



LocuTour Client Manager

Version 2.2.0 – User Manual

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1 Introduction

1.1 What is *Client Manager*?

Every speech professional knows how important it is to keep track of client progress. With accurate progress reports, it is easier to tailor treatment to a client's changing needs. We also know how hard it is to keep track of so many print-outs, handwritten notes, paper tests, and homework papers. Even if you take the time to record everything in one place, you can never record everything you might someday need to know.

Enter *Client Manager*, from LocuTour Multimedia. With *Client Manager* you can easily keep track of all of your clients' sessions. *Client Manager* will track the use of *Client Manager*-enabled software—including most LocuTour Multimedia products—as well as sessions that do not involve computer-based exercises. You can generate charts of client progress and print out progress reports to keep as records, give to clients and parents, use in IEPs, and submit to insurance companies. *Client Manager* remembers results from every session and every game played by each client, and provides you with an easy interface for looking up stored information. *Client Manager* handles the paperwork so you can spend more time with your clients.

1.2 What does *Client Manager* do?

Client Manager provides a framework for tracking client progress. It is especially useful for tracking progress for clients using *Client Manager*-enabled software. Its job is to track your clients' progress over time, and present this information in three formats: graphs, SOAP-format progress reports, and services summaries.

First you create a profile for each client. It will contain a complete record of all the *Client Manager*-enabled games the client plays. You can also enter information on sessions where no computer-based games were played. When you finish a *Client Manager* enabled game the program will remember data related to the game. It will record the time it took to complete a level, the number of mistakes made during a game, the number and type of speech productions, other game-specific information, and clinician notes.

You can use the stored information to generate graphs that clearly document progress from session-to-session, week-to-week, or month-to-month. You can customize the graphs that *Client Manager* produces to show just the information you need to track a client's progress. You can also generate and print a SOAP-format summary of client progress over time. The Session Summary

includes all session data and clinician notes. The Session Summary is stored in a normal word processing format that allows you to edit the information and print it out for archiving or presentation.

You can also use *Client Manager* to prepare a summary of client contact. The Services Summary collects and prints billing and insurance information for selected date ranges. As with the Session Summary the report is generated in a format that can be read and edited by any word processor. With *Client Manager* you can quickly and easily manage many clients, and always have access to stored data.

2 Tutorial

2.1 Creating a Client Profile

When you first start *Client Manager*, you'll see a log-in screen, as shown in Figure 1. The log-in screen prevents unauthorized persons from looking at confidential medical records¹.



Figure 1: Log-in Screen

***Client Manager*, does not require a password but we strongly recommend that you use one as part of your procedures to comply with HIPPA and other applicable laws. *Client Manager* will only show**

¹You should always keep your computer secure, and never rely on Client Manager's security features alone. You should follow good security practices—such as regularly installing critical software updates—on your entire computer, not just in Client Manager.

the password box in the login screen after you have set a password. (We will show you how to set a password in section 2.5.) For now, in order to start *Client Manager*, simply click **OK**. Clicking **Cancel** will exit *Client Manager*.

Now you'll see the main *Client Manager* screen, as shown in Figure 2. It consists of a menu bar², two panels, and a set of buttons for each panel. The left panel lists all clients, and the right panel lists all sessions recorded for the currently selected client. The buttons are used to create, edit, or remove clients and sessions.

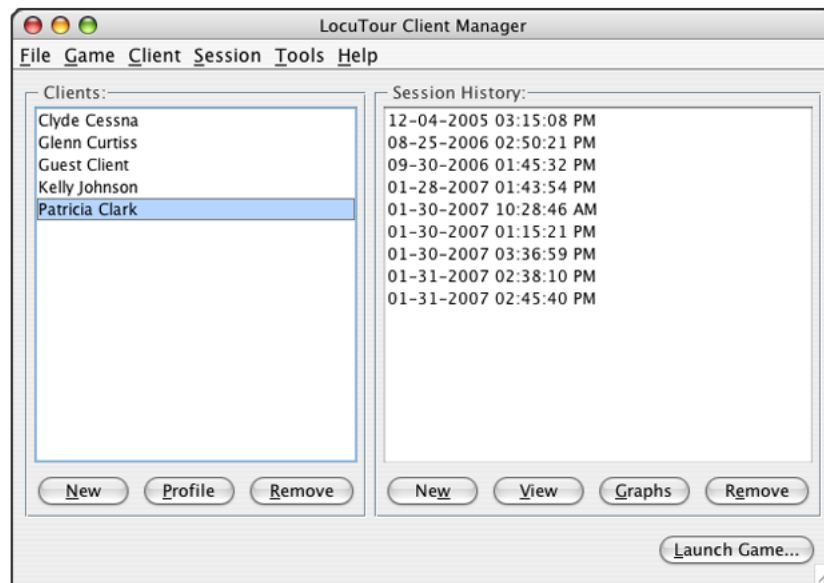


Figure 2: Main Screen

The **Clients** box and **Session History** box will be empty when you open *Client Manager* for the first time. To create your first client profile, click on the **New** button under the **Clients** panel, or use the **Client** menu option **New Client** at the top of the screen. You will now see the main **Client Profile** screen. This screen is used to edit and view client information, and to generate services summaries. The default **Client Profile** screen is shown in Figure 3. You may fill out as much or as little client information as you'd like, as long as a first or last name is provided. (You may wish to assign a number to a client instead of a first/last name, to protect their privacy.) The Date-of-Birth field has a default value that you should update. Click the **OK** button to create your first client. The main *Client Manager* screen will now show your new client in the **Clients** panel. You can edit a client profile either

²The commands in the menu bar will appear at the top of the screen if you are using a Macintosh.

by double-clicking on the client's name, or by using the **Profile** button below the **Clients** panel.

Figure 3: Client Profile Screen

The main **Client Profile** screen has tabs for entering additional information about the client. The **Medical Info** tab is used to enter the **Diagnosis**, **Prognosis**, **Referring Physician**, and **Current Level of Functioning**. Drop-down boxes can be used to quickly enter diagnosis codes and descriptions. Select the diagnosis code from the drop-down box and the number will appear in the panel below the box. Click on the **Add** button to have it added to the list. If you know the diagnosis code, you can enter it in the box and click the **Add** button to have the code and description entered in the box above. You can add additional comments to the **Diagnosis** panel by entering them in the input box below the drop-down box and then clicking the **Add** button.

If there is a diagnosis that you use frequently and it is not in the drop-down box, you can add it by using the **Edit List** button. You can also edit the text

of an existing diagnosis using this screen.

All of this information will be included when you print the Client Profile and when you generate a Services Summary page for billing.

The **Insurance** tab is used to enter insurance information about the client. This information will print when you print the Client Profile and when you generate a **Services Summary** page for billing. Each client may have one or more insurance policies. Policies are listed by the policyholder's name and the insurance company. You can add policies to a client by clicking the **Add Policy** button.

To specify the primary insurance policy to use, select the policy, then click the **Use as Default** button. That policy will move to the top of the list.

2.2 Accessing Session Data

2.2.1 Collecting Session Data Automatically

All data recorded in *Client Manager* is grouped into therapy sessions. You can immediately start recording data from a game by starting the game from within *Client Manager*. Once you have a client setup, select that client, click **Launch Game** and the game you want to play³. *Client Manager* will start the game, and the client may play through it normally.

Once the client has finished the game, *Client Manager* will return you to the login screen. When you log back in, *Client Manager* will open a new session window displaying the data recorded from that game. At this point, you may review the data, enter SOAP notes, or start another game using the session window's **Launch Game** button in the lower-right corner. If you choose to launch another game, that game's data will be appended to your session.

Game data that *Client Manager* has recorded will appear in the upper-right

³If you don't see the game in the list, see appendix A.1.

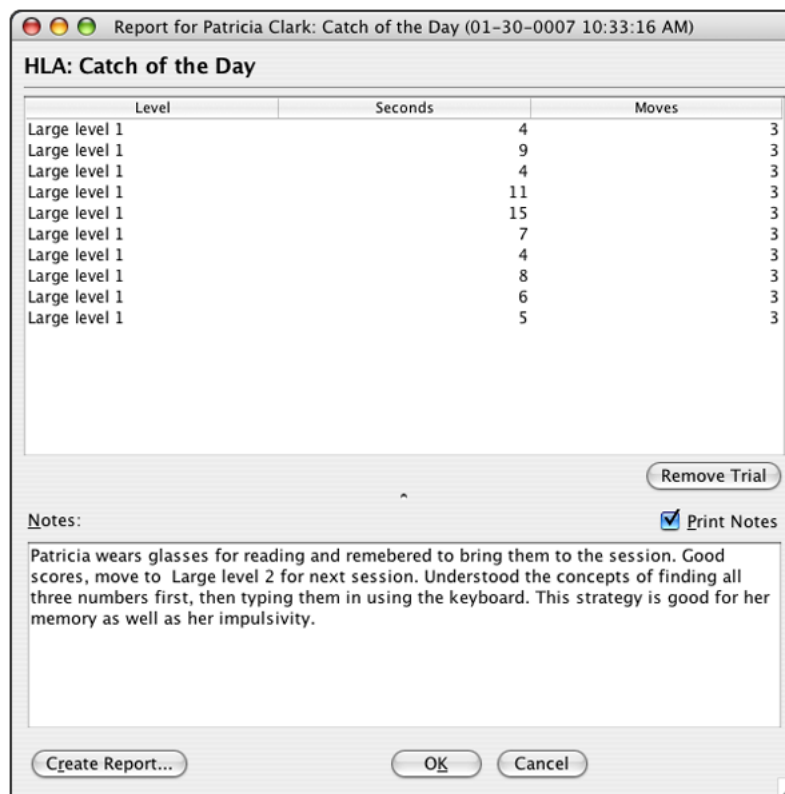


Figure 4: Report Window

corner of the session window. There will be a list of games the client played during this session. Double-clicking on one of the games will open a report window giving specific data on the client's performance.

Figure 4 shows a sample game report from LocuTour Multimedia's **High-Level Attention** software. Most games organize their data in a tabular format, with columns representing the different types of data collected, and rows representing individual trials in the game.

2.2.2 Making SOAP Notes Manually

You may, if you wish, track therapy sessions in which the client did not play games. To create a new therapy session in *Client Manager*, click the **New** button in the **Session History** box. *Client Manager* will open a blank session window (depicted in Figure 5) for the current date and time. At this point, you may enter your SOAP notes.

SOAP notes are entered in the bottom half of the window. There are four tabs, for Subjective, Objective, Assessment and Plan notes. In each tab, there is a space for you to type your notes, as well as a selection of boilerplate notes you may wish to use.

To include a boilerplate note, click the note. A check mark will appear in the box next to the note. After you have selected the notes you want, click the **Add to Notes** button to append them to your typed notes.

Some boilerplate notes may have blanks, denoted by “___” or “<placeholder>”. When you insert your notes, *Client Manager* will select the first blank so you can fill it in. Press **Tab** to move to the next blank, or **Shift+Tab** to move to the previous one.

You may also enter general (non-SOAP) notes in the box in the upper-left corner of the window. If you wish, you may keep these notes private by turning off the **Print Notes** checkbox above them.

2.2.3 Creating Session Reports

When you are satisfied with your notes, you can create a printable session report by clicking the **Create Report** button in the lower-right corner. This will create a report that can be edited in your word processor and printed out. Figure 6 shows a sample summary report.

You can create three types of session report:

Summary This includes only the SOAP notes, and a list of the games the client played.

Full In addition to SOAP notes, this includes all available data on the client's performance this session, including all the data recorded from each game the client played.

Abbreviated This is a shorter version of the full report. Games may choose to provide less detailed information, if they support it.

2.3 Graphs

As you collect more data from your clients, you may wish to see their progress over a particular period of time. *Client Manager* stores data for each game so that you can easily generate customized graphs for each client. Some *Client Manager*-enabled programs may come with pre-defined graphs. You may use them as is or customize them for each client.

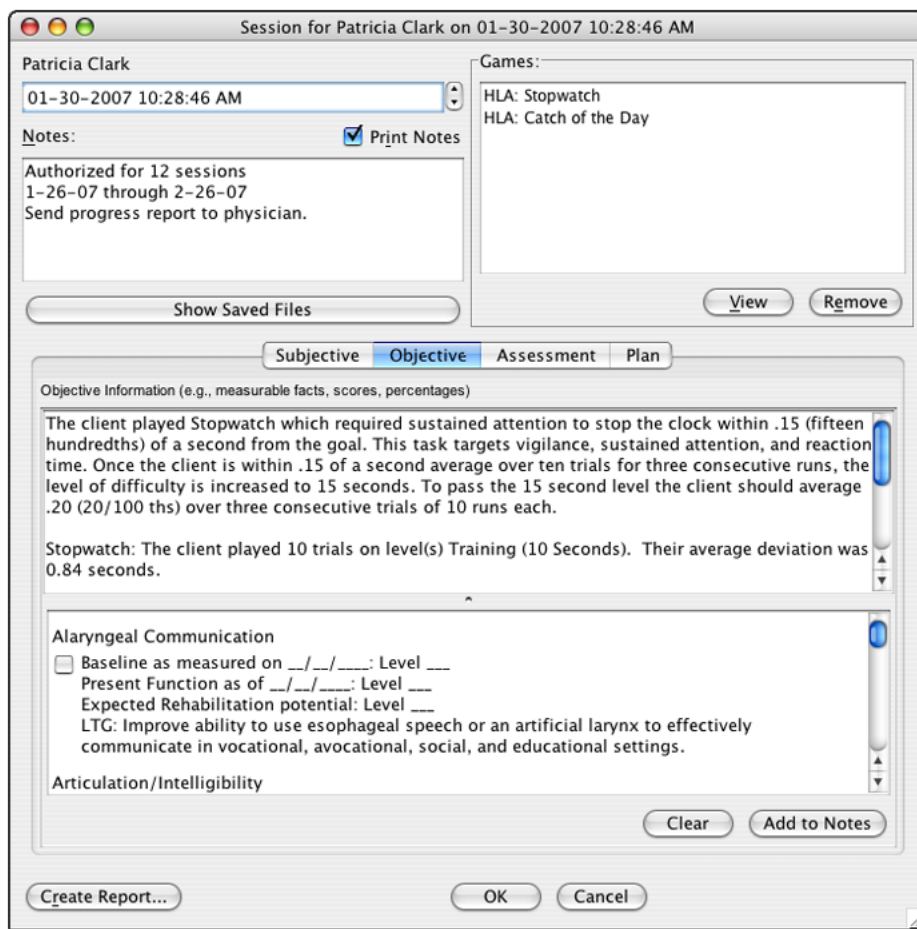


Figure 5: Client Manager Session Log

<p>Patricia Clark 01-30-2007 10:28:46 AM <small>Sally Provider -- Phone: (800) 777-3166 -- Fax: (805) 555-1234 -- E-Mail: SLP@TSLC.com</small></p>
<p>Session Activities: HLA: Stopwatch: Avg Deviation: 0.841 HLA: Catch of the Day: Avg Time: 7.3, Avg # Moves: 3.0</p>
<p>Subjective Notes: Patricia was alert and cooperative. She expressed anxiety concerning her performance. "I don't know if I can do this." Husband attended session in order to learn compensatory strategies.</p>
<p>Objective Notes: The client played Stopwatch which required sustained attention to stop the clock within .15 (fifteen hundredths) of a second from the goal. This task targets vigilance, sustained attention, and reaction time. Once the client is within .15 of a second average over ten trials for three consecutive runs, the level of difficulty is increased to 10 or 15 seconds. To pass the 15 second level the client should average .20 (20/100ths) over three consecutive trials of 10 runs each.</p> <p>Stopwatch: The client played 10 trials on level(s) Training (10 Seconds). Their average deviation was 0.84 seconds.</p> <p>The client played Catch of the Day which required visual scanning and identification as the complexity of the visual field increases. It provides the client with compensatory strategies for hemianopsia and left side neglect with the objective of decreasing response time as complexity increases. The goal: at levels 1-8 < 10 seconds, at levels 9-10 < 20 seconds average.</p> <p>Catch of the Day: The client played 10 trials on level(s) Large level 1. Their average time was 7.3 seconds, and they averaged 3 moves per game.</p>
<p>Assessment: There was good awareness of errors after they were made. Some spontaneous self-correction observed and consequently this resulted in hyper-anticipatory errors.</p>
<p>Plan: Will continue to require maximal assist with tasks that require new learning.</p>
<p>Other Notes: Authorized for 12 sessions 1-26-07 through 2-26-07 Send progress report to physician.</p>
<p>Sally Provider MA CCC/SLP</p>

Figure 6: Report: Client Manager Session Log

To view graphs for a particular client, return to the main *Client Manager* screen. Click on a client's name to highlight it then click the **Graphs** button below the **Session History** box. You will see a list of saved graphs (as depicted in Figure 7). This list contains pre-defined graphs and graphs that you created. To create a new graph, click the **New Graph** button at the bottom of the window.

Note:

The data in each graph is specific to each client but the graphs themselves can be shared. Graphs are saved to a central location in *Client Manager*. When you open the graph list for a client, *Client Manager* will display only graphs that are relevant to that client.

When you click **New Graph**, *Client Manager* will open the **Graph Builder** window, as shown in Figure 8. Give your graph a title, and pick a game from the drop-down list of games the client has played.

By default, *Client Manager* will use all available data to generate the graph. If you wish, however, you can choose to use only data collected over a certain

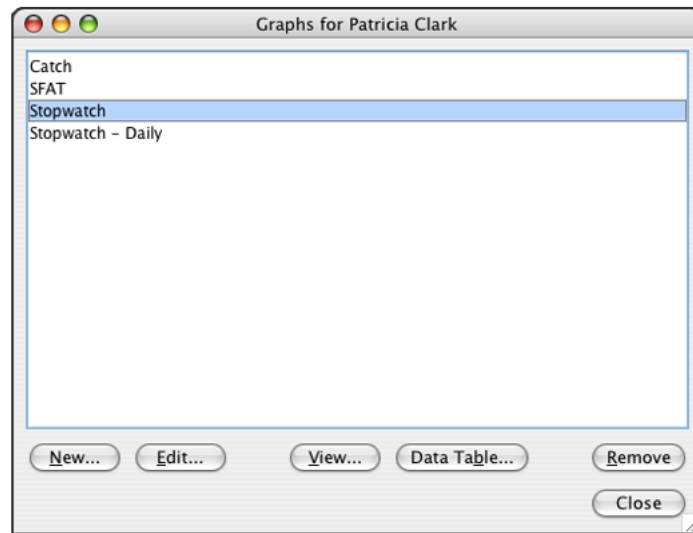


Figure 7: List of Graphs

period of time. To do this, click the **Show data from** radio button, and select the appropriate dates.

At this point, you may choose the options you wish to use for this graph. Most *Client Manager*-enabled games will have a set of options similar to those shown in Figure 8. Some games may have additional or different options, depending on the type of data the game collects. The graph title and time constraints are the only options available for graphs in *all* games.

The **Numeric Columns** box shows the variables that have been collected by the game. You can choose which variable to graph horizontally (the X-axis) and one or more variables to graph vertically (the Y-axis).

The horizontal axis is set to **Date** by default. The horizontal axis will show all of the days in the range that you have selected. In general, graphing by date gives you a good idea of how the client progressed over time. Alternatively, you may wish to graph by **Trial Number**. This view will show progress over time without the gaps from days when the client did not do the exercise. To change the horizontal axis from **Date** to **Trial Number**, click on **Trial Number** in the **Numeric Columns** box. It will highlight. Then click on the **Graph Horizontally** button and **Trial Number** will now display in the **Horizontal** box. *Client Manager* will let you use any variable in the numeric column you wish, so you can visualize aspects of your client's performance. It is up to you to make sure that the values you choose for the axes make sense.

Choose one or more variables for the vertical axis by either double-clicking on the variable in the **Numeric Columns** box or highlighting it and clicking

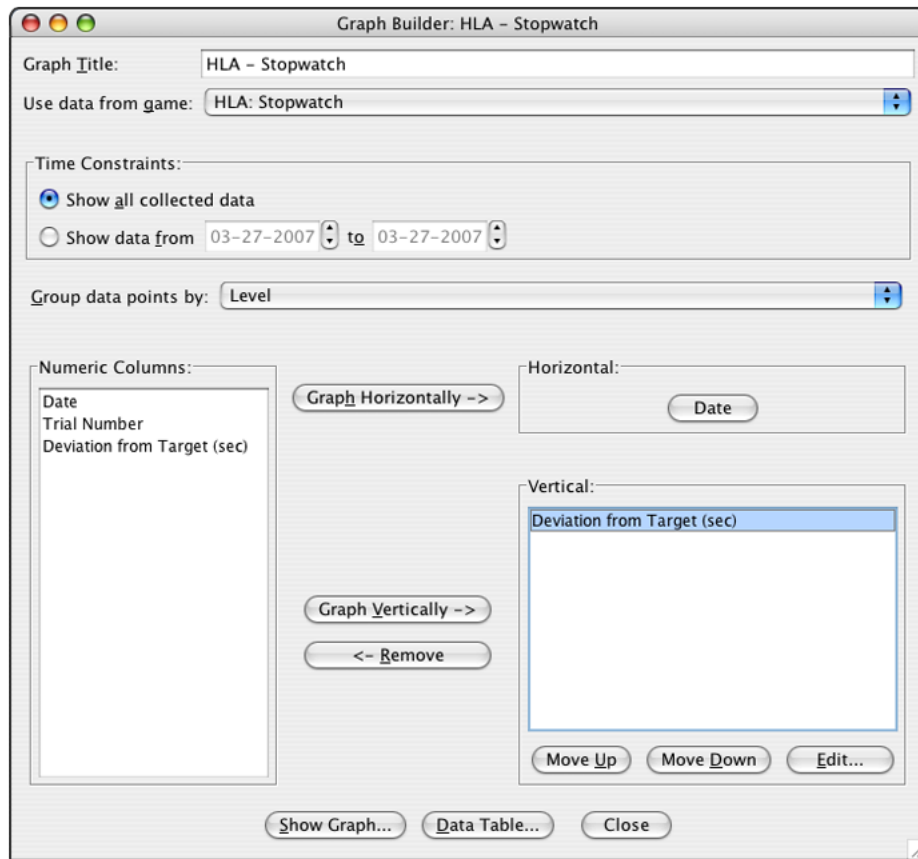


Figure 8: The Graph Builder Window

the **Graph Vertically** button. The variable you selected will be added to the **Vertical** list. You can change the ordering of the variables by highlighting one and then clicking the **Move Up** and **Move Down** buttons below the list.

Some *Client Manager* games may report level information—for example, the client may have played a game at Easy difficulty one week, and Medium difficulty the next. If this is the case, you may group the data points on your graph by selecting a column from the **Group data points by** drop-down box. This will cause *Client Manager* to place data points belonging to different levels on different lines on the graph. Additionally, each line will have a label next to it to identify it.

When you are satisfied with the options you have chosen for your graph, click the **Show Graph** button. *Client Manager* will automatically save your options, and open the graph in a new window, as shown in Figure 9. The graph type that you have created will be available to use with all of your clients. If you have made customizations, you may wish to use a detailed

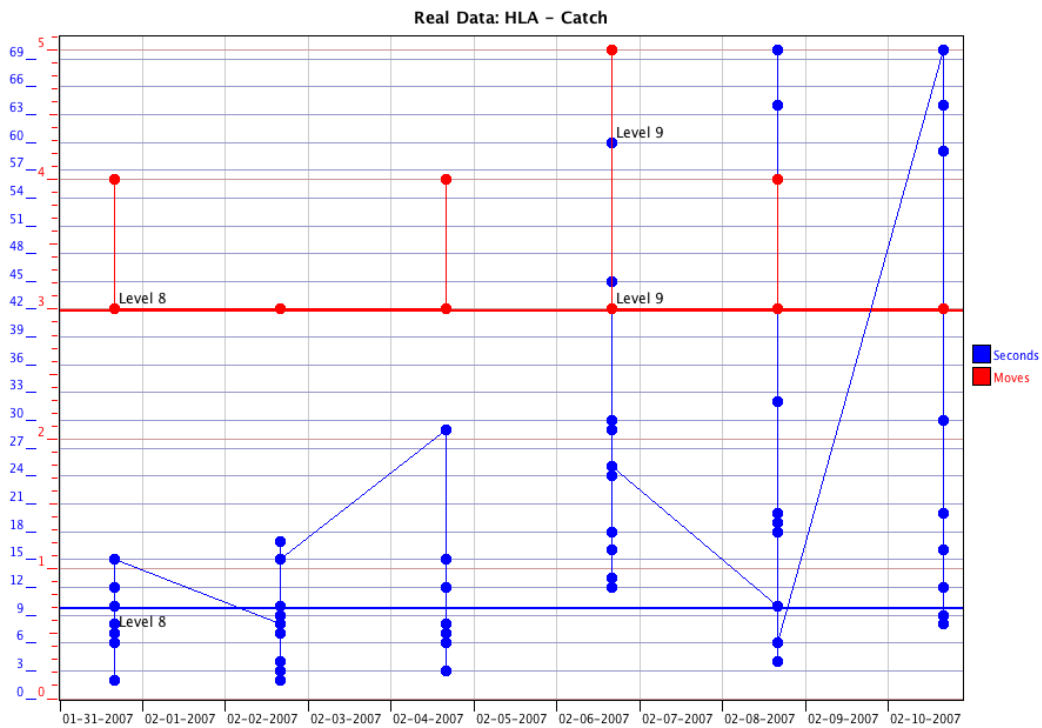


Figure 9: Graph of Progress

description in the graph title. For example, if you have created a graph for **Stoplight** that uses trial number instead of date as the horizontal axis, you may wish to call it *Stoplight - By Trial*.

Note:

In the current version of *Client Manager* you cannot “**Save As**” to save a copy of your graph and retain the original graph settings. If you save a graph with a new name, the graph settings with the original name are overwritten.

You may wish to fine-tune the graph by changing the way the data is presented for one or more variables. You can make changes to a variable’s title, color, and labels by using the **Edit Axis** window, as shown in Figure 10. You can also add a target line for a variable.

To edit the way the horizontal axis is presented, click the button in the **Horizontal** box. To edit a variable on the vertical axis, double-click the variable name in the **Vertical** box or highlight it and click the **Edit** button below.

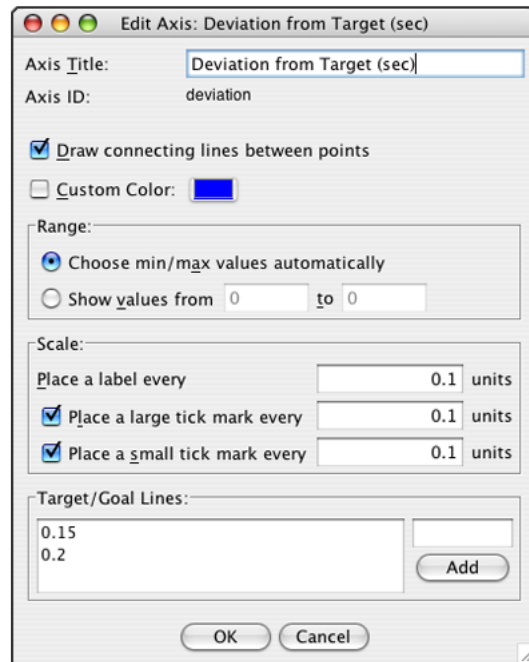


Figure 10: Edit Axis Window

You can view the raw data and export it to a spreadsheet for further analysis by clicking on the **Data Table** button, as shown in Figure 11. You can save the data by clicking the **Save as CSV** button. It will be saved in a comma-delimited format which is readable by most spreadsheet programs.

Level	Date	Deviation from Target (sec)
10 Seconds	02-08-2007	0.04
10 Seconds	02-08-2007	0.26
10 Seconds	02-08-2007	0.12
10 Seconds	02-08-2007	0.39
10 Seconds	02-08-2007	0.02
10 Seconds	02-08-2007	0.32
10 Seconds	02-08-2007	0.58
10 Seconds	02-08-2007	0.46
10 Seconds	02-08-2007	0.12
10 Seconds	02-08-2007	0.08
10 Seconds	02-08-2007	0.46
10 Seconds	02-08-2007	0.25
10 Seconds	02-08-2007	0.43
10 Seconds	02-08-2007	0.22
10 Seconds	02-08-2007	0.11
10 Seconds	02-08-2007	0.24
10 Seconds	02-08-2007	0.38
10 Seconds	02-08-2007	0.2
10 Seconds	02-08-2007	0.23
10 Seconds	02-08-2007	0.04
10 Seconds	02-08-2007	0.18

Figure 11: Raw Data Panel with Save as CSV option

2.4 Services Summary

Services summaries may be generated and sent to insurance companies, either as a bill or as a progress report on the client's most recent sessions. You can generate a services summary in one of two ways:

- In the main *Client Manager* window, select a client. Then open the **Client** menu and select **Services Summary**.
- Double-click a client in the main window. Click the **Services Summary** button in the lower-right corner.

Services Summary: Clark, Patricia

Sally Provider, MA CCC-SLP,
The Speech and Language Clinic
2234 Main St
Columbus, OH 43210
(800) 777-3166

Notes:
Send to Medicare first then secondary insurance.

Client Information:
Client: Patricia Clark
Birthdate: 12-21-1929
Referring Physician: Dr. Kingston
Date of Evaluation: 01-25-2007
First Day of Therapy: 01-30-2007
Prognosis: Client is expected to continue to improve.

Print?	Date	CPT Code	Units	Unit Charge
<input checked="" type="checkbox"/>	01-25-2007	92506 - Evaluation of Speech/Language	1.0	\$200.00
<input checked="" type="checkbox"/>	01-30-2007	92507 - Speech/Language Therapy	1.0	\$120.00
<input checked="" type="checkbox"/>	02-01-2007	92507 - Speech/Language Therapy	1.0	\$120.00
<input checked="" type="checkbox"/>	02-15-2007	92507 - Speech/Language Therapy	1.0	\$120.00
<input checked="" type="checkbox"/>	02-16-2007	92507 - Speech/Language Therapy	1.0	\$120.00
<input checked="" type="checkbox"/>	02-16-2007	92507 - Speech/Language Therapy	1.0	\$120.00
<input checked="" type="checkbox"/>	02-19-2007	92508 - Group	1.0	\$50.00
<input checked="" type="checkbox"/>	02-19-2007	92507 - Speech/Language Therapy	1.0	\$120.00

Total: \$970.00

Print date header as: 01-25-2007 to 02-19-2007

Include sessions:
 Summary
 Abbreviated
 Full

Figure 12: Services Summary

A typical **Services Summary** window is shown in Figure 12. Unlike other windows in *Client Manager*, the **Services Summary** window does not allow you to change many of the fields that are displayed. Client and insurance information must be changed using the **Client Profile** screen. Information is shown on this screen for validation purposes. Notes will be saved for the next time you generate a Service Summary. Changes to CPT codes, Units, and Charges will be remembered. When you **Create Report** all of the information on the screen, plus some additional information, is captured in a document that can be opened later, edited, and saved.

The client's entire session history will be listed in the table in the bottom half of the window. Sessions that are to be included in this services summary will have a check mark next to them under the **Show?** column. To include a session in this summary, make sure it is checked. If you want to leave a session off, clear its check box. The **Dates from/to** boxes will update automatically to reflect the range of sessions you have selected.

Rather than check each individual box, you can select a range of sessions with the Shift key, and click the **Show Selected** or **Hide Selected** buttons to check or uncheck all of them at once.

For each session, you should specify a CPT code, the number of units (hours) for that session, and a charge per unit. Client Manager will automatically calculate the total bill and display the total at the bottom.

Finally, you may include all your session notes with your services summary. To do this, turn on the **Include Sessions** checkbox and select the type of session report you want. The different types were explained earlier in section 2.2.3.

When you are finished, click the **Create Report** button to generate your services summary. *Client Manager* will prompt you for a place to save the summary, and will open it in your preferred word processing program. From there, you may edit the summary further, or print it.

2.5 Preferences

Return to the main *Client Manager* screen. Click on the **File** menu and select the **Preferences** option. The **Preferences** window is where you choose options and fill out your professional information. The first tab, **Settings**, as shown in Figure 13, contains options affecting the operation of *Client Manager*.

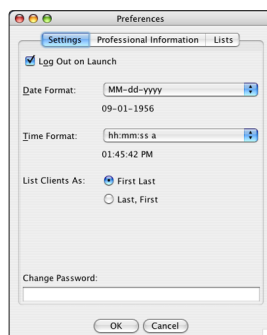


Figure 13: Settings Tab in Preferences Window

There are several options available to you:

Log Out on Launch will cause *Client Manager* to automatically log out whenever you start playing a game. This is to prevent unattended clients from closing the game and accessing private medical records.

Date Format allows you to change the way *Client Manager* displays dates. This change takes effect everywhere in *Client Manager*—dates that appear in lists, in the client profile, and on printable reports will all be affected. The default is MM-dd-yyyy.

Time Format allows you to change the way *Client Manager* displays times, in much the same way you can set the date format. The default is hh:mm:ss a/p.

List Clients As allows you to specify how clients are listed in the main window — you can choose to sort them by either first name or last name.

Change Password resets your password to whatever you type in the box. If you forget your password, contact us at LocuTour Multimedia using the contact information on our website⁴, or call us at 800.777.3166 and we will help you reset your password.

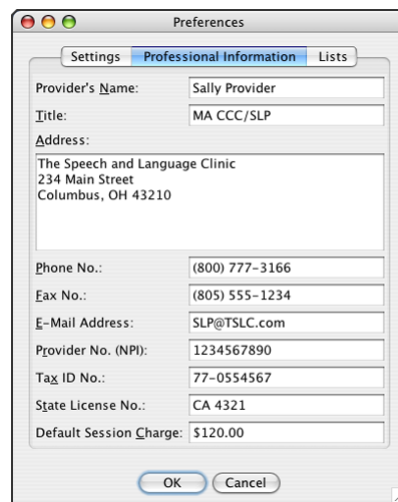


Figure 14: Professional Information Tab in Preferences Window

Now click on the **Professional Information** tab, as shown in Figure 14. This is where you fill in professional information about yourself as a medical care

⁴www.locutour.com

provider. There are fields for your name, title, business address, business phone number, fax number, e-mail address, provider number, tax ID number, state license number, and a field for your default charge per session. All of this information will be printed on each Services Summary you print. Note: The Services Summary uses the information on this screen to calculate the charge for each client session. If there is no default charge when the session is started then *Client Manager* will not calculate a charge for the session. Similarly, if you change the session charge *Client Manager* will not change the charges for sessions before the change was entered.

Now click on the **Lists** tab, as shown in Figure 15. This tab collects all of the drop-down boxes in one place for easy editing. You can edit the values in the drop down boxes for ICD Codes, CPT Codes, and Prognosis.

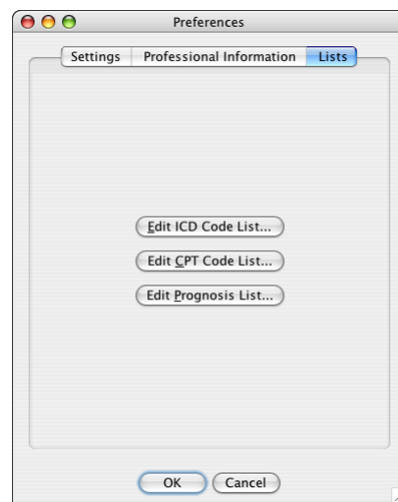


Figure 15: Edit Lists Tab in Preferences Window

2.6 Help

There are three ways of getting help and information about LocuTour Multimedia's *Client Manager*. First, you may read this manual in printed format. Second, you may access this manual on your computer by clicking the **Help** menu and selecting **Help Contents**. Third, you may log on to LocuTour Multimedia's website by opening a browser and visiting www.locutour.com. You may also access the website directly by clicking the **Help** menu and selecting **Website**.

2.7 Conclusion

Congratulations! That's all you need to know to effectively use *Client Manager* to keep track of your clients. As you collect more data, you will see how easy it is to manage all that information. The rest of this manual is dedicated to exploring each *Client Manager* feature in-depth. If you have any questions or concerns that are not addressed in this manual, feel free to contact LocuTour Multimedia via our website, or call us at 800.777.3166.

3 Clients

There are two ways to create Client Profiles. You may click the **New** button in the main *Client Manager* window and fill out a profile window, or you may launch a game and play it as a guest. Any record returned from a LocuTour Multimedia game without a corresponding *Client Manager* client profile will be placed under a new client named "Guest". The guest client is stored and tracked like any other *Client Manager* client. You can rename the Guest client later if you wish.

You may rename a client at any time by opening their client profile, changing the name fields, and clicking **OK**. This will change that client's name everywhere it appears within *Client Manager*.

You may remove any client by selecting the client's name in the main *Client Manager* window and clicking **Remove**, or using the **Clients** menu item **Remove Client**.

Warning:

Client removal is **permanent**. All information for that client will be deleted and will not be recoverable. It is probably a good idea to leave all of your clients in the program for archival purposes, even if you do not plan to use that profile again. There is no limit to the number of clients that may be managed by *Client Manager*. Storing large numbers of clients **will not** slow down *Client Manager* and takes up very little room on your hard disk.

You may also remove individual sessions from a client, and individual reports from a session. These changes are also permanent, and should only be made if you are sure that you do not want to keep that information.

3.1 Advanced: Combining Session Records

You may often play multiple games with a client during a therapy session. If you accidentally start a game from the main *Client Manager* screen (rather than the session window), that game's records will go into a new session record (and not the session you're working on). You may wish to combine (or "merge") all these session records into one.

To do this, first select all the sessions you wish to combine. You may select individual sessions by holding the **Ctrl** key on your keyboard and clicking each one individually. Or, you can hold down the **Shift** key to select a range of sessions.

Once you have selected your sessions, open the **Session** menu and click **Merge Sessions**. All but the first session you selected will be removed, and the first session will be highlighted. That session now contains all of the data from the sessions you selected earlier.

3.2 Advanced: Backing Up or Transferring Clients

It is usually a good idea to leave inactive client profiles intact in *Client Manager*. You can however, move inactive client profiles to a location where they will not be read by *Client Manager*. The same process can be used to make a backup of client profiles and store them in a safe place (or transfer them to another computer running *Client Manager*).

3.2.1 Performing System Backups

On the Mac, *Client Manager*'s data is stored in `UserName ⇒ Library ⇒ Preferences ⇒ LocuTour Multimedia ⇒ Client Manager`. Copy this folder to backup your data or transfer it to another computer.

On Windows its a little more complicated because the data folder is hidden from non-admin users. It is found at, `C: ⇒ Documents and Settings ⇒ User Name ⇒ Application Data ⇒ LocuTour Multimedia ⇒ Client Manager`.

3.2.2 Archiving a Client

To create a backup of a particular client (called a **client archive**), select the client in *Client Manager*. Then open the **Client** menu and choose **Archive Client**. *Client Manager* will ask you where you want to save the archive. When you click **Save**, *Client Manager* will compress and store all of that client's information to the file you specified.

You may save this file or transfer it to another computer. It contains all information about that client, including any documents or graphs you might have saved in the client's folder.

3.2.3 Restoring a Client

To restore a client, open the **Client** menu and select **Restore Client**. Select the client archive you saved earlier and click **Open**. *Client Manager* will restore the client.

If you already have a client with the same name in *Client Manager*, *Client Manager* will ask if you want to merge the archived client with the client you already have. If you allow *Client Manager* to merge, it will add any new sessions and saved files that are in the archive, but not in *Client Manager*, to the already-existing client.

4 Saving

Client Manager automatically saves information whenever you close a data-entry window. Data collected from other LocuTour Multimedia products is automatically saved every time you run *Client Manager*. Generally, clicking **OK** in a window will save any changes you have made. If you click **Cancel**, or close a window by clicking the close button in its title bar, *Client Manager* will ask you if you want to save.

There is a **Save** option under the **File** menu that will save everything that has been changed in *Client Manager* since the last save. However, this is rarely necessary since most saving happens automatically.

Warning:

Client Manager depends heavily on its file structure on the hard drive to operate. Do not move or alter the *Client Manager* folder or any of its sub-folders on the hard drive, or *Client Manager* may operate unpredictably.

5 Printable Reports

Printable reports can be used to maintain a hard-copy archive of important information, or provide information to others (such as insurance companies)

in a physical format. *Client Manager* can generate several types of printable reports, including:

- Client profiles (Name, address, insurance information...)
- Services summaries (“Bills”, list of sessions attended, ...)
- Sessions (SOAP Notes, including Full, Summary, and Abbreviated reports)
- Individual game reports (Raw data—Dates, levels, ...)

To generate a printable report, open the relevant window in *Client Manager* and click the **Create Report** button. *Client Manager* will ask you where to save the report and save it in Rich Text Format (.rtf). You can then open it in your favorite word processing program, review, edit, and print the report from within your word processor.

5.1 Notes

Some windows have a **Notes** field with a **Print Notes** checkbox next to it. If the **Print Notes** checkbox is checked (as it is by default), the notes you type there will be included in the printable report. However, if you enter observations or other private notes, you may uncheck this checkbox to prevent the notes from being included in any printable reports.

5.2 Session Reports

When saving a printable session report, you have three choices. Your choice only applies to the data included in the Session Report. It does not affect the data that is retained by *Client Manager*. The choices are explained briefly below:

Full Includes a session summary sheet with a list of games and SOAP notes, followed by a full printout for each game played during that session.

Summary Includes only the session summary sheet, which has a list of the games played and the session SOAP notes.

Abbreviated Includes a session summary sheet, followed by a set of abbreviated reports (which include just the final results information and the date for each report). In most cases, abbreviated reports are the

same as full reports—including the SOAP notes. However, games may choose to provide additional information on a full report that is not included in an abbreviated report.

Graphs Graphs are not printed with the session reports. Follow the instructions in section 2.3 for creating and printing graphs.

A Troubleshooting

A.1 “No Games Installed” appears in the Game menu.

This occurs when *Client Manager* is not aware of any *Client Manager*-enabled games. If you know you have a *Client Manager*-compatible game installed, you should inform *Client Manager* of its existence by doing the following:

1. From the main *Client Manager* window, select **Game** ⇒ **Search Computer for Games**.
2. *Client Manager* will begin searching your hard disk for compatible games. When it finds a game, it will display a message informing you of this.
3. After *Client Manager* has completed its search, your game should appear in the **Game** menu. If it does not, see section A.2.

A.2 My game is not in the Launch Game Menu.

This occurs when *Client Manager* does not have a game plugin for your game, or the game has moved or been deleted from the hard drive. There are two possible solutions, which you should try in the order listed:

1. Reinstall the game. It is possible that some game files were moved or corrupted.
2. Add the game again to *Client Manager*.
 - (a) From the main *Client Manager* window, select **Game** ⇒ **Add Game**. *Client Manager* will ask for the location of the game.
 - (b) Browse to the place where the game is installed. On Windows, it is usually in a folder that is somewhere inside **My Computer** ⇒ **C:** ⇒ **Program Files**. On the Mac, it is usually in **Applications**.

A.3 I played multiple games during a single therapy session, but they show up as multiple sessions in Client Manager. **TROUBLESHOOTING**

- (c) Inside the game's folder, there will be a number of files, only one of which can be selected. On Windows, this will be a file with a name ending in `.jar`. On Mac, this will be the game application itself. Select that file and click **Open**.
- (d) *Client Manager* should automatically log out and back in. Check the **Game** menu to see if your game appears.

If neither of these two alternatives correct the problem, chances are there is a problem with *Client Manager* or the game itself. Please contact LocuTour Multimedia or the company that produced your game for assistance.

A.3 I played multiple games during a single therapy session, but they show up as multiple sessions in *Client Manager*.

Client Manager can start games in two different ways. Games can be started from the main window, or from a session window. If you start a game from the main window, the game will always be recorded in a new session.

To ensure your games get recorded in the correct session, you should always start games from the session window. Only start games from the main screen when you know you want the game to be recorded in a new session.

If you have already played multiple games, and want to merge them into a single session, see section 3.1.

A.4 Clients are missing from the client list.

If an internal or operating system error corrupts *Client Manager*'s data (such as moving or deleting any files in *Client Manager*'s folder on the hard drive), *Client Manager* may be unable to display clients. If you have made any changes to *Client Manager*'s folder, quit *Client Manager* and undo those changes. Then, restart *Client Manager* and see if the missing clients have returned. If they have not, contact LocuTour Multimedia for further assistance.

A.5 I forgot my Client Manager password.

Contact LocuTour Multimedia for help in resetting your password. Write your new password here:_____

A.6 Help menu items do not work.

Client Manager uses your default Internet browser to launch its help information. If you do not have a default browser, or do not have any browsers installed, or if your operating system does not provide the location of your browser to *Client Manager* (this is often the case in Microsoft Windows 98 and earlier), then **Help** menu items may not work. All documentation listed in the **Help** menu is included on the *Client Manager* CD, and may also be accessed through the Start Menu or on the hard drive in *Client Manager's* installed directory.

A.7 Where can I find ICD and CPT codes?

International Classification of Diseases codes can be found at <http://www.cdc.gov/nchs/dataawh/ftpserv/ftpicd9/ftpicd9.htm>.

CPT codes are harder to find since they are controlled by the AMA. The ASHA web site has a list of Medicare covered CPT codes in Adobe Acrobat format at <http://www.asha.org/members/issues/reimbursement/medicare/analysis-2007mfs.htm>.

A.8 The tables in the reports I create don't look right.

If you are using Mac OS 10.3, you will need to use a program other than TextEdit to view the reports you create. TextEdit on 10.3 and earlier does not support tables and displays them incorrectly. Use a word processor such as OpenOffice or Microsoft Word to view and print your reports. OpenOffice is available freely from <http://www.openoffice.org/>.

A.9 Other Problems

If you encounter any problems not described in this manual, please contact LocuTour Multimedia or visit our website at <http://www.locutour.com/>.