## **NPAWorks Daylite Instructions**

Logging onto Daylite Mobile											
	First	Lo	g-In								
1.	Open <u>Safari</u> , type in the following: <u>https://essc.codemetro.com/mobile</u>	Do not use Daylite App									
2.	<ul><li>Bookmark site by clicking on the icon at the right and choosing "Add Bookmark"</li><li>Choose location to save</li></ul>										
3.	Type in username/password and click Log In	<ul> <li>Username: firstname.lastname</li> <li>Password: your password</li> </ul>									
4.	Click <u>Allow</u> on pop-up message regarding location										
5.	Once logged in, your screen will be a monthly calendar view	Looked through:						Today C < >			
			<b>S</b> 29	M 30	T 31	W 1	T 2	F 3	<b>S</b> 4		
			5	• •	?	8	9	10	11		
			12	13	14	15	16	17	18		
			19	20	21	22	23	24	25		
			26	27	28	29	30	1	2		
			-	_		(	Copyright 🛛 Code	Metro, Inc. All rig	hts reserved.		
1	Subseque	ent	: Log	-Ins							
	Open Safari and click on saved bookmark										
2.	Type in username/password and click Log In	•			-		e.last sword		e		

Dow	nloading Schedule							
Downloading a schedule at the start of the week, as well as re-downloading daily, will ensure faster access to a schedule and keep it updated in the case that changes occur								
	Start of Week							
<ol> <li>Click on the <u>Work Offline</u> button at the top right of the calendar</li> </ol>	Should be completed prior to first session of the week							
2. Select date to download and click OK	Maximum number of days that can be chosen is 1							
3. Data will begin to download								
S	tart of the Day							
1. Click on the <u>Work Offline</u> button at the top right of the calendar	Should be completed prior to first session of the day							
2. Choose today's date and click "Ok"								
	End of the Day							
<ol> <li>At end of day, click on <u>Work Online</u> and choose <u>Upload All Appointments</u></li> </ol>	<ul> <li>Make sure you have an established internet connection</li> <li> <b>DayLite OFFLINE MODE Locked through: 09/01/2014 by WORK ONLINE Staff al December 2014 Total Colored to a stablished internet OFFLINE MODE Locked through: 09/01/2014 by WORK ONLINE Staff al December 2014 Total Colored to a stablished internet Upload Options Streen will appear Upload Options Before you can work online, you will need to upload the appointment changes that are currently saved on your device. more <b>Setect an option Upload all appointments on your device. more Save changed appointments to NPAWorks, but keep them downloaded. More Once you've made your selection, click "OK." Source now working online again. Appointments with the i</b> icon are rendered and uploaded to NPAWorks. <b>Optiments with the i</b> icon remain downloaded to your device. <b>Optiments with the i</b> icon remain downloaded to your device.</b></li></ul>							

Viewing a	a Schedule									
1. Click on the date you wish to view your schedule	• Dates that are <b>bolded and blue</b> indicate there are scheduled appointment(s)									
2. All scheduled appointments will load either to the right (for desktop users) or bottom of	DayLife         tells         tells <thtells< th="">         tells         tells         <t< th=""></t<></thtells<>									
the screen (mobile users)	S         M         T         W         T         F         S         B000 Pmin 2000 (2000 Pmin 2000 Pmin 2000 (2000 Pmin 2000									
	12         13         14         15         16         17         18           19         29         21         22         23         24         25									
3. Click on each appointment to learn more about the individual appointment	<ul> <li>Review the duration of appointment</li> <li>Click on <u>Office Notes</u> to learn more about the appointment and any potential instructions for the appointment (e.g., Relias training, overlap information)</li> </ul>									

	Capturing Caregiver Sig	gnature at End of Session
1.	At the end of session, go into Daylite and locate the corresponding appointment in your calendar	
2.	Click on <u>edit icon</u> to the right of participant appointment	Mon Jun 6, 2016
3.	Scroll down at click on <u>Guardian</u> <u>Verification</u>	Guardian Signature: Guardian Verification
4.	Choose a name and relationship from the dropdown menus	If parent/guardian name is not in the drop down list, there is a blank selection where you can type the name of the person signing as well as can add the relationship Name: TEST TEST TEST Relationship: GRANDMOTHER
		Comments: Enter your comments

5.	Present device for caregiver to sign in the box labeled <u>Signature</u>		Guardian Verification ×	
			Signature:	
			Client:         Velez, Casey           Date:         06/03/2014           Time:         08:00 AM - 09:00 AM           Location:	
			Name:	
			Velez, Jonathan	
			Relationship:	
			Mother	
			+ Report Different Time	
			I confirm that the services provided at the location, date, and time shown are true, correct, and complete.	
			Cancel Clear Signature Verity	
6.	If session time is different from scheduled	•	Add note in <u>office notes</u> indicating	
	time		difference in time	
		•	Collect guardian signature	
		•	Email update to scheduling	
		•	BI render session when appointment has	
			been updated	

	Capturii	ng Associa	te Signature	at End	of Session
7.	At the end of session, go into D locate the corresponding appoi your calendar	•			
8.	Click on <u>edit icon</u> to the right of appointment	<sup>r</sup> participant	1	02.001 m	16 Client: Smith, Joe Address: 1234 Apple Dr.,
9.	Scroll down and click on <u>Sign</u> ne Therapist Signature	ext to	Therapist Signature:		✓ SIGN
10.	Sign your name with your finge <u>OK</u>	r and click	-	Therapist Signature Signature Confirm that the service and complete.	s provided at the location, date, and time shown are true, correct.
11.	If session time is different from	scheduled			otes indicating difference in time
	time		<ul><li>Collect gua</li><li>Email upda</li></ul>	-	
					hen appointment has been updated
		Renderi	ng Participan	nt Sessio	ons
	**Only render sessions if th	-	rate- send an N ession needs up	-	ate to your scheduler as needed if *
1.	Click on <u>edit icon</u> to the right of participant appointment	• Mon Jun 6, 2 02:00 PM 05:30 PM	•		
2.	Check box where it says "Service Rendered/Complete"	Constant Constan	Si Start	Nature: Overlap	Halds Matchell     Cape CA       Insurance Billing     Image CA       Image Cape CA     Image CA       Image CA

3.	Click <b>"Save"</b> on top right	- 🦓 🏔	DayLit	9	_	_				H	llo Michelle! 8	ign Out	
	corner	Update Appointment											
		Cancel										Save	
			General		Adv	anced		Service		Inst	vrance Billing		
		Servic	e Rendered /	Ø				Status:	Overlap			•	
			Completed: At/Near:	06/03/2016 01:3									
			Date:	User didn't replie	d to Geolocation of	-		Start/End:	02:00 PM	Ø	05:30 PM	0	
			Client:	Smith, Joe				Location:		pple Dr. Santa			
			Subject: Duration:	3.50 Hrs				Service: Service Time:	0		Minutes Sy		
			Pay Code:	Regular		٤	•	Travel Mileage:	0.00		Mile		
		Therapi	st Signature:					∕ sign					
		Guardia	in Signature:					Guardian Ver	rification				
		+ om	e Notes:								68 of 100	2	
		+ Activ									0 of 250		
		+ Res	ults:								0 of 250	0	
4.	Your participant session		DayLite		_	_	-	_	-	н	ello Michelle! 8	Bign Out	
	should now appear to be	Locked through	CAESSC	/ Staff							WORK OFFLINE	LOCK	
	dark green			CHERT									
	dank green	June 2016		_		_			Mon Jun 6,	2016	0		
		S	м	T	w	T	F	S	02:00 PM 05:30 PM	Client : Smit Address: 12	h, Joe 34 Apple Dr.	<b>1</b> 6	
		29					2		05:30 PM				
		29	30	31	1.	2	3	4					
		5	6	7	0		10						
		5	6	7	8	9	10	11					

	Lockin	g Sc	he	du	ıle					
1.	Click Lock on top right corner	Locked fr	Holio Micheliet Sign Ouf							
		June 2016 C C > M						Mon Jun 6, 2016 🥡 < 🕥		
		S	ŀ	i.	T	W	T	F	5	02:00 PM Client: Smith, Joe 🖌 🖸 05:30 PM Address: 1234 Apple Dr.,
		29	3		31	1	2	3	4	
		5	6		7	8	9	10	11	
2.	Select date you wish you lock for	•	10 Re	0% fer	5 aco	cura the	te mor	ithly	NPA	your schedule is A & <i>Timekeeping</i> rrect lock date
3.	Click "I affirm this statement"									
4.	Lock date will appear on top left corner of									
	your screen									