the report.
5. Click Print. (Note: Click Preview and use the Export options to save the file to your computer.)

3 Client Import

This feature will import some client data from an external data source, like a university registration system. It can be used to update existing clients or add new clients. The data imported is chosen by your center administrator, and may include the information on the Contact Information tab on the client screen, and a data form. There is an additional fee for this feature.

This feature is configured by your center administrator.

Update an Existing Client

1. Search for the client.

2. Click the Edit icon on the menu bar.

3. Click the Client Import icon on the menu bar.

4. Click OK on the warning message and to update the client's information.

5. Click OK to confirm that the client has been updated.

6. Click Save.

7. Click Exit.

Adding a New Client

1. From the calendar screen, click Open > Client.

2. Enter the unique identifying information required for the client import (most likely the student ID number).

3. Hit the tab key. If a match is found in the external system, a green information message will appear at the top of the search screen.

4. Click New Client.

5. Click Yes to add the client using the imported data. The client screen for the new client opens.

6. Complete your center's process for adding new clients. (Note: It is likely that the client's information and form are not complete, and remaining data must be entered manually.)

4 Clients

Client information can be found on the client screen or in the client file. Depending on your user permissions, you may be unable to view files for clients who have not been assigned to you.

The client screen includes:

- Contact Information tab: Full name, date of birth, Student ID number, contact methods. Depending on how your center administrator configured the system, you may also see preferred name, preferred pronoun and pull down menus for whether it is okay to contact the client using those methods and tabs with free text fields (i.e., comments, billing comments, etc.).

- Medical Information tab: Depending on how your center administrator configured the system, you may see the medical information tab which contains client pharmacies and allergies.

- Disability tab: If your center administrator chooses, disabilities and accommodations are added and removed on this tab. Non-confidential comments about the items can also be added to this tab.

- Client Security Tab: Security access level for the client and users assigned to the client.

- Client Flags Tab: Your center administrator may choose to use flags to communicate information at a glance. Flags are assigned, deactivated and removed on this tab. Flag colors, descriptions, and behaviors are set by your center administrator. The Flags button appears on the menu bar of several screens in Titanium (e.g., appointment, client file, client screen). If a flag has been assigned for a client, the Flags button will be colored and a small flag icon will appear throughout the program when the client's name is shown (e.g., My Clients list, appointment screen/blocks, on search lists, etc.).

- Menu Bar Icons

  ○ Med Log: If your center administrator may chooses to use the feature, click to access compiled information from medication notes in the client's file.

  ○ eRx: If your center has purchased electronic prescribing, users with sufficient permission can click this icon to open the electronic prescribing portal.

  ○ Client file: The client file contains appointment history and notes. Double click any item in the client file to open it.

    Entries for client allergies, medications, and disabilities are shown at the top of the client file. Calendar icons in the client file represent appointments. Yellow notebook icons represent notes. Items that are contained within others are indented and connected with a dotted line. For instance, diagnoses, medications, data forms and attachments will always appear indented under notes because they are part of the note. Notes may be indented under appointments if they are associated with the appointment.

  ○ Billing File: The client billing file contains all charges and payments. If your center is using

Titanium to generate insurance claims, claim activity is also shown.

- Waitlist: If your center administrator chooses to use the feature, click to add entries for client on center waitlist(s)
- Demographics: Data form containing information about client background/characteristics attached to a note in the client's file.
- Shortcuts: Drop down menu with shortcuts to one or more data forms chosen by your center administrator.

4.1 Add/Edit/Delete Client

What would you like to do?

- Add a client
- Edit a client
- Terminate client assignment
- Deactivate client
- Delete a client

Add a Client

1. Navigate to the Find/Add client screen by:
   - Right click on the schedule to add an individual appointment.
   - From the calendar screen, click Open > Clients
2. Enter the Student ID and press the tab key, or enter the full or partial last name and click Find.
3. If the client is not found, enter the last and first name, and click New Client.
4. Click Yes to confirm.
5. The client screen opens in a new window. Enter information required by your center. (Note: If you are entering a client to make an appointment, you will most likely enter a contact method and set that method as "Ok to Contact", and then edit the client after intake. You may see a prompt to add yourself as a user on the client security tab.
6. Click Save.

7. Click Exit.

Edit a Client

1. Navigate to client screen from:

   - Any screen that has Client icon on the menu bar (e.g., appointment screen, My Clients list)
   - From the calendar screen, click Open > Clients and search for the client

2. Click Edit on the menu bar on the client screen.

3. Add or change information as required. (Note: Use the termination or deactivation processes to change user assignment to a client or client status. Click here to obtain information about working with client photos.)

4. Click Save.

5. Click Exit.

Terminate Client Assignment

Your center administrator may have chosen to use the Titanium termination feature. The termination feature creates a work flow process of tasks, notes and prompts to end a user's assignment to a client, and allow the user to document the termination in the client file. Click here if your center is not using the termination feature. If your center is using this feature, follow the steps below to terminate user assignment to a client.

1. Double click the termination task on your task list. (Note: If you create a note using the note type designated by your center administrator for termination notes, you will see prompts to guide you through the termination process.)

2. Click Yes on the pop-up box to remove the user assignment to the client. If you click No, the task will remain on your task list.

3. Handle termination note creation:

   - If your center administrator requires a termination note, click Ok on the pop-up box to create a note. Add the note as you normally would, including signing and locking the note. (Note: The termination note type and any required data forms were selected by your center administrator.)
   - If a termination note is optional, click Yes on the pop-up box to create a termination note. Add the note as you normally would, including signing and locking the note.

- If a termination note is optional and you do not want to create a note, click No to skip creating a termination note.

4. Click Yes to confirm that the user assignment is being terminated. If you click No, the task will remain on your task list.

5. Depending on the settings chosen by your center administrator, if all users have been unassigned from the client, a pop up box will appear prompting you to deactivate the client. Click Yes to change the client status to inactive. Click No to leave the client's status active.

6. Depending on the settings chosen by your center administrator, a pop up box will appear prompting you to restrict access to the client file. Click Yes to restrict the client file to assigned users. Click No to make no changes.

7. Handle deactivation note creation:

   - Depending on the settings chosen by your center administrator, a pop up box will appear prompting you to create a deactivation note.

   - Click Yes on the pop-up box to create a deactivation note. Add the note as you normally would, including signing and locking the note. (Note: The deactivation note type and any required data forms were selected by your center administrator.)

   - Click No to skip creating the deactivation note.

To terminate assignments to clients without the termination feature:

1. Search for the client.

2. Click the Edit icon on the menu bar on the client screen.

3. Click on the client security tab.

4. Click to uncheck the Active boxes for the desired users.

5. Click Save.

6. Click Exit.

7. Add a note to the client file, if required by your center administrator.

Deactivate a Client

Your center administrator may have chosen to use the Titanium deactivation feature. The deactivation feature creates a work flow of prompts and notes to deactivate the client, and allow the user to document the deactivation in the client's file. Click here if your center is not using the deactivation feature in Titanium. If your center is using this feature, follow the steps below to deactivate a client.

1. Navigate to the client screen.

2. Click Edit on the menu bar.

3. Click the Client Security Tab. If users are assigned to the client, for each user:

   - Click the user and click to uncheck the box in the Active column.

   - Click Yes on the pop up box to terminate the user assignment to the client.

   - Click Ok on the pop-up box.

   - Handle creating a termination note.

     - If your center administrator requires a termination note, click Ok on the pop-up box to create a note. Add the note as you normally would, including signing and locking the note. (Note: The termination note type and any required data forms were selected by your center administrator.)

     - If a termination note is optional, click Yes on the pop-up box to create a termination note. Add the note as you normally would, including signing and locking the note.

     - If a termination note is optional and you do not want to create a note, click No to skip creating a termination note.

   - Repeat for all remaining users.

4. If no users are assigned to the client, click to uncheck the Active box on the Contact Information tab.

5. Click Yes to deactivate the client.

6. Depending on the settings chosen by your center administrator, a pop up box will appear prompting you to restrict access to the client file. Click Yes to restrict the client file to assigned users. Click No to make no changes.

7. Depending on the settings chosen by your center administrator, a pop up box will appear prompting you to create a deactivation note. Click Yes on the pop-up box to create a deactivation note. Click No to skip writing the deactivation note.

8. Add the note as you normally would, including signing and locking the note. (Note: The deactivation note type and any required data forms were selected by your center administrator. If you create a note using the note type designated by your center administrator for deactivation notes, you will see prompts to guide you through the deactivation process.)

To deactivate clients without the termination feature:

1. Search for the client.

2. Click the Edit icon on the menu bar on the client screen.

3. Click in the Active box.

4. Click Save.

5. Click Exit.

6. Add a note to the client file, if required by your center administrator.

Delete a Client

You can delete a client if you have sufficient permission, and no notes or appointments have been added to the client file. It is recommended that clients be deactivated instead of deleted. Clients cannot be deleted if their files contain notes or appointments, unless each note and appointment is deleted first.

To delete a client:

1. Navigate to the client screen from:
    - Any screen that has Client icon on the menu bar (e.g., appointment screen, My Clients list)
    - From the calendar screen, click Open > Clients and search for the client

2. Click Delete on the menu bar on the client screen.

3. Click Yes to confirm.

4.2 Add/Edit/Delete Client Photo

What would you like to do?

- Add a photo
- Edit a photo

- Delete a photo

Add a Photo

1. Obtain a client photo that meets the following minimum criteria:

   - Format: .jpg, .jpeg, .png, .gif, .wmf, .emf
   - At least 78 x 77 pixels (Note: If the photo is larger than 1024 x 768, it will be automatically resized to 1024 x 768.)

2. Navigate to the Contact Information tab of the client's screen.

3. Click Edit on the menu bar.

4. Click and drag the client photo onto the photo place holder square at the right side of the Contact Information tab. (Note: If you hover your mouse over the photo, a pop-up window will appear showing a larger version of the photo.)

5. Click Save.

6. Click Exit.

Edit a Photo

1. Navigate to the Contact Information tab of the client's screen.

2. Click Edit on the menu bar.

3. Click the photo place holder square.

4. On the Edit Photo pop up window, click Open on the menu bar and navigate to select the photo.

5. Click and drag on the photo with your mouse to select a rectangular area to be displayed on the Contact Information tab. (Note: If the area you drew is incorrect, click Clear Selection on the menu bar and repeat this step.)

6. Click Ok.

7. Click Save.

8. Click Exit.

Delete a Photo

1. Navigate to the Contact Information tab of the client's screen.

2. Click Edit on the menu bar.

3. Right click on the client photo.

4. Click Delete.

5. Click Save.

6. Click Exit.

4.3 Add/Edit/Remove Flags

Your center administrator may choose to use flags to communicate vital client information at a glance. Flag descriptions, and behaviors are set by your center's administrator. Flags set as "critical" by your center administrator will show as red throughout the program. Other flags will show as white on a green background.

The Flags button appears on the menu bar of several screens in Titanium (e.g., appointment, client file, client screen). If a flag has been assigned for a client, the Flags button will be colored and a small flag icon will appear throughout the program when the client's name is shown (e.g., My Clients list, appointment screen/blocks, on search lists, etc.).

What would you like to do?

- Add a flag
- Edit a flag
- Remove a flag

Add a Flag

1. Click the Flags button on the menu bar on any screen on which it appears.

2. Click Manage Flags. The client screen will open with the Client Flags tab selected.

3. Click Add.

4. On the Add Client Flag pop-up window, use the pull down menu to select the desired flag, and enter a description if desired.

5. Click OK.

6. Click Save.

7. Click Exit.

Edit a Flag

1. Click the Flags button on the menu bar on any screen on which it appears.

2. Click Manage Flags. The client screen will open with the Client Flags tab selected.

3. Click on the desired flag.

4. Click View/Edit.

5. Make desired changes, and click OK.

Remove a Flag

Deleting flags will remove them from Titanium and they will not be available for reporting purposes. Unless the flag was entered in error, it is recommended that flags be deactivated when no longer applicable.

1. Click the Flags button on the menu bar on any screen on which it appears.

2. Click Manage Flags. The client screen will open with the Client Flags tab selected.

3. Click on the desired flag.

4. To deactivate the flag, click Deactivate. Enter the reason and click OK.

5. To delete the flag, click Delete.

6. Click Yes.

4.4 Add/Edit Demographics

Demographic information for clients is recorded on a data form which is attached to a note in the client's file. The data form was created or chosen by your center's administrator. The instructions on this page are for use of the demographics icon on the menu bar on the client screen. If your center administrator has not enabled the icon, you can work with the data form by manually attaching it to a note.

What would you like to do?

- Add a new demographics form
- Edit a demographics form

Add a New Demographics Form

1. Search for the desired client.
2. Click the Demographics icon on the menu bar on the client screen.
3. To copy and edit a prior form, click Copy (latest date) demographics to new. To add a new demographics form from scratch, click Add new.
4. Enter (or edit) required information.
5. Click Save.
6. Click Exit.

Edit a Demographics Form

If your center has clients complete paperwork via the online web component or uses the client import feature, some or all demographics data may be completed automatically using these tools. If some data has already been entered, you may need to edit the demographics form.

1. Search for the desired client.

2. Click the Demographics icon on the menu bar on the client screen.

4. Click Open Latest.

5. Click Edit.

6. Make desired changes.

7. Click Save.

8. Click Exit.

4.5 Disabled Clients

Your center administrator may choose to activate the disability tab for clients. On the disability tab, users can track disabilities and accommodations, using the lists created by your center administrator. If your center has a third-party document creation/editing software like Microsoft Word, you might be able to create accommodation letters for your clients.

What would you like to do?

- Add Disabilities/Accommodations
- Delete Disabilities/Accommodations
- Create Accommodation Letters

Add Disabilities/Accommodations

1. Navigate to client screen from:
   - Any screen that has Client icon on the menu bar (e.g., appointment screen, My Clients list)
   - From the calendar screen, click Open > Clients and search for the client
2. Click Edit on the menu bar on the client screen.
3. Click the Disability tab.
4. Click in the text boxes to record the name and email address of the client's adviser, if desired.
5. Click the Add button next to either the disabilities or accommodations section.
6. Use the pull down menus to select the desired disability/accommodation.
7. For disabilities, select the desired status from the pull down menu.
8. For accommodations, click to enter the effective and expires dates for the accommodation.
9. Click in the text box to add a brief comment or description regarding the disability/ accommodation. (Note: Do **not** enter confidential information in these fields. The information on this tab is viewable by all users.)
10. Repeat steps 4-9 to add additional disabilities/accommodations as desired.
11. Click Save.
12. Click Exit.

Delete Disabilities/Accommodations

1. Navigate to client screen from:
   - ○ Any screen that has Client icon on the menu bar (e.g., appointment screen, My Clients list)
   - ○ From the calendar screen, click Open > Clients and search for the client
2. Click Edit on the menu bar on the client screen.
3. Click the Disability tab.
4. Click on the desired disability or accommodation.
5. Click the Delete button.
6. Repeat Steps 4-5 as desired.
7. Click Save.
8. Click Exit.

Create Accommodation Letters

This process is recommended for centers that need to create accommodation letters for multiple clients at the same time. You can use Titanium's form letter process to create accommodation letters for one client at a time.

The process detailed here requires the use of Microsoft Word, a third-party software, but other software might be used. You will be unable to follow this process unless your center administrator has given you access to export raw data from Titanium.

1. From the schedule screen, click Reports on the menu bar.

2. Click Export Data.

3. For data to export, use the pull down menu to choose Client Accommodations.

4. Choose the date range. (Note: This is the date when the accommodation was marked as effective on the disability tab in the client screen.)

5. Click the check boxes to include client identifying information.

6. Use the pull down menu to choose .csv as the Export Data type.

7. Use the windows interface to save the .csv file on your computer.

8. Open the .csv file to review/change the names of the column headers.

9. Create the accommodation letter as a Word template, using the desired column headers as data fields. (Note: Titanium Support cannot provide assistance with Word or Excel. You should use the Help in Word for more information about Steps 8-11. (https://support.microsoft.com/en-us/kb/294683)

10. Use the mail merge function in Word, by choosing the .csv file as the data source for the merge.

11. Save the new Word file containing the accommodation letters.

12. Distribute accommodation letters as desired.

4.6 Add Form to Client File

You can add data forms created or approved by your center administrator (e.g., intake, assessment, survey) or scanned hard copy documents to a client's file as part of a note.

What would you like to do?

- Add a data form to a client file
- Add a hard copy document to a client file
- Print data form for client

Add a Data Form

Depending on your center's settings, you can click the Demographics or Short Cuts icons on the menu bar on the client screen to choose data forms to be added to the client file, including copying and updating a prior form. Complete the form, and click Save and Exit. If the forms that you want are not available, follow the steps below:

1. Add a note as you normally would.
2. Click the Data Forms icon on the note menu bar.
3. Click the desired form from the list.
4. Complete the data form.
    - Enter the desired information on the form.

- Update prior data form:
  - Click Copy on the menu bar.
  - Hover over "Copy Data From Previously Entered Data Form." (Note: Data entered on one form cannot be copied to a different form, only to a new instance of the same data form.)
  - Click to select the prior version.
  - Edit the desired information on the new data form.

5. Click Save.

6. Click Exit.

7. Complete the note as you normally would.

(If your center uses CCAPS data forms, you should consult the CCAPS 2015 User Manual from CCMH for more information.)

Add Hard Copy Document

Documents cannot be directly scanned into a client's file. Because documents cannot be scanned to a client's file, there are no specifications or recommendations regarding the type of scanner used. Any file type can be attached to notes in Titanium, including emails, text files, and .pdfs.

To add scanned documents to a client file, first scan the documents and save in a location on your computer. Then follow the steps below.

1. Add a note as you normally would.

2. Click the Attach icon on the note menu bar.

3. Click Attach a File.

4. Use the Windows interface on your computer to locate the file(s) to be attached. (Note: File size is limited to 16 mb.)

5. Click the file(s) to select, and click Open.

6. Use the pull down menu to select a description, or type in a description of the file. (Note: If multiple files have been selected, then no description box will be displayed. To add descriptions, complete Step 7, click on the Attach icon, hover over the desired attachment and click Edit Description.)

7. Click Close to return to the note.

8. Complete the note as you normally would.

9. Delete the files from your computer. (Note: Files are stored in the secure Titanium database after being attached to the note, and do not need to be stored in a separate location. Depending on the settings chosen by your center administrator, files may automatically be moved from one system file to another when they are attached to notes. If files seem to disappear after this process, consult with your center administrator regarding system settings.)

Print Data Form for Client

Centers that do not use the web component might want to print a data form for a client to complete manually. Then the client's answers can be added to the client file by transcribing their answers. A form printed using this process will have the client's name at the top, so it should be used only for that client. Contact your center administrator for assistance in printing blank data forms that do not have a client name.

Printing blank forms requires a third party program which can be used to manipulate images. Instructions are given here for use of Adobe Acrobat and MS Excel.

1. Add a note as you normally would.

2. Click the Data Forms icon on the note menu bar.

3. Click the desired form from the list available for your use.

4. Click the Copy icon for the pull down menu.

5. Choose Copy screen capture of data form to clipboard.

6. Click Save and Exit. (Note: If there are required questions on the data form, you will not be allowed to save the blank form. Instead, click Cancel to leave the screen without saving the form and click Yes on the pop up box to confirm.)

7. To save the note to enter the data form later, click Save and Exit. (To leave the screen without saving the note, click Cancel, and click Yes on the pop-up box to confirm.)

8. To use Adobe Acrobat:
   - Open Acrobat.
   - Click File > Create > PDF from Clipboard
   - Click File > Print
   - Look at the print preview to ensure that multiple pages are shown. If not, under Page Sizing and Handling, click Poster.
   - Click Print.

9. To use Microsoft Excel:
   - Open Excel
   - Right click on cell A1, and choose Paste.
   - Click Page Layout > Margins, and choose Narrow
   - Click View ribbon > Page Layout
   - If the image is too wide, scroll down to find a circle control. Click and drag to the left to resize to a single page.
   - Click File > Print, and click Print.

4.7 Email Clients

1. Navigate to a screen with an Email All icon on the menu bar (e.g. My Clients, Advanced Client Search, clients tab of a group appointment screen, etc.).

2. If necessary, use the function on that screen to search for the desired clients.

3. Click the Email All icon.

4. On the pop-up screen, you will see information about the clients email address/preferences.

   - Click Yes to open a new message in your email program and copy client email addresses to the bcc field (Note: If you are emailing more than 100 clients, this may not be successful and you should choose No and follow the instructions below.)

   - Click No to copy the client email addresses to your computer's clipboard

   - Click Cancel to stop the email function (i.e., to edit client screens with email addresses/ preferences)

5. If you clicked No on the information message:

   - Open your email program.

   - Open a new email message.

6. Use your email program as you normally would to create and send the email message.

Click here for instructions to send appointment reminders via email.

4.8 Text Clients

Your center may have purchased the ability to send SMS text messages. Each text will incur a charge. To view your credit balance, from the calendar screen, click Open > Client Appointment Reminders. The remaining balance is in the lower left corner. Your center administrator should visit our website to add credit to the SMS text account. If a center exceeds their credit, they will not be allowed to send SMS text messages.

Clients can stop receiving text messages by replying STOP, UNSUBSCRIBE, CANCEL OR QUIT. Clients can resume receiving text messages by replying START or YES. Other responses will not be received or processed. Client responses do not affect any "ok to contact" settings on the client contact tab of the client screen.

Click here for instructions to send appointment reminders via text.

Text a Group of Clients

1. From the calendar screen, click Open > Advanced Client Search. (Note: If you do not have sufficient permission, you will be unable to use this feature.)

2. Choose Client Fields, and check "Exclude non-SMS-able."

3. Choose other desired filters (e.g. appointment dates, attendance status)

4. Click Search on the menu bar.

5. Click SMS (Text) All on the menu bar.

6. Choose the desired message from the list created by your center administrator.

7. Click Yes.

8. Click Ok on the confirmation message.

4.9 Review Client File

The client file contains appointments and notes. Entries for client allergies, MedLog, diagnoses, disabilities and invoices will be shown at the top of the client file, if they have been activated by your center administrator. If your center is not using these features, these entries will not be displayed. The remainder of the file will be entries for appointments and notes. The diagnoses, medications, data forms and attachments that are part of the note will be displayed as icons associated with the note.

Items placed in the wrong client file cannot be moved. They must be manually recreated in the correct client file.

If you are not assigned to a client, you may not have rights to view the client's file, or may view only limited content.

Open a Client's File

1. Right click on an appointment for the desired client, and choose client file from the menu bar, or

2. From your My Clients list, click to select the desired client and click the Client File icon on the menu bar, or

3. Search for the client. Open the client screen and click on the Client File icon on the menu bar.

Search for Items in a Client's File

1. To expand or collapse an entry, click the plus and or minus sign to the left of it.

2. To expand or collapse all entries, Click the Expand All and Collapse All buttons.

3. To search for specific types of entries, choose them from the Filter pull down menu.

Print a Client's File

1. Open a client's file.

2. Click the Print icon on the menu bar.

3. Use the check boxes and pull down menus to select the items to be printed.

4. Click Print.

(Note: There are no print set up options for client files. To print with your institution or center logo, use pre-printed letterhead paper.)

4.10 Search for Clients

My Clients list

1. On the calendar screen, click Open > My Clients

2. If you have permission as a supervisor, use the pull down menu to change the user to see

    - Clients assigned to other users

    - Clients assigned to your trainees

Single Client Search

1. From the calendar screen, click Open > Clients

2. Enter the Student ID and press the tab key, or enter the full or partial last name, or email or phone number and click Find.

3. If required, double click on the client from the search results list. (Note: If you right click on an entry, it will open. When you click Exit, you will be returned to the search screen.)

Multiple Clients: Advanced Client Search feature

1. From the calendar screen, click Open > Advanced Client Search.

2. Set the search filters (e.g., users, appointment types, attendance, dates, client flags, data forms, invoices, disabilities, accommodations, etc.)

3. Click Search.

4. Click a client in the search results, and click the Client or Client File icons to see their information.

4.11 Form Letters

Titanium allows users to populate selected fields in a Word template using the data from the client record. You can only generate one form letter at a time, for one client at a time. You must have Word installed on your computer. Click here for instructions on how to create multiple letters at the same time.

What would you like to do?

- ○ Create a form letter
- ○ Generate a form letter

Create a Form Letter

(Note: Click here to create bulk accommodation letters for clients with disabilities.)

1. Open Word.

2. Use Word to create a form letter. (Note: If you need assistance, click Help inside Word and search for mail merge or form fields. To use fields multiple times in the same template, navigate to Insert > Field > Quick Parts > 'Ref'. This will list all of the bookmarks available to choose for this reference..) The following Titanium fields are available for use:

Description	Field Name	Example
Student ID	R_STUDENTID	JC123
File Number	R_FILENO	FNJC123
Date of Birth	R_DOB	01/01/1998
Age	R_AGE	20
First Name	R_FNAME	Joseph
Middle Name	R_MNAME	D
Last Name	R_LNAME	Client
First and Last Name	R_FULLNAME	Joseph Client
Last Name, First Name	R_LASTFIRST	Client, Joseph
Phone 1	R_PHONE1	7135551212
Phone 2	R_PHONE2	4095551212
Address 1	R_ADDRESS1	5678 University Drive Apt. 23 Collegetown, TX 77999
Address 2	R_ADDRESS2	123 Parent's House Lane Hometown, TX 77555
Registration Date	R_REGDATE	08/31/2019
Status	R_STATUS	Enrolled

Comment	R_COMMENT1	Free Text
User defined Comment 1	R_COMMENT1	Free Text
User defined Comment 2	R_COMMENT1	Free Text
User defined Comment 3	R_COMMENT1	Free Text
Accommodations	R_ACCOMMODATIONS	30 minutes extra test time (all accommodations will be listed, separated by a comma)

3. Save the template.
4. In Titanium, navigate to Open > Form Letters.
5. Click Manage Form Letters.
6. Click Import and use the Windows interface to select the form letter.
7. Click Save and Exit.

Generate a Form Letter

1. In Titanium, click Open and Form Letters.
2. Use the pull down menu to select the desired form letter.
3. Click Select client.
4. Use the Find/Add screen to locate and select the desired client.
5. Click Load Form and Client. (Note: Word will automatically open the completed form letter.)
6. Use Word to finish desired actions like printing or saving the form letter.

5 Electronic Prescribing

Electronic prescribing is an optional feature which may have been purchased by your center. This feature is available to clients in the United States only. It allows prescribers to access a third party portal in which prescriptions can be written and reviewed. Limited client information is transferred into the portal from Titanium (client name, date of birth, sex, address).

Your should ask your center administrator whether you have rights as a transcriber or a prescriber. For complete instructions on portal use, navigate to Open > eRx, and click the Training Videos link in the upper right corner of the portal.

Set Up Controlled Substances Prescribing

Prescribers of controlled substances will use one of their own mobile devices (e.g. cell phone, tablet) for two step authentication.

1. Click the link in the email from Change Healthcare inviting you to set up an identity verification account with ID.me.

2. Click to sign up for a new account.

3. Open your email, and click on the link in the email to verify your account. Then close the email tab on your browser.

4. Click to select the ID.me authenticator and enter your phone number.

   - Open your text messages and click the link in the new message.
   - Click to download the app from Google Play or the Apple app store
   - When the app opens, click to Allow the authenticator notifications.
   - Click the green check mark to approve the sign in.
   - Close the app on your phone.

5. On the web browser, click Generate Recovery Code. Write down and store the code, and click the I Have Copied the recovery code button on your browser.

6. On the verification screen, click to use your driver's license or other state ID, or your passport.

   - Click Take Picture with My Phone
   - Enter your phone number and click Continue.
   - Open your text messages and click the link in the new message. A new app opens on your phone.
   - Position your ID horizontally on a dark, non-reflective surface. Click I'm Ready to Take a Photo.
   - Click Take a Photo of the Front. Position your phone directly over your ID and click on your phone's picture app to take the photo.
   - Click Continue with this photo, and click Take Photo of Back.

- o Turn over your ID and take the photo.
- o Click Look Good button.
- o Close the phone app

7. On your web browser, you should see confirmation of your photo upload. Fill in any missing personal information and click Continue.

8. Enter your phone number and click Continue. Then check the box next to the "I Attest" statement and click Continue.

9. Click Begin on the Medical ID verification. Enter your NPI and DEA numbers and click Continue.

10. Click Continue and wait until the verification is complete.

11. Click Allow. You should see a confirmation screen and receive an email. If your identity is not verified, follow the online prompts to try again or set up a help session with ID.me.

12. Get your EPCS PIN number from your center administrator. (Note: This is NOT the PIN number that you created on the Universal Identity website.)

13. In Titanium, navigate to Open > eRx.

14. On the portal window, click Admin > Account Management > Manage Caregiver.

15. Click the Approve button.

16. Enter the EPCS PIN number received from your center administrator.

17. If you chose to use a code generator, open the app on your phone and enter the code into the website. If you chose to receive push notifications, click the Push button and tap the notification on your phone.

19. Click Sign.

20. Click Close on the confirmation message.

Manage Preference Lists

Lists of commonly used diagnoses, pharmacies and prescriptions can be created to simplify data entry. Site admins can create lists for the facility. Prescribers can create lists for their own use. When a list has been created, it can be accessed by pull down menu or on the search window for various fields on the prescription.

1. Click Open > eRx

2. On the menu bar, click Admin > Preference Lists.

3. Choose the desired list.

4. Use the screen to search for items to add to the list, and enter preference.

5. Click Select to add to the list. Click an item and click Remove to remove it from the list.

5.1 Add Prescriptions

What would you like to do?

- ○ Document medicine that a client reports taking
- ○ Document a medicine that I'm prescribing
- ○ Prepare prescription to be issued

Document a Medicine that a Client Reports Taking

1. Navigate to the eRx portal by:

   - ○ Right click on an individual appointment, and click eRx
   - ○ From the client screen or client file, click eRx on the menu bar
   - ○ Click Open > eRx, click Find Patient on the menu bar, and search for the client (Note: Electronic prescribing does not support special characters or punctuation marks in the name field like tildes. If your client's name has special characters, those characters must be removed to prescribe medications.)

(Note: You may see a message that some fields are required. If so, edit the field on the client record, and then return to the eRx portal.)

2. Click the Rx History tab. (Note: The drop down menu defaults to active prescriptions. Click All Prescriptions to see the client's history associated with Titanium users.)

3. Click External Drug History.

4. If the prescription(s) being reported by the patient are listed, click to select the prescriptions and click Add Selected to History. If not, click Close. (Note: Only prescriptions paid for with insurance plans will be shown.)

5. Click Reported Rx.

6. Add information for the prescription (e.g. date, drug, SIG, quantity, fill date, refills, pharmacy, and prescriber etc.) (Note: The magnifying glass allows searching for items. The pull down

arrow allows access to the saved favorites list or recommended items, depending on the field.)

7. Click Save to save the prescription to the patient history.

Document a Medicine that I'm Prescribing

1. Navigate to the eRx portal by:

   - ○ Right click on an individual appointment, and click eRx
   - ○ From the client screen or client file, click eRx on the menu bar
   - ○ Click Open > eRx, click Find Patient on the menu bar, and search for the client (Note: Electronic prescribing does not support special characters or punctuation marks in the name field like tildes. If your client's name has special characters, those characters must be removed to prescribe medications.)

(Note: You may see a message that some fields are required. If so, edit the field on the client record, and then return to the eRx portal.)

2. Click the Rx History tab. (Note: The drop down menu defaults to active prescriptions. Click All Prescriptions to see the client's history associated with Titanium users.)

3. Click New Rx.

4. On the Benefit Plan, click the Select button next to the patient's insurance plan. Click Use None if the patient does not have insurance.

5. Add information for the prescription (e.g. date, drug, SIG, quantity, fill date, refills, pharmacy, and prescriber etc.) (Note: The magnifying glass allows searching for items. The pull down arrow allows access to the saved favorites list or recommended items, depending on the field.)
   - ○ Depending on the insurance plan, you may see a list of preferred medications, generics, copays, and drug tiers. Select the desired medication, or click Keep Current Drug.
   - ○ Choices on "issue via" depend on your permission level. For controlled substances, prescribers must be set up for EPCS to issue electronically. After clicking issue, users will be prompted to enter the passphrase they created and either open the app on their cell phone or enter a passcode from their phone app. (If you forget your passphrase, contact your system administrator to ask that it be reset.)
   - ○ Depending on the patient history, DUR warnings may appear. Enter override reasons for each warning and click "Accept & Return". Or click Close and issue a different medication.

6. Click Issue.

7. Click Exit to return to the eRx portal home screen.

Prepare a Prescription to be Issued

Transcribers can prepare prescriptions to be issued by prescribers.

1. Navigate to the eRx portal by:

   - ○ Right click on an individual appointment, and click eRx
   - ○ From the client screen or client file, click eRx on the menu bar
   - ○ Click Open > eRx, click Find Patient on the menu bar, and search for the client (Note: Electronic prescribing does not support special characters or punctuation marks in the name field like tildes. If your client's name has special characters, those characters must be removed to prescribe medications.)

(Note: You may see a message that some fields are required. If so, edit the field on the client record, and then return to the eRx portal.)

2. Click the Rx History tab. (Note: The drop down menu defaults to active prescriptions. Click All Prescriptions to see the client's history associated with Titanium users.)

3. Click New Rx.

4. On the Benefit Plan, click the Select button next to the patient's insurance plan. Click Use None if the patient does not have insurance.

5. Add information provided by the prescriber (e.g. date, drug, SIG, quantity, fill date, refills, pharmacy, and prescriber etc.) (Note: The magnifying glass allows searching for items. The pull down arrow allows access to the saved favorites list or recommended items, depending on the field.)

6. Click Hold.

(Remaining steps are completed by a prescriber.)

7. Click Open > eRx.

8. Click the underlined number next to New Rx(s) on the home screen of the portal.

9. Click to check the prescription.

10. Click Authorize.

5.2 Edit Prescriptions

What would you like to do?

- Edit a prescription that has been placed on hold
- Edit a prescription that has been issued (renew)
- Void a prescription
- Cancel a prescription
- Discontinue a prescription

Edit a Hold Prescription

These steps will allow you to edit a prescription created by a transcriber and placed on hold to be issued.

1. Click Open > eRx.

2. Click the underlined number next to New Rx(s) on the home screen of the portal.

3. Click to check the prescription.

4. Click Details.

5. Edit the prescription, as desired.

6. Click Issue.

Edit an Issued Prescription

Prescriptions that have been issued can be discontinued or voided. To change an issued prescription, it must be renewed.

1. Navigate to the eRx portal by:

    - Right click on an individual appointment, and click eRx
    - From the client screen or client file, click eRx on the menu bar

- Click Open > eRx, click Find Patient on the menu bar, and search for the client

(Note: You may see a message that some fields are required. If so, edit the field on the client record, and then return to the eRx portal.)

2. Click the Rx History tab. (Note: The drop down menu defaults to active prescriptions. Click All Prescriptions to see the client's history associated with Titanium users.)

3. Click to select the desired prescription in the list.

4. Click Renew.

5. Make the desired changes.

6. Click Issue.

Void

1. Navigate to the eRx portal by:

   - Right click on an individual appointment, and click eRx
   - From the client screen or client file, click eRx on the menu bar
   - Click Open > eRx, click Find Patient on the menu bar, and search for the client

(Note: You may see a message that some fields are required. If so, edit the field on the client record, and then return to the eRx portal.)

2. Click the Rx History tab. (Note: The drop down menu defaults to active prescriptions. Click All Prescriptions to see the client's history associated with Titanium users.)

3. Click to select the desired prescription in the list.

4. Click the Void button.

5. Click Ok.

Cancel

1. Navigate to the eRx portal by:

   - Right click on an individual appointment, and click eRx

○ From the client screen or client file, click eRx on the menu bar

○ Click Open > eRx, click Find Patient on the menu bar, and search for the client

(Note: You may see a message that some fields are required. If so, edit the field on the client record, and then return to the eRx portal.)

2. Click the Rx History tab. (Note: The drop down menu defaults to active prescriptions. Click All Prescriptions to see the client's history associated with Titanium users.)

3. Click to select the desired prescription in the list.

4. Click the Cancel button.

5. Click Ok.

Discontinue

1. Navigate to the eRx portal by:

○ Right click on an individual appointment, and click eRx

○ From the client screen or client file, click eRx on the menu bar

○ Click Open > eRx, click Find Patient on the menu bar, and search for the client

(Note: You may see a message that some fields are required. If so, edit the field on the client record, and then return to the eRx portal.)

2. Click the Rx History tab. (Note: The drop down menu defaults to active prescriptions. Click All Prescriptions to see the client's history associated with Titanium users.)

3. Click to select the desired prescription in the list.

4. Click the Discontinue button.

5. Enter a reason.

6. Click Ok.

5.3 Refill Requests

If your center administrator configured electronic refill requests, prescribers can authorize requests in the electronic prescribing portal. To authorize electronic requests from pharmacies:

1. Click Open > eRx.

2. Click the underlined number next to Renewal Rx(s) on the home screen of the portal.

3. Click to check the desired prescription.

4. Click Match and search for the client. (Note: This will add the renewal to the client's RX history.)

5. To edit the refill request, click Review and then edit the prescription.

5. Click Authorize. (Note: To deny, click the renewal request, click Deny and enter a reason.)

6 My Clients List

The My Clients list provides the user with a personal list of clients to whom they are assigned. To open your My Clients list, from the calendar screen, click Open > My Clients.

If a user is listed on the security tab of the client record, then the client will be shown on that user's My Clients list. By default, only active clients are displayed. Additionally, the list shows only clients for whom the user is actively assigned. If you have been given permission as a supervisor, you can view another user's My Clients list by selecting their name from the pull down menu.

The screen also provides appointment statistics for your clients, which can be hidden by unchecking the Statistics box in the upper, right corner of the screen. To filter the list to view clients who have attended a certain type of appointment, select the appointment code from the pull down menu and set the attended appointments to a number greater than 0. Right click on the column headers for options to sort, rearrange columns, choose columns or save/export the table.

You can click to select a client, and then use the menu bar icons to navigate to the client's record or file. You also have the option to email all clients from the list who have email addresses entered and for whom email is set as "ok to contact."

If a check mark appears in the Active column, it means that the user appears on the Security tab of the client record with a check mark. Usually this means that the user is providing services to the client. If no check mark appears in the active column, then the user is still shown on the client's Security tab, but there is no check mark. This means that the user is inactively assigned. Usually this means that the user previously provided services but is no longer doing so. If you click the "terminate" button for a client, then your active assignment to the user is changed to inactive.

To locate specific groups of clients, use the following filter settings:

Clients who are active but not assigned to any user:
- Show clients for: All
- Include clients that are: Active
- Include clients with users that are: Not assigned

All active clients:
- Show clients for: All
- Include clients that are: Active
- Include clients with users that are: Actively assigned, inactively assigned, not assigned

All clients:
- Show clients for: All
- Include clients that are: Active, inactive
- Include clients with users that are: Actively assigned, inactively assigned, not assigned

7 Notes

Notes are stored in the client file. Notes can be associated with appointments, but notes can be added that are not related to appointments. Non-client notes can be created to track interactions with individuals who are not clients. There are three types of notes in Titanium:

- **General use notes:** Normally used for file maintenance (e.g., add intake paperwork or forms completed by clients to file), can be viewed by all users
- **Progress notes:** Confidential note that can only be created/viewed by users with sufficient permissions. Used to document appointments, diagnoses, medications, or to add forms or attachments to client files.
- **Process/Psychotherapy:** Confidential note that can only be created/viewed by users with sufficient permissions. Used to document treatment process .

Your user and supervisor permission levels will affect the notes that you can create, sign, view and edit.

Notes can include the following sections:

- Narrative (information entered in the narrative is not searchable/reportable)
- Data forms (i.e., assessments, checklists, intake forms, etc. used to capture searchable/ reportable data)
- Attachments
- Depending on the settings chosen by your center administrator:
    - Diagnosis
    - Medication (document medications prescribed by a Titanium user or reported by clients)

Your center administrator has configured the notes required for various types of appointments, and sections available for each type of note.

If your center uses supervision features, see the Supervision section for information about intern notes.

7.1 Add/Edit/Delete Note

What would you like to do?

- Add a note

- Edit an unlocked note
- Edit a locked note
- Delete a note

Add a Note

You do not have to complete notes all at once. Click Save and Exit to save your note. Open the note and click Edit to continue writing. Depending on the settings chosen by your center administrator, Titanium will create note back ups periodically, and back ups can be recovered in the event of system failure. (Note: Click here for the process to create termination or deactivation notes, if your center is using this feature. Click here for the process to create intern notes, if your center is using the supervision features.)

1. To open a note:

- Click the note task on your task list, or
- Right click on the appointment and click Client Note, or
- Click on the appointment to open it, and click the Client Note icon on the menu bar, or
- Open the client file, click the New Note icon on the menu bar, and click Yes to confirm that you are creating a note not related to an appointment

2. On the Narrative tab, choose the note type from the pull down menu. (Note: Depending on the settings chosen by your center administrator, the note type may default.)

3. Complete the note narrative.

- Date and time automatically populate. Use the controls to make desired changes. (Note: Your center administrator may choose to not display note date and time.)
- Enter desired information in the text box on the Narrative tab.
- If desired, right click to choose a note template which is outline created by your center's administrator. (Note: Your center administrator may have chosen a default template which will appear in the narrative tab.)
- If desired, right click to open to full screen view or use the spell check function. (Note: Users can click Options on the Spell Check tab to change the color used to indicate misspelled words. Titanium will retain the user settings. This is useful for users who are red/green color blind.)

4. To review or copy/paste narrative text from prior notes:

- Click the Save icon on the menu bar.

- Click Navigate.
- Choose the desired note to review.
- Highlight the desired text and press Ctrl + C on your keyboard
- Click Navigate to return to the current note.
- Click in the narrative text box, and press Ctrl + V on your keyboard (or right click and choose Paste from the menu).

5. If desired, click the Diagnosis tab and add a diagnosis.

6. If desired, click the Data Form icon on the menu bar and add data form(s).

7. If desired, click the Attach icon on the menu bar and add attachments.

8. On the narrative tab, click the highest number available to you to sign the note. If you signed on Line 3, click Yes to confirm that you want to lock the note. (Note: Your center administrator may choose to require attachments, data forms, diagnoses or medical information as part of specific note types. If you do not include the required elements, you will see a warning that the required element must be added before the note can be signed.)

9. If you signed on Line 1 or 2, forward the note for review:

   - If necessary, use the pull down menu to select the reviewer.
   - If desired, add a Forward To message.

10. Click Save.

11. Click Exit.

Edit an Unlocked Note

Unlocked notes are either unsigned, or signed on Lines 1 or 2.

1. From the client file or appointment, open the note.

2. Click the Edit icon on the menu bar. (Note: If the note has been signed on Line 1 or 2, the user who signed the note must click to remove their signature.)

3. Make desired changes.

4. Sign the note as you normally would, including forwarding the note for signature.

Edit a Locked Note

Locked notes (signed on Line 3) cannot be changed by users, including information on the narrative and diagnosis tabs, data forms, attachments, and medication tab (if being used). However, addenda can be added to the narrative text.

1. From the client file or appointment, open the note.

2. Click the Edit icon on the menu bar.

3. Click the Addendum icon on the menu bar. (Note: The original signature information will be added under the original narrative, and the addendum narrative box will appear below.)

4. Type the desired narrative in the addendum. The addendum text box has the same functionality as the note narrative text box.

5. Sign the addendum in the same way that you sign notes, including forwarding for signature.

Delete a Note

Locked notes (signed on Line 3) cannot be deleted.

1. From the client file or appointment, open the unlocked note.

2. If the note has been signed on Line 1 or 2, the user who signed the note must click to remove their signature.

3. Click the Delete icon on the menu bar.

4. Click Yes to confirm.

7.2 Add Attachment to Other Appointment

Notes cannot be associated with "other" appointment types. Users can add attachments to "other" appointments for documentation purposes (e.g. staff meeting agendas.) To add an attachment:

1. Double click to open the appointment.

2. Click Edit on the menu bar.

3. Click the Attach icon on the menu bar.

4. Use the Windows interface on your computer to locate the file(s) to be attached and click Open. (Note: File size is limited to 16 mb.)

5. Click the file(s) to select, and click Open.

6. Use the pull down menu to select a description, or type in a description of the file.

7. If multiple files have been selected, then no description box will be displayed. To add descriptions, click on the Attach icon, hover over the desired attachment and click Edit Description.

7.3 Group Notes

To track progress for every member of a group, you can use group notes. After a group note has been distributed to client files, it cannot be edited but client-level addenda to the note narrative can be added. (Note: Click here for the process to create notes for intern groups, if your center is using supervision features.)

What would you like to do?

- Add a group note
- Add a client note related to a group note
- Edit an unlocked, undistributed group note
- Edit a locked, undistributed group note
- Delete a group note

Add a group note

1. Open the group appointment screen by clicking on the group appointment on the calendar screen, or clicking on the group note task on your task list.

2. If it has not already been done, mark attendance for the appointment.

3. Click the Group Note icon on the menu bar. (Note: If your center is using CCAPS, you can click on the Group CCAPS icon on the menu bar to view CCAPS for individual group members.)

4. Create and sign the note as you normally would.

5. After the note has been signed on Line 3 and saved, click the Distribute icon on the group note menu bar.

6. On the pop-up box, click a button to select the client files to which to distribute the group note.

7. Click OK to confirm.

Add a Client Note Related to a Group Note

1. Open the group note in the client's file by:
    - Click on the clients tab in the group appointment screen, select the desired client and click the Client Note button or
    - Open the client's file and click on the group note inside the client's file.

2. Click the Edit icon on the menu bar.

3. Click the Addendum icon on the menu bar.

4. Add an addendum to edit the note as you normally would.

Edit an Unlocked and Undistributed Group Note

Unlocked notes are either unsigned, or signed on Lines 1 or 2.

1. Open the group appointment screen by clicking on the group appointment on the calendar screen.

2. Click the Group Note icon on the menu bar.

3. Click the Edit icon on the menu bar. (Note: If the note has been signed on Line 1 or 2, the user who signed the note must click to remove their signature.)

4. Make desired changes.

5. Sign the note as you normally would, including forwarding it for signature.

Edit a Locked and Undistributed Group Note

Locked notes (signed on Line 3) cannot be changed, including information on the narrative tab, data forms, and attachments. However, addenda can be added to the narrative text if the note has not been distributed. If a note has been distributed, it cannot be edited at the group level, but a related client-level note narrative addendum can be added.

1. Open the group appointment screen by clicking on the group appointment on the calendar

screen.

2. Click the Group Note icon on the menu bar.

3. Click the Edit icon on the menu bar.

4. Click the Addendum icon on the menu bar. (Note: The original signature information will be added under the original narrative, and the addendum narrative box will appear below.)

5. Type the desired narrative in the addendum. The addendum text box has the same functionality as the note narrative text box.

6. Sign the addendum the same way that you sign notes, including forwarding for signature.

Delete a Group Note

Locked notes (signed on Line 3) and distributed group notes cannot be deleted.

1. Open the group appointment screen by clicking on the group appointment on the calendar screen.

2. Click the Group Note icon on the menu bar.

3. Click the Edit icon on the menu bar. (Note: If the note has been signed on Line 1 or 2, the user who signed the note must click to remove their signature.)

4. Click the Delete icon on the menu bar.

5. Click Yes to confirm.

7.4 Supervisor Review

1. From the calendar screen, click Open > Task List.

2. Double click on the Review Note or Sign Note task on your task list to open the note.

3. Review the note.

4. If necessary, return the note for revision by:

   ○ Select your supervisee's name in the Forward To drop down list.

   ○ Enter desired text in the Forward To Note box.

- ○ Click Save.
- ○ Click Exit.

5. To sign the note, click on Line 3 and click Yes to confirm that the note will be locked.

6. Click Exit.

Depending on the settings chosen by your center administrator, it may be possible to forward signed/locked notes in order to teach via example, or consultation between qualified providers.

7.5 Document Prescriptions

If your center's administrator chooses to use the Medication Log (MedLog) feature, you will be assigned rights to as a transcriber or a prescriber. **Support Staff users cannot transcribe medication notes**, because these notes are confidential and Support Staff do not have permission to create/view/edit confidential notes. The prescription information from medication notes is summarized on the MedLog screen accessed via the MedLog icon on the menu bar of the client screen or client file.

This feature is configured by your center administrator.

(Note: The MedLog is not eprescribing. Click here for information about eprescribing.)

What would you like to do?

- ○ Document medicine that a client reports taking
- ○ Document a medicine (prescription/sample) that I'm prescribing
- ○ Document a medicine that our psychiatrist (or doctor/nurse practitioner) is prescribing

Document a Medicine that a Client Reports Taking

1. Open a note:
   - ○ Click the note task on your task list, or
   - ○ Right click on the appointment and click Client Note, or
   - ○ Click on the appointment to open it, and click the Client Note icon on the menu bar, or
   - ○ Open the client file or client screen, click the MedLog icon on the menu bar, and click New Medication Note icon on the menu bar

2. If required, choose a note type that includes the medication tab.

3. Click the medication tab for the note.

4. To add a medication to the note:
    - Click Add > Client Reported Medication.
    - On the prescription pop-up window, add information about the prescription. (Note: Consult with your center administrator if you need instructions (Sigs) or medications that are not on the pre-populated lists.)
    - Click OK.

5. To renew a medication:
    - Click on the medication in the Active medications window.
    - Click Renew > as Client Reported Medication.
    - Make edits on the prescription pop-up window.
    - Click OK.

6. To discontinue a medication:
    - Click on the medication in the Active medications window.
    - Click Discontinue
    - On the pop-up window, choose a reason and date.
    - Click OK.

7. When the medication tab is correct, complete the note as you normally would. (Note: Multiple medications, renewals and discontinues can be documented using a single note, including renewals and discontinued medications.)

Document a Medicine that I'm Prescribing

1. Open a note:
    - Click the note task on your task list, or
    - Right click on the appointment and click Client Note, or
    - Click on the appointment to open it, and click the Client Note icon on the menu bar, or
    - Open the client file or client screen, click the MedLog icon on the menu bar, and click New Medication Note icon on the menu bar

2. If required, choose a note type that includes the medication tab.

3. Click the medication tab for the note.

4. To add a medication to the note:
    - Click Add, and choose Sample Provided or Prescription
    - On the prescription pop-up window, add information about the prescription. (Note: Consult with your center administrator if you need instructions (Sigs) or medications that are not on the pre-populated lists.)

- Click OK.
- Click OK on the acknowledgment.

5. To renew a medication:
    - Click on the medication in the Active medications window.
    - Click Renew > and choose As Sample Provided or As Prescription
    - Make edits on the prescription pop-up window.
    - Click OK.
    - Click OK on the acknowledgment.

6. To discontinue a medication:
    - Click on the medication in the Active medications window.
    - Click Discontinue.
    - On the pop-up window, choose a reason and date.
    - Click OK.

7. When the medication tab is correct, complete the note as you normally would, including signing the note on Line 3. (Note: Multiple medications, renewals and discontinues can be documented using a single note, including renewals and discontinued medications.)

Document a Medicine that is Being Prescribed

1. Open the client screen or client file.

2. Click the MedLog icon on the menu bar.

3. Click the New Medication Note icon on the menu bar.

4. On the pop-up window:
    - Click the Transcribe radio button
    - Choose the prescriber from the pull down list.
    - Enter a note in the text box.
    - Click OK.

5. To add a medication to the note:
    - Click Add, and choose Sample Provided or Prescription
    - On the prescription pop-up window, add information about the prescription. (Note: Consult with your center administrator if you need instructions (Sigs) or medications that are not on the pre-populated lists.)
    - Click OK.
    - Click OK on the acknowledgment.

6. To renew a medication:
   - Click on the medication in the Active medications window.
   - Click Renew > and choose As Sample Provided or As Prescription
   - Make edits on the prescription pop-up window.
   - Click OK.
   - Click OK on the acknowledgment.

7. To discontinue a medication:
   - Click on the medication in the Active medications window.
   - Click Discontinue.
   - On the pop-up window, choose a reason and date.
   - Click OK.

8. As instructed by the prescriber, complete the remainder of the note (narrative, diagnosis, data forms, attachments). (Note: Multiple medications, renewals and discontinues can be documented using a single note, including renewals and discontinued medications.)

9. Click Save.

10. Click Exit.

A task to review/sign the note is added to the prescriber's task list.

7.6 Make Diagnosis

Your center administrator will choose whether to use a diagnosis classification system (e.g. DSM-5 or ICD-10). Depending on how your center administrator has configured Titanium, you may be able to select the diagnosis classification system that you will use for your notes (e.g., DSM-5 or ICD-10). From the calendar screen, click Configuration > User Configuration, and select the desired classification from the pull down menu on the Defaults tab.

1. Add a note as you normally would.

2. Click the Diagnosis tab.

3. To add a new diagnosis:

   - Click Add.

  - On the diagnosis pop-up window, enter the full or partial diagnosis code or search term, and click Find.
  - Click on the desired diagnosis.
  - On the pop-up window, use the pull down menu to select certainty, enter any specifiers, and click OK.

4. To copy a prior diagnosis:
   - Click Copy From.
   - Choose the desired diagnosis from the list. (Note: If a diagnosis was made in a classification system that is different than that being used in the current note, it will not be available to be copied.)
5. To edit a diagnosis, click the item and click View/Edit.
6. To remove a diagnosis, click the item and click Remove.
7. Complete the note as you normally would.

8 Outreach and Non-Clients

Your administrator will choose the definition of "client" to be used in your center (i.e., visited the center, completed intake paperwork, and attended at least one appointment). To track one-on-one interactions with people who are not clients without adding them to your client database, use the non-client note feature in Titanium. Your user and supervisor permissions for non-client notes will be the same as for client notes. If necessary, non-clients can later be converted to clients, and non-client notes placed in the client file. Clients in Titanium cannot be converted to non-clients.

Outreach refers to services provided to individuals or groups who aren't "clients" as defined by your center administrator. Examples might include workshops or lectures to community or campus groups. Outreach activities can be added to your Titanium schedule. Your center administrator may configure Titanium so that outreach activities can be documented for reporting purposes on the Additional Information tab on the outreach appointments.

8.1 Add/Edit/Delete Non-Client Notes

Add a Non-Client Note

1. From the calendar screen
    - ○ Click Open > Non-Client Notes, click the New Non-Client Note button, and enter the non-client information.
    - ○ Click Client, enter the non-client information and choose Non-Client Note from the pull down menu
2. Complete the note as you normally would, including signing and forwarding for signature if required.

Edit an Unlocked Non-Client Note

Unlocked notes are either unsigned, or signed on Lines 1 or 2.

1. From the calendar screen, click Open > Non-Client Notes.
    - ○ Click Open > Non-Client Notes. Enter the non-client information and click Find.
    - ○ Click Client, check "Also Find Non-Client Notes". Enter the non-client information and click Find.
2. Double click to open the non-client note.
3. Edit the note as you normally would.

Edit a Locked Non-Client Note

Locked notes (signed on Line 3) cannot be changed, including information on the narrative and diagnosis tabs, data forms, attachments, and medication tab (if being used). However, addenda can be added to the narrative text.

1. From the calendar screen, click Open > Non-Client Notes.

    - Click Open > Non-Client Notes. Enter the non-client information and click Find.
    - Click Client, check "Also Find Non-Client Notes". Enter the non-client information and click Find.

2. Double click to open the non-client note.

3. Edit the note as you normally would.

Delete a Non-Client Note

Locked notes (signed on Line 3) cannot be deleted.

1. From the calendar screen, click Open > Non-Client Notes.

    - Click Open > Non-Client Notes. Enter the non-client information and click Find.
    - Click Client, check "Also Find Non-Client Notes". Enter the non-client information and click Find.

2. Double click to open the non-client note.

3. Delete the note as you normally would.

8.2 Convert Non-Client to Client

What would you like to do?

- Add a client and place a single non-client note in the client's file
- Add a non-client note to an existing client file

Add a Client and Place a Single Non-Client Note in the Client's File

1. From the calendar screen:
   - Click Open > Non-Client Notes. Enter the non-client information and click Find.
   - Click Client, check "Also Find Non-Client Notes". Enter the non-client information and click Find.

2. Double click to open the non-client note.

3. Click the File icon on the menu bar.

4. Click Yes.

5. Enter the Student ID and press the tab key, or enter the full or partial last name and click Find.

6. If the client is not found, enter the last and first name, and click New Client.

7. Click Yes to confirm.

8. The client screen will open in a new window. Enter information required by your center.

8. Click Save.

9. Click Exit.

Add a Non-Client Note to an Existing Client File

If you don't have sufficient permission to view/edit the client, you may see an error message at Step 7. Additionally, you may be unable to see the non-client note after it has been added to the client file, even if you created the note.

1. From the calendar screen:
   - Click Open > Non-Client Notes. Enter the non-client information and click Find.
   - Click Client, check "Also Find Non-Client Notes". Enter the non-client information and click Find.

2. Double click to open the non-client note.

3. Click the File icon on the menu bar.

4. Click Yes.

5. Enter the Student ID and press the tab key, or enter the full or partial last name and click Find.

6. Double click the client.

7. Click Save.

8. Click Exit.

8.3 Schedule/Document Outreach

To add an outreach activity to your schedule, add an "other" appointment using an outreach appointment code. Be sure to include all users/resources who will be part of the appointment by clicking on the Scheduling tab.

If your center administrator has configured Titanium to capture details of outreach activity:

1. Mark attendance for the users/resources associated with the outreach activity.

2. If not already open, click on the appointment to open it.

3. Click the Edit icon on the menu bar.

4. Click the Additional Information tab. (Note: This is optional, and your center administrator may have chosen to not use this tab to capture outreach information.)

5. Enter the information required by your center administrator (e.g., number attended, service provided to, etc.)

6. Click Save.

7. Click Exit.

9 Printer Settings

When you click the print icon or button on any screen in Titanium, the selection will be sent to your default printer. To set up your default printer:

1. Open the printer setup by:
   - From the calendar screen, click File > Pinter Setup.
   - From the calendar screen, click Reports > Printer Setup. (Note: Depending on your user permissions, you may be unable to access the Reports feature.)
2. Click to select your desired printer from the list. (Note: The list contains printers mapped on your computer. If you do not see your desired printer, use the Windows control panel to locate and add the printer, or contact your IT group for assistance.)
3. Click the Preferences button.
4. On the pop-up window, set desired preferences, and click Ok.
5. Click Ok.

10 Reports

There are a variety of reports in Titanium. The data in the reports can be customized using the filters on the report windows. If your center administrator has given you access, you will be able to view and save reports and/or export raw data create custom reports, charts and graphs. (Note: By default, all users can view and save reports, but only center administrators can export raw data.)

What would you like to do?

○ Generate a report

○ Export data

○ Review report FAQs

○ Review frequently used reports

Generate a Report

1. From the calendar screen, click the Reports icon on the menu bar. (Note: If the icon is grayed out, your center administrator has not given you access to reporting.)

2. Hover over report titles to see previews and locate the report that you want.

3. Click on the desired reported title.

4. Use the options on the pop-up window to set preferences for the report.

5. Click the Preview button. (Note: The formulas used to calculate the report data are shown at the bottom of the first page of the report. Data with similar labels across reports may not be calculated using the same formulas.)

6. Use the menu bar on the report viewer to review, save or print the report.

Export Data

1. From the calendar screen, click the Reports icon on the menu bar.

2. Choose Data Form Statistics, Data Form Statistics by Appointment, or Export Data.

3. Use the pop-up window to set preferences for the data export.

4. Click Export.

5. Use the Windows interface to save the exported data file.

6. Use a third party spreadsheet software like Excel to open the data file, and create desired

reports/charts/graphs.

Reports FAQs

1. *How do I find the report that I need?* Hover over the report title to see a preview.

2. *How do I see the names of clients who were on the report?* For most reports, you can't. However, you can use Advanced Client Search to search for a set of clients. Also, for reports that offer an "export data" option, you can save the report in .xls format to your computer.

3. *How do I run reports for only some Titanium users*? The center administrator can create user and schedule groups in System Configuration. Then choose the desired group from the pull down menu on the report filter screen. The center administrator can also create appointment code groups to aggregate data across appointment codes.

4. *Why are the numbers different on these reports?* If you are looking at two different reports, then calculations may not be the same, even if the labels are. Check the calculation notes in the report to learn how the numbers were calculated. If you ran the same report at two different times, users may have made changes in things like appointment attendance or notes.

5. *The numbers on the report aren't right. Help!* Check the following:

- If using user and schedule or appointment code groups, have your center administrator check the groups to be sure that all users, schedules or appointment codes are included in the groups. When adding or deactivating users or appointment codes, it is easy to overlook updating groups.

- Check the report dates. Dates for semester and year are based on reports settings in system configuration.

- If attempting to compare across reports, check that you are using the same groups, dates, attendance statuses, notes and other filters for both reports.

- Run the Outstanding Tasks report to be sure that all attendance and note-related tasks have been completed.

- Spot check a few client files to be sure that the expected data forms, notes or appointments are actually in the file.

- Review the calculation notes in the report. The report may not be calculated the way that you are calculating other data sources.

Frequently Used Reports

Question or Data	Report
New clients over period of time	Monthly Statistics
Number of hours and types of service	Appointment Statistics
Who was outreach provided to	Services Provided To
Reasons for Treatment	Diagnosis Prevalence
Counselor Caseload	Counselor Case Load
Billing Activity	Revenue Summary
Disability Centers	Disability and Accommodations Reports
Count and Names of Client who meet critera	Advanced Client Search
Responses of Clients Served on Data Form	Data Form Statistics by Appointment Report
Custom charts, graphs, analysis	Export Data

11 Scheduling

The calendar can contain appointments and placeholders. Appointments can be for individual clients, or multiple clients (group/couple). "Other" appointments are those that don't involve clients (i.e., outreach, vacations, staff meetings, etc.). Each of the three appointment types can be scheduled using recurring settings. Hover over items on the screen to see more information. To view an appointment, click on the appointment on the calendar screen.

For ease of use, you can search for open appointment slots or for appointments already scheduled for a client. You can also add a new client in Titanium while in the process of making an appointment. To assist with scheduling, your center administrator may choose to use one or more waitlists. Group sign up sheets can be created to track group members.

For reporting purposes, scheduling appointments includes assigning appointment codes from the list configured by your center administrator. Also attendance status can be marked for each appointment. If your center administrator chooses to use them, appointment reminders can be sent to clients via email (and SMS text if purchased by your center).

Placeholders are used to add information to the schedule without scheduling appointments. For example, placeholders can be used to "pencil in" appointments for clients, or to communicate among staff members, like to indicate working hours for part time users or staff who are on call for certain appointment types like walk ins. Placeholders can also be used like post it notes as reminders to perform tasks.

For user convenience, you can right click on items and empty areas on the schedule to access action menus. Users can drag and drop items on the schedule to edit them. Users can also click and drag items to change their duration.

What does everything on the calendar mean?

Some of the settings on the schedule can be changed by clicking Configure > User Configuration > Schedule Viewer Layout tab.

- **What do the appointment block colors mean?** Appointment and placeholder block colors are configured by your center administrator.

- **What do the icons on the appointment block mean?** Four icons may be displayed on the appointment block: appointment type, comments from the appointment screen, attendance, client flags (if used in your center). Your center administrator will set the default icons to be displayed, and you can alter these settings in user configuration.

- **Why are the days different colors?** By default, Monday's and weekend days are a different color than the rest of the week, but this setting can be changed.

- **Why can't I see weekends?** Your center administrator may choose to not show weekends on the schedule. You can add weekends to your schedule in user configuration.

- **Why can't I see the times when I want to schedule appointments?** Your center administrator sets the default schedule times. You can scroll up or down to set appointments for earlier or later times. You can also set your schedule to view earlier or later daily times in User Configuration.

- **What does the lock icon mean at the top of a schedule?** Either you do not have access to the schedule, or the day you are reviewing is in the past and cannot be changed.

- **Why are there two appointments in a time slot?** Titanium will not prevent scheduling two appointments in a time slot. Users will see a warning message when attempting to schedule appointments that overlap on the schedule, or when scheduling overlapping appointments for a client. By default, appointments shown with strike through font have been canceled, but they can also be displayed in italic font. If you do not want to see canceled appointments, change the setting in User Configuration.

- **How do I see only my schedule?** Right click on the header for your column on the schedule. If you want to see only your schedule by default, change the setting in user configuration.

- **What is a schedule group?** A group of users/resources. These groups can be created by your center administrator or by users with sufficient permission.

- **Why is the schedule blank?** This might occur for a number of reasons including:

    - You're looking at a weekend, or other day/time that has no appointments scheduled.

    - The user group you've chosen has no users.

    - You've chosen to view recurring definitions, placeholders or canceled appointments only, and there aren't any to be displayed. Click View > Normal to return to the default view.

11.1 Add/Edit Appointment

What would you like to do?

- Add an appointment
- Copy an appointment
- Edit an appointment

Note: Your center's administrator has set permissions and rights for schedules. If you do not have sufficient privileges, you may be unable to view, add, edit or delete appointments on any other schedules, or view appointments or information on schedules for other users.

If your center uses supervision features, see the supervision section for information about intern appointments.

Add Appointment

1. On the calendar screen, right click in the time slot/schedule where you want to add the appointment. (Note: By default, weekend days are not displayed but this setting can be changed by your center administrator. To navigate to days not displayed from the calendar screen, click the Go To button on the menu bar and use the calendar pop-up window to select the desired day, or use the arrow navigation icons.)

2. Click Add > type of appointment to be added
   - Individual: One client
   - Group/Couple: Multiple clients
   - Other: Does not involve clients (e.g., outreach, holidays, vacation, staff meetings, etc.)

3. For individual appointments:
   - Enter the Student ID and hit the tab key, or
   - Enter the full or partial last name and click Find. Double click the client from the search list.

4. Enter Appointment Information:
   - For recurring appointments, set the end date for the series or number of appointments to be scheduled.
   - Choose an appointment code.
   - Add location, description and comments as desired. (Note: Do not put confidential information in these fields. Your center administrator may make location a required field for some appointment codes.)

5. If desired, click the Scheduling tab to add other users or resources (e.g. rooms, equipment) so the appointment is added to these schedules.

6. For group appointments, click the Clients tab:
   - Click Add to search for individual clients one at a time, or
   - Choose a group sign up sheet from the pull down menu, and click Copy Members. (Note: It is recommended that the group sign up sheet be copied the day before the appointment to ensure the most current sheet is used. Appointment reminders are based on clients added to the appointment, not the group sign up sheet.)

7. Click Save. (Note: Depending on the settings chosen by your center administrator, you may see prompts to add the appointment to your schedule, that either you or the client has a conflicting appointment, or to assign clients to users on the appointment.)

8. Click Exit.

Copy an Existing Appointment

1. Right click the appointment and choose Copy or Copy to Next Week.

2. Make any desired changes on the appointment screen.

3. Click Save.

4. Click Exit.

Edit Appointment

How do I change the appointment type? You can't switch among individual, group or other appointments after an appointment has been created, or create a recurring appointment from a single instance appointment.

How do I change user, day, time, length? Drag and drop the appointment on the calendar, or click and drag the bottom border of the appointment. if the appointment is on multiple schedules, click to confirm the changes in the dialog box.

How do I change appointment code, client(s), add users/resources?

1. Click the appointment on the schedule, or right click and click Edit..

2. Click Edit on the menu bar.

3. Make desired changes.

4. Click Save.

5. Click Exit.

What does the padlock icon mean on the appointment screen? The appointment is locked or you don't have rights to change it. This may also occur because your center administrator has chosen to not allow appointments in the past to be edited. Contact your center administrator to request changes to locked appointments.

How do I delete an appointment? Deleting appointments will remove them from Titanium, so they will not be included in reports. You should only delete appointments made in error. For cancellations, right click on the attendance code icon on the appointment block and choose the appropriate reason. To delete an appointment made in error, right click on the appointment and click delete. If a note is associated with an appointment, the appointment cannot be deleted without deleting the note first.

11.2 Add/Edit Recurring Appointment

What would you like to do?

- Add recurring appointment definition
- Edit all recurring appointments in the series
- Edit some recurring appointments in the series
- Edit one recurring appointment in the series
- Delete recurring appointments

Titanium automatically creates recurring appointments from the settings created by users. The "recurring appointment definition" refers to the settings that users create. After Titanium has created appointments, those appointments can be changed by editing either the recurring appointment definition or individual appointments in the series.

Add Recurring Appointment Definition

1. On the calendar screen, right click in the time slot/schedule where you want to add the first appointment. (Note: By default, weekend days are not displayed but this setting can be changed by your center administrator. To navigate to days not displayed from the calendar screen, click the Go To button on the menu bar and use the calendar pop-up window to select the desired day, or use the arrow navigation icons.)

2. Click Add > type of appointment to be added
   - Recurring Individual Definition: One client
   - Recurring Group/Couple Definition: Multiple clients
   - Recurring Other Definition: Does not involve clients (e.g., outreach, holidays, vacation, staff meetings, etc.)

3. For recurring individual appointments:
   - Enter the Student ID and hit the tab key, or
   - Enter the full or partial last name and click Find. Double click the client from the search list.

4. Enter Appointment Information:
   - Set the end date for the series or number of appointments to be scheduled.
   - Choose an appointment code.
   - Add location, description and comments as desired. (Note: Do not put confidential information in these fields. Your center administrator may make location a required field for some appointment codes.)

5. If desired, click the Scheduling tab to add other users or resources (e.g. rooms, equipment) so the appointment is added to these schedules.

6. For recurring group appointments, click the Clients tab:
   - ○ Click Add to search for individual clients one at a time, or
   - ○ Choose a group sign up sheet from the pull down menu, and click Copy Members.

7. Click Save.

8. Click Exit.

Edit All Recurring Appointments in Series

1. To edit all appointments in a series:

   ○ Right click on an appointment in the series and click Edit Recurring Series Definition, or

   ○ Double click on an appointment in the series, and click the Recurring icon on the menu bar.

3. Make the desired changes. (Note: Appointment type cannot be changed.)

4. Click Save.

5. Click Exit.

Edit Some Recurring Appointments in Series

To edit only some appointments in a series:

1. Right click on an appointment in the series.

2. Click Split Series Definition.

3. Click Yes.

4. Right click on the appointment.

5. Click Edit Recurring Series Definition.

6. Make desired changes. (Note: Appointment type cannot be changed.)

7. Click Save.

8. Click Exit.

Edit A Single Recurring Appointment

1. Click the appointment on the schedule, or right click and click Edit.

2. Click Edit on the menu bar.

3. Make desired changes. (Note: Appointment type cannot be changed.)

4. Click Save.

5. Click Exit.

Delete Recurring Appointments

Deleting appointments will remove them from Titanium, so they will not be included in reports. You should only delete appointments made in error. To delete appointments made in error:

1. Right click on the appointment.

2. Click Delete.

3. On the pop up window, choose whether to delete the current appointment, all appointments in the series, or only appointments after a certain date.

4. Click Ok.

5. Click Exit.

11.3 Appointment Reminders

The appointment reminder feature is optional. If your center administrator chooses to use this feature, they will assign some users rights to use the appointment reminder function. Only the center administrator can edit email/text messages. This feature is configured by your center administrator.

Appointment reminders are automated, but cannot be set to be sent automatically. They must be sent by a Titanium user.

Your center may have purchased the ability to send reminders via SMS text message. Each reminder sent via text will incur a charge. To view your credit balance, from the calendar screen, click Open > Client Appointment Reminders. The remaining balance is in the lower left corner. Your center administrator should visit our website to add credit to the SMS text account. If a center exceeds their credit, they will not be allowed to send SMS text messages.

Clients can stop receiving text messages by replying STOP, UNSUBSCRIBE, CANCEL OR QUIT. Clients can resume receiving text messages by replying START or YES. Other responses will not be received or processed. Client responses do not affect any "ok to contact" settings on the client contact tab of the client screen.

What would you like to do?

- Send bulk reminders
- Send single reminder
- Resend bulk reminders
- View sent reminders

Send Bulk Reminders

Note: Reminders must be sent a minimum of one hour in advance of the scheduled appointment time.

1. From the calendar screen, click Open > Client Appointment Reminders.

2. Set the desired search preferences. (Note: You can search from 1-10 calendar days in the future.)

3. Click Search on the menu bar.

4. Edit clients with no set reminder preferences by:
    - Click to select the client in the list, and click the Client icon on the menu bar to edit the client screen.
    - Click View/Modify Reminder Preferences for Clients (Note: If your center uses both SMS text and email, and clients have information and permission for both, then reminders will be sent using both methods.)
        - Click Edit on the menu bar
        - Use the pull down menus and text fields to enter client reminder preferences and information
        - Click Save.
        - Click Exit.

5. Click Send Reminders on the menu bar.

6. Review the summary results to view the reminders that were sent/process. Click Ok.

7. Click Exit.

(Note: If you receive an error message that you have exceeded your SMS text credit limit, contact your center administrator. Your center must pay for additional text messages before more reminders can be sent via text message. The amount of credit remaining on your account is shown in red text in the lower, left corner of the appointment reminder screen.)

Send Single Reminder

Depending on the settings chosen by your center administrator, you may be able to send single reminders for specific appointments, instead of reminders to all clients. To send a single reminder, navigate to the appointment and click Send Reminder on the menu bar.

Resend Bulk Reminders

If you want to send multiple bulk reminders about a single appointment, you must reset the reminder:

1. From the calendar screen, click Open > Client Appointment Reminders.

2. To see the most recent reminder sent, set the filters.

3. Uncheck the box in the upper right corner for hide results for reminders already sent.

4. Click Search on the menu bar.

5. Click on the client for whom you want to reset the reminder.

6. Click the Reset Status button on the menu bar.

7. Use the pull down menu to choose whether to reset the email, SMS text or both reminders for the selected client/appointment.

8. Repeat steps 5-7 for all desired clients.

9. Send reminders as you normally would.

View Sent Reminders

You can view the reminders that have already been sent by:

1. From the calendar screen, click Open > Client Appointment Reminders.

2. To see the most recent reminder sent, click History on the menu bar. Set the filters and click Search.

3. Click Search on the menu bar.

4. To view the email or text reminder, click the desired line, and click View Email or View SMS from the menu bar.

11.4 Search for Appointment

How do I find scheduled appointments for a client? From the calendar screen, click Find on the tool bar. Search for the client.

How do I find open appointment slots? From the calendar screen, click Find Open on the tool bar, and enter search criteria. If searches have been saved, use the pull down menu to select a prior search. Double click on any entry to be redirected to the appointment on the schedule. (Note: To search for all available openings, set schedules and appointment type search filters to Group: All.)

If you frequently perform the same search, you can save your search by:

1. Set search filters.

2. Select Manage Saved Searches to save settings for your own future searches. (Note: Center administrators can save searches to be used by all staff.)

3. On the pop-up window, click Edit on the menu bar and enter a name for the search. (Note: You can also delete searches that are no longer required by selecting the search from the list, and clicking Delete on the menu bar.)

4. Click Save.

5. Click Exit.

11.5 Groups

Group sign up sheets allow you to create a list of planned groups and workshops, and maintain the client roster for each group. They also allow you to efficiently add clients to appointments for large groups who will have appointments regularly over a period of time. Group sign up sheets can be printed, if desired. Printed sheets include email addresses and phone numbers for clients who have approved being contacted via these methods. If your center users supervision features, see the Supervision section for information about intern groups.

What would you like to do?

- ○ Create a group sign up sheet
- ○ Edit a group sign up sheet
- ○ Use a group sign up sheet to set a group appointment

Create a Group Sign Up Sheet

1. From the calendar screen, click Open > Group Sign Up Sheets.

2. Click New Group Sign Up Sheet.

3. On the Group Information tab, enter information about the group (name, status, code, users, group size, etc.).

4. On the Group Member Sign Up tab, add group members by:

   - ○ Click Add.
   - ○ Search for the client.
   - ○ Click OK.
   - ○ Continue adding members as desired.

5. Click Save.

6. Click Exit.

Edit a Group Sign Up Sheet

1. From the calendar screen, click Open > Group Sign Up Sheets.

2. Double click on a sign up sheet to open it.

3. Click the Edit icon on the menu bar.

4. Make desired changes.

5. Click Save.

6. Click Exit.

Delete a Group Sign Up Sheet

1. From the calendar screen, click Open > Group Sign Up Sheets.

2. Double click on a sign up sheet to open it.

3. Click the Delete icon on the menu bar.

4. Type in "DELETE THIS CLIENT GROUP" and click the Delete Client Group button.

5. Click Exit.

11.6 Mark Attendance

Your center administrator may have configured Titanium to automatically mark all "other" appointment types as "attended."

Mark Attendance from the Calendar Screen

1. If displayed on the appointment block, click on the attendance icon shown on the appointment block, and choose the desired status from the menu, or

2. Right click on the appointment block, click Attendance, and choose the desired status.

3. If the appointment is on multiple schedules, on the pop up window, choose whether to mark attendance on all schedules or only the schedule from which the appointment was accessed.

Mark Attendance for a Group Appointment from the Calendar Screen

1. If displayed on the appointment block, click the attendance icon, or right click on the appointment block to click Attendance.

2. Choose the desired status from the menu.

3. On the pop-up warning box, click to confirm the desired status for all users and attendees. (Note: If all users and attendees do not have the same status, you must mark attendance from the appointment screen.)

Mark Attendance from the Appointment Screen

1. Click on the appointment block to open the appointment screen.

2. Click the Edit icon on the menu bar

3. For an individual appointment with one user, use the pull down menu to change the status from Scheduled to the desired status.

4. If there are multiple users assigned to the appointment:

    - Click the Scheduling tab
    - Click All Attendance and choose the desired status and/or
    - Use the pull down menus to mark attendance for each resource

5. For group appointments:

    - Click the Clients tab
    - Click All Attendance and choose the desired status
    - Use the pull down menus to set the attendance for each client

6. Click Save.

7. Click Exit.

11.7 Placeholders

What would you like to do?

- Schedule a placeholder
- Edit a placeholder
- Schedule an appointment based on a placeholder

Schedule a Placeholder

1. On the calendar screen, right click in the time slot/schedule where you want to add the placeholder

2. Click Add > Placeholder for
   - Individual: One client
   - Group/Couple: Multiple clients
   - Other: Does not involve clients (e.g., outreach, vacation, staff meetings, etc.)
   - Online appointment scheduling: If configured by your center administrator, marks times to be displayed to clients when scheduling online

3. Enter placholder Information:
   - Set the end date for the series or number of placeholders to be scheduled.
   - Choose an appointment code
   - Add location, description and comments as desired.

4. If desired, associate client(s) with placeholder by:
   - Individual: Click Select Client and search for the client as you normally would
   - Group: Click the Clients tab and click Add to search for individual clients or choose a group sign up sheet and click Copy Members

5. If desired, change the display to Duplicate Header on Every Line to display the appointment code repeatedly on the block.

6. If desired, click the Scheduling tab to add other users or resources (e.g. rooms, equipment) so the placeholder is added to these schedules.

7. Click Save.

8. Click Exit.

Edit a Placeholder

If the start date for the series has passed, the prior placeholders cannot be edited. Instead, right click to split the series and edit the remaining placeholders. To split every placeholder in the series, right click on the placeholder and choose Create Separate Placeholders from Series.

How do I change the placeholder type? Placeholder type (individual, group, other) cannot be changed after the placeholder has been created.

How do I change user, day, time, length? Drag and drop the placeholder on the calendar, or click and drag the bottom border of the placeholder. If the placeholder is on multiple schedules, click to confirm the changes in the dialog box.

How do I change appointment code, client(s), add users/resources?

1. Click the placeholder on the schedule.

2. Click Edit on the menu bar.

3. Make desired changes.

4. Click Save.

5. Click Exit.

What does the padlock icon mean on the placeholder screen? The placeholder is locked or you don't have rights to change it.

How do I delete a placeholder? Right click on the placeholder and click delete. Click to select to delete just the selected placeholder, or only future placeholders. Use the calendar pull down to select future placeholders to be deleted.

11.8 Schedule Groups

The center administrator can create users schedule groups to serve several purposes including:

- View only a subset of schedules (i.e., senior staff, interns reporting to a given supervisor, resources, rooms, staff working at different campus locations, etc.)
- Filter for openings for appointments
- Filter and summarize data for reports
- Filter for advanced client search

Users with sufficient permission can create their own users and schedules groups. These groups can be used only to restrict views to a subset of schedules. Groups created by users cannot be used for reporting purposes or by other users.

What would you like to do?

- ○ Create a group
- ○ Manage saved groups

Create a Group

1. From the calendar screen, click the Schedules pull down menu and choose Create/Manage Your Groups.
2. Use the list screen to add users/schedules to the group. To add all of the group members of an existing users and schedules group created, click Add Members from Group and choose the desired group.
3. Click the check box "Set Number of Columns Displayed to Match Selected Schedule Count" to stretch or shrink the schedule screen when all group members are shown.
4. Click the Active check box to make the group active or inactive.
5. To save the group for future use, click the check box. Type the name of the group in the Description box. (Note: If you only need the group once, click Ok to display the group members chosen).
6. Repeat Steps 2 - 5 for all desired groups.
7. Click Save.
8. Click Exit.

Manage Saved Groups

1. From the calendar screen, click the Schedules pull down menu and choose Create/Manage Your Groups.

2. Click the Manage Your Groups button.

3. Use the list screen to edit or delete list items.

4. Click Save.

5. Click Exit.

6. Click Ok.

11.9 Using Online Scheduling

Your center administrator may choose to configure online appointment scheduling, if your center uses the optional web component feature. To use the feature:

1. Add online appointment scheduling placeholders to desired schedules. These will be the days/times/schedules displayed to clients to select slots.

2. Direct clients who want to use online scheduling to your center's web component URL. (Note: Your center administrator may have configured several options for online scheduling, and should provide instructions for use.)

3. After clients select appointment slots, a locked appointment block will be placed on the schedule. The appointment may not be edited or deleted until after it has been approved. The appointment block will be marked with a yellow and black U icon. (Note: If a user is authorized to approve incoming data and attempts to edit a locked appointment, they can click "yes" on the prompt to open the Approve Incoming Data screen.)

4. After the Approve Incoming Data process has been run, the appointment block will be unlocked. (Note: At the bottom of the appointment screen, added by Client will appear to show that the appointment was scheduled online.)

11.10 Waitlist

Your center administrator may choose to use one or more waitlists. You should check with your center administrator to learn about your permissions for waitlists (view only, add clients, manage lists or none). This feature is configured by your center administrator.

What do you want to do?

- See if the client is on the waitlist
- Add a client to the waitlist
- Edit a waitlist entry
- Manage the waitlist
- Re-open a waitlist entry

See if a Client is on the Waitlist

The waitlist icon appears on multiple screens in Titanium (e.g. client screen, client file, appointment, etc.). If the waitlist icon is green, the client is entered on a waitlist. If there is more than one center waitlist, click the icon to open the waitlist entry window and double click the entry in the Waitlists Client is Already On to view the entry.

Add a Client to the Waitlist

1. Click the waitlist icon on any screen for the client. (Note: Users can also click Open > Waitlist Management, and click the New icon on the menu bar.)

2. Use the pull down menu to select the desired list.

2. Click the Add to Selected Waitlist button.

3. Complete the entries on the waitlist pop-up window as required by your center's administrator.

4. Click Save.

5. Click Exit.

Edit a Waitlist Entry

Unless you are designated as a waitlist manager, you are only able to edit entries that you created within 24 hours after you create them.

1. Click the waitlist icon on any screen for the client.

2. Click Open Existing Waitlist Entry.

If it has been less than 24 hours since the waitlist entry was added by a user with "add" permission:

3. Click Edit.

4. Make desired changes.

If it has been longer than 24 hours since the waitlist entry was added by a user with "add" permission:

5. Click New Line above the notes box to add notes to the entry or click in the note box to add a note. (Note: Your center administrator may have disabled this option.)

6. Click Save.

7. Click Exit.

Manage the Waitlist

1. From the calendar screen, click Open > Waitlist Management

2. Use the pull down menus on the Listing tab of the waitlist management screen to change the waitlist entries that are displayed. (Note: Your center administrator may have chosen a cut off date so that older entries are not displayed.)

3. Double click an entry on the waitlist to view the waitlist details tab for the entry.

4. Click Edit on the menu bar.

5. Edit information on the waitlist details tab.

6. Click Mark Complete to remove an entry from the waitlist.

7. Click Save.

8. Depending on the settings chosen by your center administrator, click the Completion Note button to create a note in the client file. Complete the note as you normally would.

9. Click the Listing tab to view other entries.

Re-Open a Waitlist Entry

1. From the calendar screen, click Open > Waitlist Management

2. Use the pull down menus on the Listing tab of the waitlist management screen to view Completed waitlist entries. (Note: Your center administrator will set the date after which completed entries can no longer be viewed.)

3. Double click an entry on the waitlist to view the waitlist details tab for the entry.

4. Click Edit on the menu bar.

5. Click Re-Open.

6. Enter a reason in the pop-up window.

7. Click OK.

8. Click Save.

12 Supervision

Titanium contains features that allow teaching or training clinics to create appointments, records and files for their interns. These features allow information about programs to be kept separate from information about clients. Your center administrator may choose to activate and configure these features for use in your center.

Many of the features available in intern screens and files are similar to those in client screens/ files, and function in the same way. For those features, links will be provided to the instructions in the client sections of the help/manual.

By default, Titanium displays the term "intern." All instructions and documentation use this term. Your center administrator may change this term as desired (i.e., trainee, supervisee, student clinician, etc.) and all displays in Titanium will be changed. Your center administrator has configured the appointments, notes, data forms, and screens for interns.

Note that all interns must be users in Titanium. Intern records/files do not affect the user's settings, which are controlled by the system administrator via system configuration.

What would you like to do?

- ○ Add/edit/delete intern record
- ○ Search for interns
- ○ Add/edit intern appointment
- ○ Add/edit/delete intern notes
- ○ Review intern assignments and data

12.1 Add/Edit/Delete Intern

What would you like to do?

- ○ Add an intern record
- ○ Edit an intern record
- ○ Deactivate an intern record
- ○ Delete an intern record

Note that all interns must be users in Titanium. Intern records/files do not affect on the user's settings, which are controlled by the system administrator via system configuration.

Add an Intern Record

Intern files can only be created by system administrators. You should contact your center administrator for assistance.

By default, intern files are restricted to only assigned users and interns are assigned to their own files. After an intern record has been added, the supervisor added to the security tab of the intern file can remove the intern from the security tab and change the file access.

Your center administrator can restrict access to intern records and files to only assigned users, even if user security settings would normally allow access. You should consult with your center administrator regarding settings.

Edit an Intern Record

If you are not assigned to an intern record, you may not have rights to edit the intern record.

1. Navigate to intern screen from:
    - ○ Any screen that has Intern icon on the menu bar (e.g., appointment screen, My Interns list)
    - ○ From the calendar screen, click Open > Interns and double click on the intern.
2. Click Edit on the menu bar on the intern screen.
3. Add or change information as required.
4. Click Save.

Deactivate an Intern Record

Deactivating the intern file will not affect the intern's ability to log into or use Titanium. User settings must be changed by the system administrator in configuration. To deactivate interns:

1. Navigate to intern screen from:
    - ○ Any screen that has Intern icon on the menu bar (e.g., appointment screen, My Interns list)
    - ○ From the calendar screen, click Open > Interns and double click on the intern.
2. Click the Edit icon on the menu bar on the intern screen.
3. Click in the Active box.
4. Click Save.

5. Click Exit.

Delete an Intern Record

You can delete an intern record if you have sufficient permission, and no notes or appointments have been added to the file. It is recommended that intern records be deactivated instead of deleted. Intern records cannot be deleted if their files contain notes or appointments. Unless you are a system administrator, each note and appointment must be deleted individually before the intern record can be deleted. (Note: Deleting an intern record will not affect the intern's ability to log in or use Titanium. User settings must be changed by the system administrator in configuration).

To delete an intern:

1. Navigate to the intern screen from:
   - Any screen that has Intern icon on the menu bar (e.g., appointment screen, My Interns list)
   - From the calendar screen, click Open > Interns and double click on the intern.
2. Click Delete on the menu bar on the Intern screen.
3. Click Yes to confirm.

12.2 Add/Edit Intern Appointment

Your center's administrator has configured appointment codes to be used for meetings between supervisors and interns, or groups of interns for things like case presentations or program meetings. The appointments created using these codes will be automatically placed on the Titanium schedules of the supervisor and all interns added to the appointment. Appointment information will be added to the files of the interns. When creating intern appointments, only the codes designated by your center administrator as intern codes will be available. (Note: Attendance for intern appointments is marked in the same way as for client appointments.)

What would you like to do?

- Add an appointment
- Copy an appointment
- Edit an appointment

Note: Your center's administrator has set permissions and rights for schedules. If you do not have sufficient privileges, you may be unable to view, add, edit or delete appointments on any other schedules, or view appointments or information on schedules for other users.

Add Appointment

1. On the calendar screen, right click in the time slot of the supervisor schedule where you want to add the appointment.

2. Click Add > Intern Appointment > type of appointment to be added.
   - ○ Individual: One intern
   - ○ Group: Multiple interns

3. Add interns to the appointment:
   - ○ For individual appointments, double click the intern from the list.
   - ○ For group appointments, click the Interns tab:
     - ▪ Click Add to choose individual interns one at a time, or
     - ▪ Choose an intern group sign up sheet from the pull down menu, and click Copy Members.

4. Enter Appointment Information:
   - ○ Choose an intern appointment code.
   - ○ Add location, description and comments as desired. (Note: Do not put confidential information in these fields.)

5. If desired, click the Scheduling tab to add other users or resources (e.g. rooms, equipment) so the appointment is added to these schedules. (Note: Do NOT add the intern to the scheduling tab. The appointment will automatically be added to the intern's schedule in Titanium.)

6. Click Save.

7. Click Exit.

Copy an Existing Appointment

1. Right click the appointment and choose Copy or Copy to Next Week.

2. Make any desired changes on the appointment screen.

3. Click Save.

4. Click Exit.

Edit Appointment

How do I change the appointment type? You can't switch among individual, group or other appointments after an appointment has been created, or create a recurring appointment from a single instance appointment.

How do I change user, day, time, length? Drag and drop the appointment on the calendar, or click and drag the bottom border of the appointment. if the appointment is on multiple schedules, click to confirm the changes in the dialog box.

How do I change appointment code, intern, add users/resources?

1. Click the appointment on the schedule.

2. Click Edit on the menu bar.

3. Make desired changes.

4. Click Save.

5. Click Exit.

What does the padlock icon mean on the appointment screen? The appointment is locked or you don't have rights to change it. This may also occur because your center administrator has chosen to not allow appointments in the past to be edited. Contact your center administrator to request changes to locked appointments.

How do I delete an appointment? Deleting appointments will remove them from Titanium, so they will not be included in reports. So, you should only delete appointments made in error. For cancellations, right click on the attendance code icon on the appointment block and choose the appropriate reason. To delete an appointment made in error, right click on the appointment and click delete. If a note is associated with an appointment, the appointment cannot be deleted without deleting the note first.

12.3 Add/Edit Recurring Intern Appointment

What would you like to do?

- Add recurring appointment definition
- Edit all recurring appointments in the series
- Edit some recurring appointments in the series
- Edit one recurring appointment in the series
- Delete recurring appointments

Titanium automatically creates recurring appointments from the settings created by users. The "recurring appointment definition" refers to the settings that users create. After Titanium has created appointments, those appointments can be changed by editing either the recurring appointment definition or individual appointments in the series.

Add Recurring Appointment Definition

1. On the calendar screen, right click in the time slot/schedule where you want to add the first appointment. (Note: By default, weekend days are not displayed but this setting can be changed by your center administrator. To navigate to days not displayed from the calendar screen, click the Go To button on the menu bar and use the calendar pop-up window to select the desired day, or use the arrow navigation icons.)

2. Click Add > type of appointment to be added
    - Recurring Intern Individual Definition: One intern
    - Recurring Intern Group Definition: Multiple interns

3. For recurring individual appointments, click the intern from the list

4. Enter Appointment Information:
    - Set the end date for the series or number of appointments to be scheduled.
    - Choose an appointment code.
    - Add location, description and comments as desired. (Note: Do not put confidential information in these fields. Your center administrator may make location a required field for some appointment codes.)

5. If desired, click the Scheduling tab to add other users or resources (e.g. rooms, equipment) so the appointment is added to these schedules.

6. For recurring group appointments, click the Interns tab:
    - Click Add to search for individual interns one at a time, or
    - Choose a group sign up sheet from the pull down menu, and click Copy Members.

7. Click Save.

8. Click Exit.

Edit All Recurring Appointments in Series

1. To edit all appointments in a series:

    - Right click on an appointment in the series and click Edit Recurring Series Definition, or

    - Double click on an appointment in the series, and click the Recurring icon on the menu bar.

3. Make the desired changes. (Note: Appointment type cannot be changed.)
4. Click Save.
5. Click Exit.

Edit Some Recurring Appointments in Series

To edit only some appointments in a series:

1. Right click on an appointment in the series.
2. Click Split Series Definition.
3. Click Yes.
4. Right click on the appointment.
5. Click Edit Recurring Series Definition.
6. Make desired changes. (Note: Appointment type cannot be changed.)
7. Click Save.
8. Click Exit.

Edit A Single Recurring Appointment

1. Click the appointment on the schedule, or right click and click Edit.
2. Click Edit on the menu bar.
3. Make desired changes. (Note: Appointment type cannot be changed.)
4. Click Save.
5. Click Exit.

Delete Recurring Appointments

Deleting appointments will remove them from Titanium, so they will not be included in reports. You should only delete appointments made in error. To delete appointments made in error:

1. Right click on the appointment.

2. Click Delete.

3. On the pop up window, choose whether to delete the current appointment, all appointments in the series, or only appointments after a certain date.

4. Click Ok.

5. Click Exit.

12.4 Intern Groups

Intern group sign up sheets allow you to easily populate intern group appointments and create rosters.

What would you like to do?

- Create an intern group
- Edit an intern group

Create a Group Sign Up Sheet

1. From the calendar screen, click Open > Intern Group Sign Up Sheets.

2. Click New Group Sign Up Sheet.

3. On the Group Information tab, enter information about the group (name, status, code, users, group size, etc.).

4. On the Group Member Sign Up tab, add group members by clicking on interns from the list.

5. Click Save.

6. Click Exit.

Edit a Group Sign Up Sheet

1. From the calendar screen, click Open > Intern Group Sign Up Sheets.

2. Double click on a sign up sheet to open it.

3. Click the Edit icon on the menu bar.

4. Make desired changes.

5. Click Save.

6. Click Exit.

12.5 Intern Attendance

Mark Attendance from the Calendar Screen

1. If displayed on the appointment block, click on the attendance icon shown on the appointment block, and choose the desired status from the menu, or

2. Right click on the appointment block, click Attendance, and choose the desired status.

3. On the pop up window, choose whether to mark attendance on all schedules or only the schedule from which the appointment was accessed.

Mark Attendance for a Group Appointment from the Calendar Screen

1. If displayed on the appointment block, click the attendance icon, or right click on the appointment block to click Attendance.

2. Choose the desired status from the menu.

3. On the pop-up warning box, click to confirm the desired status for all users and attendees. (Note: If all users and attendees do not have the same status, you must mark attendance from the appointment screen.)

Mark Attendance from the Appointment Screen

1. Click on the appointment block to open the appointment screen.

2. Click the Edit icon on the menu bar

3. Click the Scheduling tab

4. Click All Attendance and choose the desired status or use the pull down menus to mark attendance for each resource

5. For group appointments:

   - Click the Interns tab
   - Click All Attendance and choose the desired status
   - Use the pull down menus to set the attendance for each intern

6. Click Save.

7. Click Exit.

12.6 Add/Edit/Delete Intern Notes

The purpose of intern notes is to record information about the intern's training and program progress, as part of the supervision process. Notes about client sessions/treatment should be created in client files.

Your center administrator has created note types and data forms specifically for use in intern files. The only notes and data forms that can be added to intern files are those designated by your center administrator as intern notes and data forms.

Your user and supervisor permission levels will affect the notes that you can create, sign, view and edit.

Notes can include the following sections:

- Narrative (information entered in the narrative is not searchable/reportable)
- Data forms (i.e., assessments, checklists, intake forms, etc. used to capture searchable/reportable data)
- Attachments

What would you like to do?

- Add a note
- Edit an unlocked note

- Edit a locked note
- Add an intern group note
- Add intern note to distributed group note
- Delete a note

Add a Note

You do not have to complete notes all at once. Click Save and Exit to save your note. Open the note and click Edit to continue writing. Titanium creates note back ups periodically, and back ups can be recovered in the event of system failure.

1. To open a note:
    - Right click on the intern appointment and click Note, or
    - Click on the appointment to open it, and click the Note icon on the menu bar, or
    - Open the intern file, click the New Note icon on the menu bar, and click Yes to confirm that you are creating a note not related to an appointment
2. On the Narrative tab, choose the note type from the pull down menu.
3. Complete the note narrative.
    - Date and time automatically populate. Use the controls to make desired changes. (Note: Your center administrator may choose to not display note date and time.)
    - Enter desired information in the text box on the Narrative tab.
    - If desired, right click to choose a note template (outline created by your center's administrator).
    - If desired, right click to open to full screen view or use the spell check function. (Note: Users can click Options on the Spell Check tab to change the color used to indicate misspelled words. Titanium will retain the user settings. This is useful for users who are red/green color blind.)
4. To review or copy/paste narrative text from prior notes:
    - Click the Save icon on the menu bar.
    - Click Navigate.
    - Choose the desired note to review.
    - Highlight the desired text and press Ctrl + C on your keyboard

  - Click Navigate to return to the current note.
  - Click in the narrative text box, and press Ctrl + V on your keyboard (or right click and choose Paste from the menu).

5. If desired, add a data form:
   - Click on the data forms icon on the menu bar
   - Use the pull down menu to select the desired form
   - Complete the data form.
     - Enter the desired information on the form.
     - Update prior data form:
       - Click Copy on the menu bar.
       - Hover over "Copy Data From Previously Entered Data Form." (Note: Data entered on one form cannot be copied to a different form, only to a new instance of the same data form.)
       - Click to select the prior version.
       - Edit the desired information on the new data form.
   - Click Save.
   - Click Exit.
6. If desired, click the Attach icon on the menu bar and add an attachment.
   - Click the Attach icon on the note menu bar.
   - Click Attach a File.
   - Use the Windows interface on your computer to locate the file to be attached. (Note: File size is limited to 16 mb.)
   - Click the file to select it and click Open.
   - Use the pull down menu to select a description, or type in a description of the file.
   - Repeat steps to add as many attachments as desired.
   - Click Close to return to the note.
7. On the narrative tab, click the highest number available to you to sign the note. If you signed on Line 3, click Yes to confirm that you want to lock the note.
8. If you signed on Line 1 or 2, forward the note for review:

- If necessary, use the pull down menu to select the reviewer.
- If desired, add a Forward To message.

10. Click Save.
11. Click Exit.

Edit an Unlocked Note

Unlocked notes are either unsigned, or signed on Lines 1 or 2.

1. From the intern file or appointment, open the note.
2. Click the Edit icon on the menu bar.
3. If the note has been signed on Line 1 or 2, the user who signed the note must click to remove their signature.
4. Make desired changes.
5. Sign the note as you normally would, including forwarding the note for signature.

Edit a Locked Note

Locked notes (signed on Line 3) cannot be changed by users, including information on the narrative tab, data forms, and attachments (if being used). However, addenda can be added to the narrative text.

1. From the intern file or appointment, open the note.
2. Click the Edit icon on the menu bar.
3. Click Addendum on the menu bar.
4. Type the desired narrative in the addendum. The addendum text box has the same functionality as the note narrative text box.
5. Sign the addendum in the same way that you sign notes, including forwarding for signature.

Add a group note

1. Open the group appointment screen by clicking on the group appointment on the calendar screen.
2. If it has not already been done, mark attendance for the appointment.
3. Click the Group Note icon on the menu bar.
4. Create and sign the note as you normally would.
5. After the note has been signed on Line 3 and saved, click the Distribute icon on the group note menu bar.
6. On the pop-up box, click a button to select the client files to which to distribute the group note.
7. Click OK to confirm.

Add an Intern Note Related to a Group Note

1. Open the group note in the intern's file by:
    - Click on the interns tab in the group appointment screen, select the desired intern and click the Intern Note button or
    - Open the intern's file and click on the group note inside the intern's file.
2. Click the Edit icon on the menu bar.
3. Click the Addendum icon on the menu bar.
4. Add an addendum to edit the note as you normally would.

Delete a Note

Locked notes (signed on Line 3) cannot be deleted.

1. From the intern file or appointment, open the unlocked note.
2. If the note has been signed on Line 1 or 2, the user who signed the note must click to remove their signature.
3. Click the Delete icon on the menu bar.
4. Click Yes to confirm.

12.7 My Interns List

The My Interns list provides the user currently logged into Titanium with their personal list of interns assigned to them. To open your My Interns list, from the calendar screen, click Open > My Interns.

Intern Statistics

The screen also provides statistics for your interns, and access to the intern screen and intern file:

- Next Appt: This is the date of the next intern appointment with the supervisor
- # Clients: This is the number of clients to whom the intern has been assigned as a user on the client security tab (e.g., count of clients on the intern's My Clients list)
- # Attended Appts Year: This is the number of client appointments the intern has attended during the year. (Note: Dates that define the year are set by the center administrator in system configuration.)
- # Hours Attended Year: This is the amount of time that the intern has attended client appointments during the year. (Note: Dates that define the year are set by the center administrator in system configuration.)

Right click on the column headers for options to sort, rearrange columns, choose columns or save/export the table.

Intern Search

If you have been given permission as a supervisor, you can view another user's My Interns list by selecting their name from the pull down menu.

Because creating an intern requires at least one supervisor and interns are automatically assigned to their own record, it should be rare for any intern to be unassigned to a user in Titanium. Settings to locate unassigned interns, all active interns, and all interns are shown below:

Unassigned, active interns:
- Show interns for: All
- Include interns that are: Active
- Include interns with users that are: Not assigned

All active interns:

- Show interns for: All
- Include interns that are: Active
- Include interns with users that are: Actively assigned, inactively assigned, not assigned

All interns:

- Show interns for: All
- Include interns that are: Active, inactive
- Include interns with users that are: Actively assigned, inactively assigned, not assigned

12.8 Search for Intern

My Interns list

1. On the calendar screen, click Open > My Interns

2. The list will default to your interns.

3. If you have permission as a supervisor, use the pull down menu to change the user for interns assigned to other users.

Single Intern Search

1. From the calendar screen, click Open > Interns

2. Double click on the desired intern from the list.

13 Task List

Your center's administrator has established a set of required record keeping activities related to appointments. Depending on the settings chosen by your center administrator, there may also be termination or client deactivation tasks for the center. The task list shows the activities that users should complete and provides a single window from which to work.

Users cannot add items to the task list. Instead, consider using placeholders as "post-it" notes on the schedule as reminders to complete tasks. The only way to remove an item from your task list is to complete it. When a task is completed, it will automatically be removed from the task list. Depending on your permissions and settings in Titanium, you can remove tasks to sign notes by double clicking the task list item, and choosing another user in the Forward To: section of the note, and clicking Save and Exit.

Complete Items on the Task List

1. From the calendar screen, click Open > Task List.

2. Review the item on the task list to determine what needs to be done. (Note: Your center administrator may choose to use a color coding scheme to indicate the number of days since the task was added to the list. You should ask your center administrator the meaning of color highlights seen on this screen.)

3. Double click the item on the task list to open the screen where you need to complete the task. (Note: You can only complete one task at a time.)

4. Complete the required action (e.g. mark attendance, add a note, sign a note), or respond to the prompts.

5. Close the screen to return to the task list.

Monitor my Supervisee's Task List

If you have been given permission as a supervisor, you can view another user's task list by selecting their name from the pull down menu.

14 User Configuration

Your center's administrator has configured Titanium with default settings, menus and options. You are able to override some of those settings to personalize Titanium displays and functions. The settings that you choose are linked to your user account, so they'll only apply when you are logged in. Options for each of the user configuration tabs are shown below.

To configure settings:

1. From the calendar screen, click Configure > User Configuration.
2. On the tabs, use the pull down menus, check boxes and text boxes to set desired options.
3. Click:
   - Apply to see the effects of your changes
   - OK to save changes and exit configuration
   - Cancel to exit configuration without saving changes

14.1 User Defaults Tab

Defaults

1. Use the pull down menu to select the default users and schedules group for which reports will be generated.
2. Use the pull down menu to select the default user or schedule for which reports will be generated.
3. Use the pull down menu to select the user to whom notes will be forwarded by default.
4. User the pull down menu to change the default diagnostic code set for your notes, if available.
5. If your center administrator has implemented termination features, use the spinner to increase the number of days between last appointment and the generation of termination tasks.
6. Enter how frequently notes will be saved when you are creating them. (Note: This will provide a back up in the event of computer failure, so that notes can be recovered.)
7. Click in the check box to display a screen showing the number of tasks on your task list after log in.
8. Click in the check box to turn on a prompt when making individual appointments for other users to add the appointment to your schedule as well.
9. To change your password, click log in account status and change the password button.
   - Click change password.

- Enter your new password twice and click OK. (Note: Titanium requires strong passwords of 8-32 characters, containing at least one upper case and one lower case letter and a number. Your center administrator may require use of symbols. Passwords cannot be reused until 50 password changes have occurred.)
- Click save

(Note: Titanium Support is **unable** to log onto your Titanium application, if passwords are forgotten. We **cannot** reset passwords. If you are locked out of Titanium, contact your center administrator for assistance.)

10. Click the Reset your spell check dictionary to default button to remove anything that you added to the spell check dictionary. (Spell check is based on the regional and language settings chosen in Windows. The default is US English.)

11. If your center is using insurance billing, click the Billing Settings button:
    - Use the pull down menus and text boxes to enter insurance billing information for the user. (Note: You should consult with your center administrator or use the state or federal guidelines for claim forms to learn more about these fields.)
    - If desired, use the mouse or touch pad to enter a signature to be added to insurance claims.
    - Click Close.

12. If desired, change appointment notifications (pop up window and chimes) which will notify you when appointments on your schedule have been marked as attended, canceled or rescheduled. (Note: Your computer speakers and volume must also be set to enable you to hear audio. Chimes only notify of arrivals, not when appointments end.)
    - Click in the check boxes to turn on/off notifications when appointment attendance is marked as "attended" or as "canceled" or "rescheduled"
    - Use the pull down menus to change the sound file used for notifications.
    - Use the pull down menu to change the volume, if desired.

11. For users granted sufficient permission by the center administrator to approve incoming web component data, change new incoming data notification as desired ((Note: Your computer speakers and volume must also be set to enable you to hear audio.)

- Click in the check boxes to turn notification on/off.
- Use the pull down menu to change the sound file used for notifications.
- Use the pull down menu to change the volume, if desired.

14.2 User Schedule Viewer Layout

On this tab, you can set defaults for the layout of the calendar (schedule) screen. Options on this screen include:

- **Start time:** Click in this box to change the time that shows at the top of the schedule.

- **Interval time:** Click in this box to change the time intervals (in minutes) displayed on the schedule.

- **Number of rows:** Click in this box to change the number of rows which will appear on the schedule. (Note: The amount of time will vary based on intervals and number of rows. So, if intervals are set for 30 minutes, and rows are set for 24, then 12 hours will be displayed on the schedule.)

- **Number of columns:** Click in this box to change the number of columns that will appear on the schedule. (Note: The green arrow buttons at the top of the calendar screen can be used to navigate among columns that are not displayed by default.)

- **Weekly format:** Use the pull down menu to show or suppress weekends. (Note: The Go To button on the menu bar can be used to navigate directly to a weekend day, even if weekends are suppressed.)

- **Day header format:** Click in this box to change from the standard day header format of "Weekday, Month Date" to a different Windows standard format.

- **Schedule header font:** Click the ellipse button (3 dots) to open the font selection window to choose a different font for the top header row on the schedule when viewing multiple user schedules for a single day.

- **Day header font:** Click the ellipse button (3 dots) to open the font selection window to choose a different font for the second row on the schedule when viewing multiple user schedules for a single day.

- **Swap header fonts:** When viewing a single schedule over multiple days, there will be only one header row. Click this check box to use the Schedule Header Font as the header row font in single schedule view.

- **Enable refresh:** If desired, click the check box to refresh the screen when users are working in Titanium and set the refresh interval in seconds. (Note: If you do not check this box, when users are working in Titanium for a long period of time, they will not see updated data).

- **Limit refresh:** If you clicked to refresh user screens, click in the next check box to limit refresh to when users do not have a window open (i.e., when only the calendar screen is displayed).

- **Enable quick date navigation:** Click in this check box to allow users to navigate the schedule using short cut keys instead of a mouse. (Note: On the calendar screen, click Navigate on the menu to see a list of keyboard short cut keys which will be disabled unless this option is checked.)

- **Schedule to be displayed on log in:** Click one of the radio buttons to set the default schedule display when a user logs in to either their own schedule, or schedules for a group. If you choose to display schedules for a user group, click the pull down menu to choose from among the groups that you created.

- **Appointment block font**: Click the ellipse button (3 dots) to open the font selection window to choose a different font for the text displayed on appointment blocks.

- **Appointment block information display format:** Use the pull down menu to choose the information shown on schedule blocks.

- **Appointment icons:** Click in the check boxes to choose the icons that will be displayed in appointment blocks.

- **Non-attended appointment format:** Use the pull down menu to select whether/how non-attended appointments will be displayed on the schedule.

- **Display appointment length:** Use the pull down menu to choose whether appointment length will be displayed in the appointment block. (Note: Because you will be able to see the start/end times for appointments on the schedule, this option is not used often.)

- **Display description:** Check this box to display information in the appointment description field in the appointment block.

- **Mouse-over display:** Click in these check boxes if you want provider appointment count for the client, center appointment count for the client, or client student ID to display with the user hovers over the appointment with their mouse.

- **Intake appointments in count:** If you click in this check box, intake appointments will not be counted in the mouse-over displays for appointment counts.

- **Appointment Count Start Date:** By default, appointment counts in Titanium are aligned to the year start date that your center administrator chooses. To use a different date, enter it in the date window.

Common options for Windows standard formats:

Desired format	**Enter in Day header format box**

Thursday, August 07 (Titanium default)	dddd, MMMM dd, yyyy
Thu, Aug 07	ddd, MMM dd
August 07	MMMM dd
August 7	MMMM d
August 7, 2014	MMMM d, yyyy
08-07-2014	MM-dd-yy

dd = day of the month

dddd = day of the week

MM = number of the month

MMMM = name of the month

yyyy = year

14.3 User Schedule Viewer Colors

On this tab, you will set the default colors for the schedule. This will be much like creating a theme in Windows.

To change colors for any of the elements on the calendar screen:

1. Click in the colored box for the item that you want to change. (Note: See list of items below.)
2. If required, choose an option from the menu. (Note: Foreground is text color, and background is item color.)
3. On the color picker window, choose a new color. (Note: Click the Define Custom Colors button for more color options.)
4. Click OK.

5. Click Apply to see the effects of your changes.
6. If you don't like your changes, click the Reset to Default Colors button to erase your changes.

Item List:

- **Schedule header:** Top row on the schedule screen
- **Selected schedule header:** Top row on the schedule screen for the schedule where your mouse is located
- **Day header:** Second row on the schedule screen
- **Selected day header:** Second row on the schedule screen for the schedule where your mouse is located
- **Default background:** Schedule where no appointments are shown
- **Weekend background:** Schedule where no appointments are shown on weekend days as designated on the Schedule Viewer Layout tab
- **First weekday background:** Schedule where no appointments are shown on Mondays
- **Cursor box:** Box that appears around the space on which your mouse is located on the schedule
- **Appointment border:** Box that appears around the appointment block
- **Appointment highlight:** Box that appears around the appointment block when you hover over it with your mouse
- **Vertical grid lines:** Lines that appear between user schedules or days of the week
- **Horizontal grid lines 1:** Lines that appear before hours on the schedule
- **Horizontal grid lines 2:** Lines that appear before interval times chosen on the Schedule Viewer Layout tab
- **Foreground 1:** Color of the font of hours that appear on the time line at the left of the schedule
- **Foreground 2:** Color of the interval times that appear on the time line at the left of the schedule
- **Background view normal:** Color in the background of the time line at the left of the schedule
- **Background canceled view:** Background color of the schedule time line at the left of the schedule when viewing only canceled appointments on the schedule. (Note: To display only canceled appointments, from the calendar screen, click View > View Only Canceled Appointments).
- **Background placeholder view:** Background color of the schedule time line at the left of the schedule when viewing only placeholders or recurring appointments on the schedule. (Note: To display only canceled appointments, from the calendar screen, click View > View Recurring Definitions and Placeholders Only).

14.4 User Interface Tab

On this tab, you can set defaults for the way Titanium behaves when you are logged in. Options on this screen include:

- **Default application font:** Click the ellipse button (3 dots) to open the font selection window to choose a different font for the screens in Titanium.
- **Default application toolbar font:** Click the ellipse button (3 dots) to open the font selection window to choose a different font for the tool bars in Titanium.
- **Screen font for note narrative:** Click the ellipse button (3 dots) to open the font selection window to choose a different font for the narrative tab in notes.
- **Remember and reuse last report viewer zoom settings**: Click in the check box to have Titanium re-use the viewer settings on the preview screen for reports (Note: Zoom settings are accessed on the Page Width pull down menu of the report preview screen.)
- **Show advanced export options:** Users with permission to generate reports can export some reports if this box is checked.
- **Alternate sound player**: Click in this check box to use an alternate sound player, instead of your computer's speakers
- **Show tooltip:** Click the check box to see tool tips about right click menus when working with narrative text boxes
- **Automatically expand all:** Click the check box to view client files in expanded format by default
- **Display first line of note narrative:** Check this box to view the first line of a note in the client file view with the date and note author to label notes.
- **Show confirmation prompt for edit mode:** Click the check box if you want Titanium to show a prompt if you click escape or cancel without saving changes.
- **Show confirmation prompt for overlapping appointments:** Click the check box if you want Titanium to prompt you if changes to an appointment will cause an overlap with another appointment.
- **Show confirmation prompt for appointments moved using drag and drop.** Click the check box if you want Titanium to prompt you if you edit appointments by using a mouse (drag, drop).
- **Number of items in drop down box:** Enter a the number of of items that should be displayed in drop down boxes (pull down menus) throughout the program
- **Find Client Initially Active Field**: Use the pull down menu to choose the field where the cursor will be when the Find/Add client window opens.

- **Default source folder for files to attach:** Depending on the settings chosen by your center administrator, you may be able to set the default folder for attachments. When you click to add attachments to notes, this is the folder that will open, and you will be able to navigate to other locations on your computer. To set, click click the ellipse (3 dots) button and use the Windows interface to browse to the folder.

- **Window settings persistence**: If you resize Titanium windows while working and want the windows to retain your custom sizing, click in the Remember and reuse window check box and click size and/or position to indicate what you want the program to remember. To return to Titanium defaults, click in the Forget window settings check box and forget window settings now button.

14.5 Calendar Sync

Calendar Sync is an optional feature which may have been purchased by your center. This feature copies non-confidential appointment information from Titanium to Microsoft Exchange (Outlook) or Google calendars. Placeholders will not be copied to your external calendar.

This feature is commonly used to show “busy” times on Outlook or Exchange calendars, and to allow Titanium users to view their Titanium schedules when they are out of the office. You should ask your center administrator how calendar sync will function in your center, including type of external calendar you can use, when calendar sync will occur, and whether you can create appointments on your external calendar to be copied into Titanium.

This feature is configured by your center administrator.

Notes: If you want to sync to a Google web mail calendar, create your Google account before proceeding.

What would you like to do?

- ○ Configure Calendar Sync
- ○ Create Appointments to be Copied into Titanium
- ○ Manually Sync Calendars

Configure Calendar Sync

1. Ask your center administrator whether sync will be to Exchange, Google or both.

2. From the calendar screen, click Configure > User Configuration.

3. Click the Calendar Sync tab. (Note: If your center is not using this feature, the tab will not be visible.)

4. For Exchange calendar sync:

   - ○ Enter your email address.

- Click Ok.
- Exit Titanium and log back in.
- Enter your Exchange password on the prompt. (The prompt may be behind the Titanium loading screen.)
- If using modern authentication, on the next screen choose your Exchange account, click to accept the permissions prompt or to request approval, and click Accept.

5. For Google calendar sync:
    - Click Authorize.
    - If necessary, click to allow your web browser to open.
    - Log into your Google account.
    - Click Accept.
    - Close your browser window.
    - In Titanium, click OK on the "Authorization request successfully completed" window.
    - Use the pull down menu to select the calendar to sync with Titanium. (Note: You can stop the sync to the Google calendar in the future by clicking Revoke.)
    - Click Ok.

Create Appointments to be Copied into Titanium

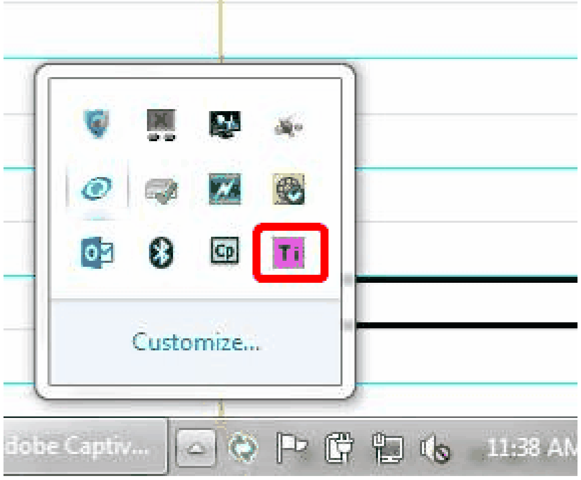
If your system administrator chooses to do so, it is possible for appointments created on external calendars to be copied into Titanium. If your system administrator has chosen to use this feature, they should provide a subject prefix. To create an external appointment that will be copied into Titanium:

1. On your external calendar, open a new appointment.
2. In the subject field, enter the prefix provided by your system administrator.
3. Enter the rest of the subject.
4. Enter the appointment information and save as you normally would.
5. After the next full calendar sync copies the appointment to Titanium, edit the appointment to make required changes to appointment type, appointment code, and client information.

Note: Recurring meetings or those with multiple attendees will not automatically be synced to Titanium. Users must manually create or copy these appointments. If you accept a meeting notice from someone else, you must either manually add the prefix in Step 2 above (for Outlook) or duplicate the appointment and enter the prefix (Google).

Manually Sync Calendar

1. Click the Titanium Calendar icon on your system tray.



2. Choose Open.
3. On the pop-up window, click Synchronize > Start a Full Sync now.
4. Click File > Minimize to Tray.
5. If an error occurs indicating that the sync failed, contact your center administrator for assistance.

Using Google Accounts

Note: If you have a Google account already, you can use it with Calendar Sync. However, if you keep personal items on the calendar, you may wish to create a secondary calendar (Step 13).

1. Use your web browser to navigate to the Google accounts page.
2. Click Create an Account.
3. Enter the information to create an account (i.e., name, password, accept terms of service).
4. Click Next Step.
5. On the next screen, click No Thanks.

6. On the next screen, click Get Started.

7. Click the Settings icon in the upper, right corner, and choose Calendar.

8. Click the calendar settings gear icon, and choose Settings from the drop down menu.

9. Click the Calendars tab.

10. Click the name of the calendar in the list.

11. If desired, change the name of the calendar to make it easier to find in user configuration in Titanium. (Note: The calendar will default to your user name. Consider renaming it something like *TitaniumYourName.*)

12. Click Save.

13. To create a secondary calendar, click Create New Calendar.

    o Enter the desired calendar name.

    o Click Create Calendar.

14. Log out.

14.6 CCMH

The Center for Collegiate Mental Health (CCMH) is a multi-disciplinary, member-driven research center focused on providing accurate and up-to-date information about the mental health of today's college students. Their mission is to bridge the gap between the science and practice of providing college student mental health services. CCMH has created a national database using de-identified data from college counseling centers nationwide. Centers that choose to participate in this initiative transmit data to CCMH and are allowed to access for research purposes.

If your center administrator chooses to participate in the initiative, your demographic data will be transmitted. To enter demographic data:

1. Navigate to User Configuration > CCMH tab.

2. Click Enter Information About Yourself button.

3. Click Edit on the menu bar.

4. Use the radio buttons, check boxes, text boxes and pull down menus to enter information.

5. Click Save.

6. Click Exit.

15 User Permissions

The information below is for default permissions. Some settings can be changed on tabs throughout the system configuration screen.

User Security Levels assigned by System Administrator:

Provider 1: View/modify all schedules, create/access all data for all clients and non-clients, assign clients to counselors, automatically added to client screen when creating clients, view/create invoices

Provider 2: View all schedules, modify only assigned schedules, create/access all data for all clients and non-clients, assign clients to counselors

Provider 3: View all schedules, modify only assigned schedules, see client names on appointments only on own schedule, create/access all data for assigned clients (Note: Provider 3 users may be restricted to viewing only their own schedules. If so, then they will be unable to use the Find Open feature to search for appointments.), create/access group notes for group appointments on which they are a resource, create/access non-confidential non-client notes or assigned confidential non-client notes

Support Staff: View/modify all schedules, create/access non-confidential data for all clients and non-clients, assign clients to counselors, view/create invoices

IT Staff: View version information, complete some diagnostic checks, and check for and install software updates

Temporary Emergency Access: Allows access in the event that no System Administrator can log on (forgotten passwords, unavailable). This level allows a one-time access to the Users and Schedules tab in system configuration, for the purposes of resetting a System Administrator password. Titanium **strongly** recommends creating at least one Temporary Emergency Access account, and storing the information securely in the center. Titanium Support is **unable** to assist you in logging into the system if System Administrators forget their passwords or are unavailable.

SystemAdmin: Unabridged rights to perform any actions throughout the entire system including but not limited to configure system, create all user accounts, view/modify all schedules, create/access all data for all clients, able to combine clients, able to delete and purge clients from system (electronic shred), able to export raw data and billing using Reports function

Supervision Levels assigned by System Administrator:

Supervisor: Can sign notes on Lines 1, 2 and 3, able to view My Clients/task lists of other users

Supervisor in Training 1: Can sign notes on Line 2, and Line 3 if Line 1 is not blank, able to view My Clients/task lists of other users

Supervisor in Training 2: Can sign notes on Lines 1 and 2, able to view My Clients/task lists of other users

Unsupervised: Can sign notes on Lines 2 or 3, but only if Line 1 is blank

Under Supervision: Can sign notes on Line 1

N/A: Cannot sign notes

Client-Level Security Settings:

System Admin users can change client-level security settings from standard to more restricted settings.

Standard: User settings above apply to the client

Confidential: Restricts access to the client's confidential client notes to only the SystemAdmin user and the users assigned to the client

Entire case file: Restricts access to the entire client's file (including non-confidential notes and appointment history) to only the SystemAdmin user and the users assigned to the client

Reports:

By default, all users can view and save reports. By default only System Admin users can export raw data. System Administrators can change these defaults on the Security tab in system configuration.

16 Web Component

The online web component feature allows clients to complete forms for intake, follows ups, surveys or research via an internet browser running on a computer or tablet. It may also be used for online appointment scheduling This feature is configured by your center administrator. If clients enter contact information on the web component, it will overwrite any information already in their client screen.

(Note: To have clients of the center complete anonymous surveys, create a new client called Survey and set the student ID to an easily recalled number. When clients complete the survey on the web component, have them enter the ID number of the survey client, and then complete the survey. The surveys will be added to the file of the Survey client.)

What would you like to do?

- ○ Approve incoming data
- ○ Edit incoming data
- ○ Delete incoming data
- ○ Find missing data
- ○ End session
- ○ Web component passwords

Approve Incoming Data

After clients enter their information, a Titanium user must approve the incoming data to ensure that it is valid and correct. If your center administrator has given you permission to do so, approve incoming data by:

1. From the calendar screen, click Open > Approve Incoming Data.

2. Review the entries based on the following table.

Status Column	Meaning	User Action
MATCH	Incoming data is an exact match for an existing client	Process the entry if it appears to be valid
NO MATCH	No matching client in Titanium.	If this is a new client, then process the data to create the client in Titanium. If it is an existing client, edit the student ID or birth date on either the incoming data or existing client screen.
NAME MISMATCH	There is a client with the same Student ID and birth date but the names do not match.	If the names are similar, then edit the names on incoming data or existing client screen. If the names are not similar, then edit the

		student ID or birth date in the incoming data.
MULTIPLE MATCH	Multiple clients with the same Student ID and birth date	Combine clients in Titanium to remove the duplicate entries or edit client records in Titanium to correct errors.
NO STUDENT ID OR BIRTH DATE	There's no incoming data to match to a client in Titanium	Open incoming data and edit it to enter the information.

3. If necessary, edit incoming data:
    - Click on the desired entry to select it.
    - Click the Incoming Data icon on the menu bar.
    - From the drop down menu, choose Open Incoming Client
    - Click Edit icon on the menu bar.
    - Make the desired changes.
    - Click Save.
    - Click Exit.
4. If necessary, manually match incoming data to an existing client:
    - Click the Matching in Titanium icon on the menu bar.
    - Choose Assign a matching Titanium client to the incoming client
    - Search for the desired client.
    - Click Yes to confirm.
5. Click the Reset/Refresh icon.
6. Select entries to be processed by clicking check boxes to the left of desired entries or using the Select icon on the menu bar.
7. Click Process Selected.
8. Depending on the settings chosen by your center administrator, use the pop-up window to determine whether to associate the incoming data forms with an appointment
    - Uncheck the box to review appointments not on the current day
    - Click on the desired appointment with which to associate the forms
    - Click the blank entry to create a note in the client file that is not associated with an appointment.

Edit Incoming Data

If a client states that they made a mistake when completing a data form, you may be able to edit the form, depending on the settings chosen by your center administrator.

1. From the calendar screen, click Open > Approve Incoming Data.
2. Click to select the entry.
3. Click the Incoming Data icon on the menu bar.
4. From the drop down menu, click Open Incoming Data and choose the form.
5. Click Edit on the menu bar, and make required changes.
6. Click Save.
7. Click Exit.

Delete Incoming Data

If incoming entries were created in error or are not valid:

1. From the calendar screen, click Open > Approve Incoming Data.
2. Click to select the entry.
3. Click the Incoming Data icon on the menu bar.
4. From the drop down menu, click Delete Selected.
5. Click Ok.

Find Missing Data

If forms do not appear in the client file:

1. Perform a client search using a partial name to determine whether a duplicate client was created. If a duplicate client was created, contact your system administrator to combine the

clients.

2. Perform an advanced client search for data forms added to Titanium on the day the data was processed. If the data form was placed in the wrong client file, a user can recreate the form as part of a note, or the client can complete the web component form again.

3. Notify your center administrator that the forms may have been deleted. Ask the center administrator to run an audit on the actions associated with that client. If the forms have been deleted, a user can recreate the form as part of a note, or the client can complete the web component form again.

4. CCAPS 2015 or newer forms will not be placed in client files unless your center administrator has entered CCMH membership information in the System Configuration area in Titanium. If CCAPS forms are not being placed in client files, contact your center administrator for assistance.

End Session

If a client only partially completes data forms due to a session time out or error, the approve incoming data window will show that the session is in progress in the data forms column. To end the session:

1. From the calendar screen, click Open > Approve Incoming Data.

2. Click to select the row.

3. Click the Incoming Data icon on the menu bar.

4. Choose End Client Session from the pull down menu.

Web Component Passwords

Depending on the settings chosen by your center administrator, cliends may be uanble to enter data without a password. To provide a password:

1. From the calendar screen, click Open > Approve Incoming Data.

2. Click the Security icon on the mneu bar.

3. Choose an unexpired password from the table, and provide to client. (Note: If all passwords are expired, contact your center administrator for assistance.

17 Accessibility Tips

There are several configuration settings and navigation tips that can be useful to Titanium Schedule users who also use assistive technology. Configuration settings, job responsibilities, workflow, and access may all interact to affect the performance of assistive technology with Titanium Schedule. Please contact Titanium Support for one-on-one assistance at either Support@TitaniumSoftware.cm or 281-443-3544, menu option 2.

What would you like to learn about?

- User Configuration Settings
- Keyboard Shortcuts
- System Configuration Settings

User Configuration Settings

These tips can be helpful for users who are blind or vision impaired.

1. Defaults tab. There are 3 different audio chimes available to turn on. One for when appointments are marked attended, one for attendance being changed to canceled or rescheduled, and one for incoming data from the web component. The chimes can be tested on this screen, so that users know the sound that corresponds with each notification.

2. Schedule viewer layout tab.

   - Interval: If there is a typical appointment length in your center, consider changing the interval to match that length. Navigation on the schedule screen with the up/down arrow keys will match that interval.

   - Display Schedule: Choose the default to be your schedule over multiple days. In this display, the tab key can be used to focus the cursor on placeholders and appointments in schedule order (down the current day, then to the next column, and the next). Use the arrow keys to navigate to blank schedule times in order to make new appointments. Use the F8 key to open the window to navigate to schedules of other users in single schedule view, and to return to your own schedule.

   - Display Appointment Format: Choose a format that includes the client name and description. Then when tabbing on the schedule screen, screen readers will speak the client name and appointment code.

If you are using a magnification program:

- Number of rows / columns: Consider reducing the number of rows and columns to be displayed on the schedule screen so that schedule items are display in larger blocks.

- Display Appointment Start Time: This can be helpful because the start time of the appointment will be displayed on the appointment block itself.

- Font sizes: Schedule and day header fonts can be changed to font that is easier to read, put in bold and enlarged.

3. Schedule viewer color tab. You can change the schedule colors for higher contrast. Contact your center administrator about color contrast problems with appointments and placeholders. (Note: The High Contrast tool in Windows will have an effect tool bars and screens in Titanium, and may make the screens easier to see for vision impaired users.)

4. User interface tab. Fonts for the application, tool bars and screen can be changed to font type that is easier to read, put in bold and enlarged.

Keyboard Shortcuts

Titanium is a Windows program, so standard Windows shortcuts can be used throughout the program. Shortcuts for some specific functions are listed below. Voice recognition programs can also be used to navigate in Titanium.

Keyboard Sequence	**Action**
F1	Help
ALT + F4	Exit report windows in the program
F7	In text boxes, opens spell check function.
F8	On the schedule screen, opens the Go To Date navigation. Select date and schedule, and hit enter. Cursor will highlight the time block on the selected schedule that it occupied when search was initiated.
F9	Highlight second menu bar, if one appears on the screen
F10	Highlight menu bar. On schedule screen, use to toggle between the two tool menu bars.
Shift + F10	In text boxes, perform the equivalent of right clicking on the mouse to bring up the menu
Alt + Underlined letter	On multiple screens, buttons on menu bars and menu items have underlined letters. Press ALT and the underlined letter to select the button.
Enter	Select an item. If the cursor is on an empty block on the schedule

	screen, pressing enter will open the Add menu which can also be accessed by right clicking.
Space bar	If in a table list, pressing will select the item.
Tab	Move forward among fields or elements on a window. Putting windows in edit mode changes tab order and improves performance on some screens (e.g. client record, appointments). Use the tab key on the schedule screen to highlight appointments and placeholders on the schedule screen. Tabbing will move from schedule column top to bottom and then to the next column to the right at the top.
Shift + Tab	Move backward among tab stops on a window.
Control + Tab	If in a narrative box, the cursor / focus will move to the next control on the screen. If on a screen with multiple tabs, the cursor / focus will move to the next tab.
Arrow keys	Navigate time slots on the schedule screen. Note that arrow keys cannot be used to select appointments and placeholders for screen readers. Can be used to navigate drop down menus and lists. If on a window with multiple tabs, right and left keys can be used to highlight tabs.
Down arrow	On the task list, press F10 to highlight the menu bar. Then press the down arrow to access the Show Tasks For menu.
Alt + right / left arrow key	On schedule screen, will move the schedule forward or back one day at a time.
Control + right / left arrow key	On schedule screen, will move the display over by the number of columns displayed. (For instance, if 5 columns are displayed, pressing Control and right arrow, will move the view to the 6th column.)
Control + A	If cursor is in a narrative box, the entire content of the box will be selected.
Control + P	Access the print window on the Reports screen.
Control + X	Access the export window on the Reports screen.
Esc	Depending on the screen and mode, can select cancel, close a window, or select the schedule screen from the menu bars.
Control + C	In text boxes, allows copy selected text. From the schedule screen, opens the Find Clients menu.
Control + P	In text boxes, allows paste of copied text.

Control + Up or Down Arrows	Allows individual entries to be moved up or down in the list on screens where single entry movement to reorder is possible (e.g. selecting data forms to display on web component menu, ordering user and schedule group entries, ordering appointment code group entries).
Shift + arrow key	In text boxes, selects text.
ALT + Down Arrow	Opens drop down menus
Esc	On some windows, can be used to close the window.
Navigation shortcuts	If enabled by the System Admin or user, there are keyboard shortcuts available to navigate the schedule screen. These shortcuts are shown on the Navigate menu on the schedule screen. Click Alt + N on the schedule screen to review the shortcuts, or review the list below.
Home	On the schedule screen, will return the schedule to the current day, left column of the display, and earliest time slot on the schedule
Page Up	On the schedule screen, will move the schedule to the previous day
Page Down	On the schedule screen, will move the schedule to the next day.
Shift + F3	On the schedule screen, will move the schedule back one week
F3	On the schedule screen, will move the schedule forward one week
Shift + F4	On the schedule screen, will move the schedule back four weeks
F4	On the schedule screen, will move the schedule forward four weeks
Control + F	On the schedule screen, opens the find clients window
Control + O	On the schedule screen, opens the find open appointments window

System Configuration Settings

Configuration settings can make Titanium less accessible for users of assistive technology. If one of your users is blind or vision impaired, you should review and consider the following tips:

- User Configuration - When adding the user, preset their configuration settings as suggested above by clicking Change User Configuration.
- Appointment Codes -
  - Choose descriptive titles that are as short as possible.
  - Choose block and text colors that have high contrast.

  - Where possible, set a default note type and template so users don't have to select them.

- Flags - If using flags, consider setting to "notification" so the flag alert pops up when users interact with the client record. Screen readers will refocus to the notification screen and read the content, so that users know that the client is flagged.

- Data Forms -

  - Alternate text signature. Users who cannot operate a mouse won't be able to fill in the data form element "signature." Plan to either use a short text box with statement that this is the user's signature either instead of or as an alternative to signatures.

  - Format order. Test your data forms by tabbing through them to ensure that the focus order is as intended. Data forms formatted with multi-column layout may not be navigated as intended when using a keyboard only.

- Task List -

  - Consider changing default colors for higher contrast.

  - Check the setting to show task list count on log in to notify users of tasks to be completed.

- Insurance Billing - Users who cannot operate a mouse won't be able to fill in the "signature" for insurance billing. An alternative signature should be used.

18 Building Lists

Throughout Titanium's, you will encounter screens on which you will build lists for various purposes. These screens mostly have the same menu options and functionality.

What would you like to do?

- Add list item
- Edit list item
- Delete list item
- Reorder list items
- View only active items
- Select columns shown on screen

Add List Items

1. Click the New icon on the menu bar.
2. Click on the name or description field to enter text.
3. Use the pull down menus and check boxes to select desired settings.
4. Click the Active check box to make the item available for use.
5. Click Save.
6. Click Exit

Edit List Items

After a list item has been used, best practice is to uncheck the Active check box to discontinue use of the item, and create a new item.

1. Click on the list item to select it.
2. Click Edit icon on the menu bar.
3. Make desired changes.
4. If entering new entries on a Listing tab, click on the Details tab to make settings or add information, if required.

5. Click Save.

6. Click Exit.

Delete List Items

After a list item has been used, you will probably be unable to delete it. Instead, uncheck the Active check box to discontinue use of the item, and create a new item.

1. Click on the list item to select it.

2. Click the Delete icon on the menu bar.

3. If a pop-up warning appears, click OK or Yes to delete the item.

4. Click Save.

5. Click Exit.

Reorder List Items

Note: Many lists are used to create pull down menus from which users will choose. The items will appear on the user pull down menu in the order shown on the list that you are creating.

1. Click the Reorder icon on the menu bar.

2. Click on the gray square to the left of the item to be moved.

3. Drag the item to the new location.

4. Click Save.

5. Click Exit.

- Custom Order

1. Click in the gray square to the left of the desired list item.

2. Drag it to the desired position.

View Only Active Items

- Click the Hide Inactive Records check box at the top of the screen, or
- Use Show pull down menu to select a filter option

Select Columns Shown on Screens

Note: Only items shown in the Selected pane will be seen on the screen. The first item in the Selected pane will appear at the left of the Titanium user screen.

1. Click a list item in the Not Selected pane. (Note: Click in the Display Alphabetically check box to show items in alphabetical order.)
2. Click the Add button in the center of the window to move the list item to the Selected pane.
3. Click a list item in the Selected pane.
4. Click the Remove button in the center of the window to move the list item to the Not Selected pane.
5. Repeat Steps 1-4 until all desired headings are shown in the Selected pane.
6. To reorder items, click in the gray square to the left of an item in the Selected pane and drag to the desired position. (Note: Items will appear on Titanium user screens in order from left to right. If you click Sort Alphabetically, items will be shown in alphabetical order on both the configuration and user screens. Therefore, alphabetical sort may not be the best choice for selected items.)
7. Click OK to save changes.

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