



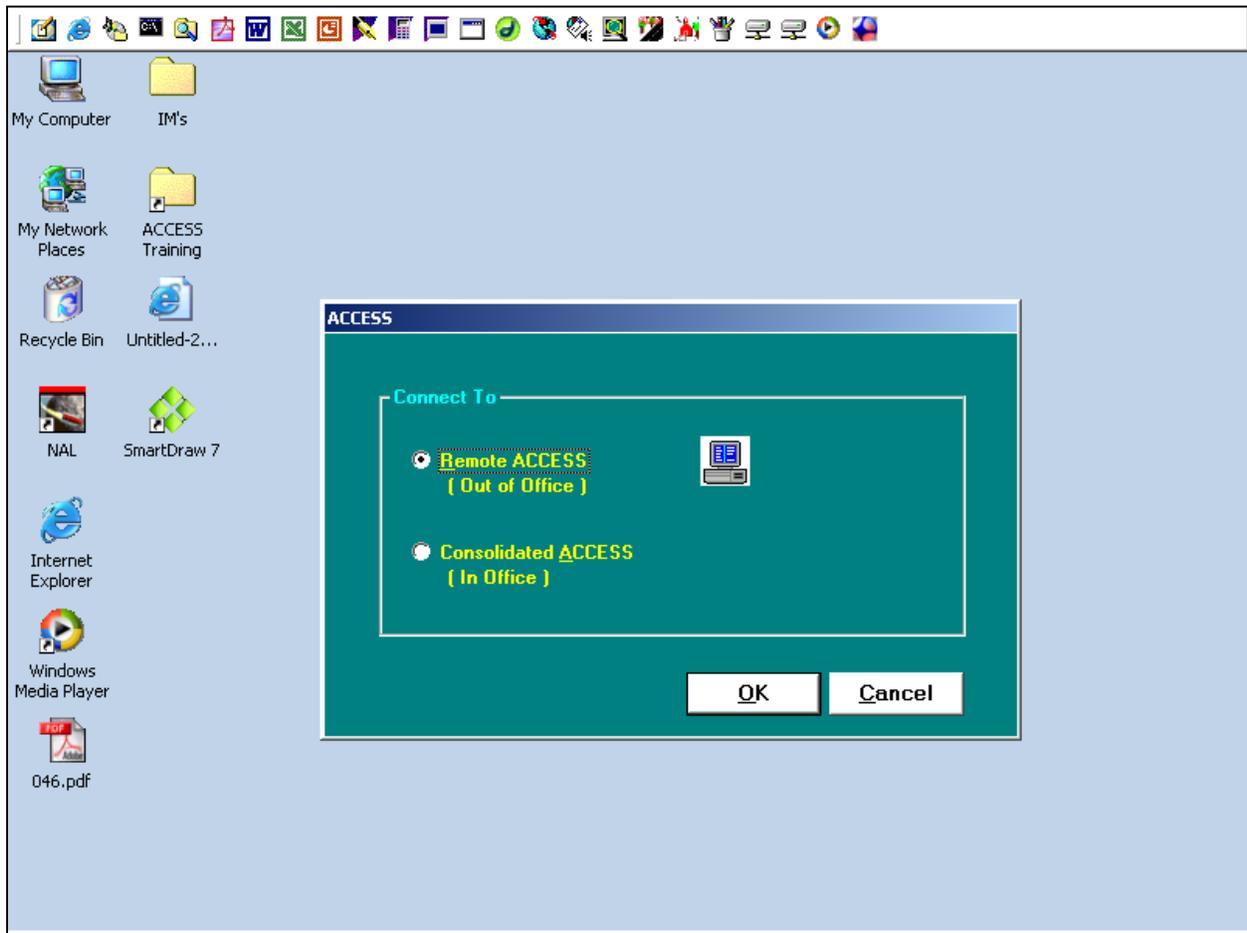
# Laptop Basics

## Definitions:

- Remote ACCESS (Out of the Office): This option should be selected when using the laptop. Users will not have the ability to enter consolidated ACCESS when in this mode. Only those cases the worker has downloaded to the laptop will appear when connected in this mode. This option should also be used when the user is in the office and wishes to check out data.
  
- Consolidated ACCESS (In the Office): This option should be selected when a worker is in the office and the laptop is docked. ACCESS will run as it normally has. When this option is selected, users will be able to view and use all consolidated ACCESS data.
  
- Download: The process of checking out data to the laptop.
  
- Synchronization: When checking out data and checking data back in, you will receive a pop-up box labeled ACCESS Synchronization. The data, or components you are checking out or checking in is either being downloaded to the laptop or being uploaded to the database.
  
- Docked: Your laptop is in the docking station.



To check out data from Oregon ACCESS to the laptop, double click on the ACCESS icon and choose Remote ACCESS, even though you are in the office and your laptop is docked.



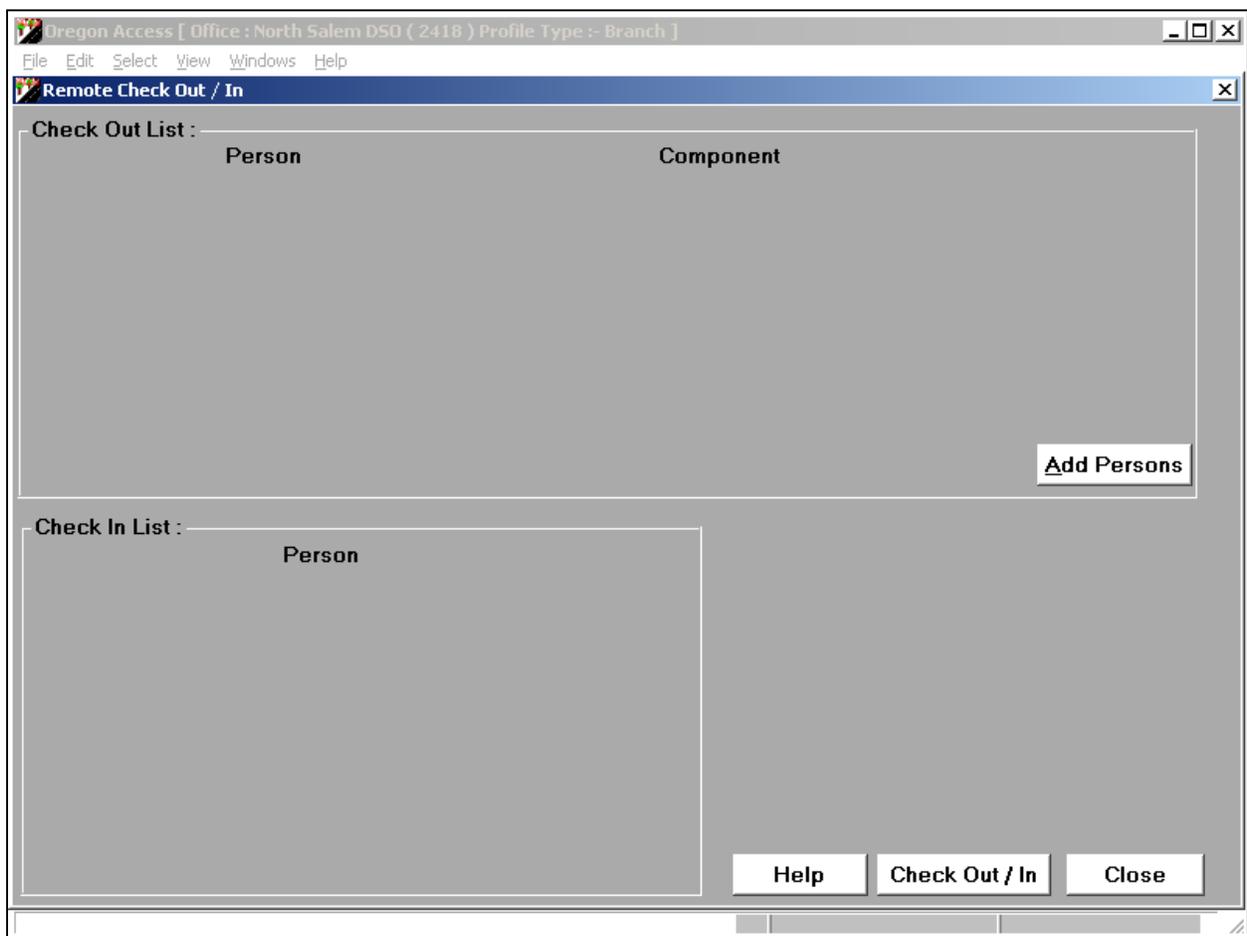
You must have your laptop docked to check out data. Click OK and then log into ACCESS using your RACF ID and password. You will then be logged into ACCESS in remote mode.



Click on the Lightning Bolt icon in the upper left-hand corner of the toolbar.



This will bring you to the Remote Check Out/In screen. Initially this screen will be empty.





## Checking Out ACCESS Data

You must first click the Add Persons button to check out data. This will display all clients assigned to the worker. Click on the person(s) you wish to check out. You may pick more than one person from this screen. If the list is extensive, you may type the person's last name in the search field.

Oregon Access [ Office : North Salem DSO ( 2418 ) Profile Type :- Branch ]

File Edit Select View Windows Help

Remote Check Out / In

Check

Checkout Persons selection

Worker: Worker, Sample (RACF ID)

Last Name Search:

Last Name	First Name	MI	SSN	Prime Nbr
A	CLIENT	K	123-45-6789	XXX1111X
B	CLIENT		123-45-6789	XXX1111X
C	CLIENT	C	123-45-6789	XXX1111X
D	CLIENT		123-45-6789	XXX1111X
E	CLIENT	W	123-45-6789	XXX1111X
F	CLIENT	F	123-45-6789	XXX1111X
G	CLIENT	L	123-45-6789	XXX1111X
H	CLIENT	L	123-45-6789	XXX1111X
I	CLIENT	F	123-45-6789	XXX1111X
J	CLIENT	R	123-45-6789	XXX1111X
K	CLIENT	M	123-45-6789	XXX1111X
L	CLIENT	G	123-45-6789	XXX1111X
M	CLIENT	A	123-45-6789	XXX1111X

Check

Help OK Cancel



Note: Searching will only take you to that line item. You must click on the name to select that person to check out.



After persons are selected, click OK to be brought back to the Remote Check Out/In screen with a list of those persons chosen. The upper half of the screen shows the person, with all their components (cases, screenings, assessments, etc.), available for the worker to choose the components that need to be checked out to the laptop.

Person	Component	
G. CLIENT	Case	<input type="checkbox"/>
	Assessment : Title XIX (Current)	<input type="checkbox"/>
	Assessment : Title XIX (Pending)	<input type="checkbox"/>

When any component (Case, RA, Screening), other than the assessment, is checked out the persons and all their related components are locked in consolidated ACCESS. New components for those persons can be created only in remote ACCESS, in the laptop that has checked out the data.

An Assessment may be checked out without the Case. When only the Assessment is checked out the Case/RA/Screening of the person may be modified in Consolidated ACCESS. The Case information in Client section may not be modified. The Case section will be view only if you do not check out the Case. New components (RA/Screening) may be created.

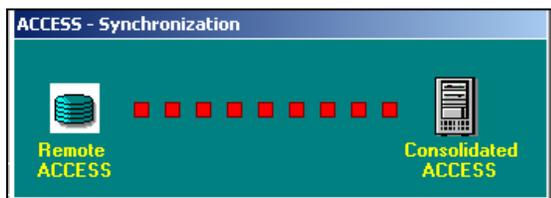


You cannot create a new assessment in consolidated ACCESS when one is checked out. The case may not be transferred, inactivated or archived.



Note: When a case is checked out in Remote ACCESS, all components which were checked out will be read only in Consolidated.

Using the check box at the top of the screen, indicate those components you wish to check out to the laptop by checking the box next to the component. Click the Check Out/In button. The Synchronization screen will be displayed.



When the synchronization process is finished, click the Close button. This will take you to the Main Menu with the list of your clients you checked out.

If you have checked out a client belonging to another worker, you will need to select that worker's name, or use Person Search to get to that person's component. You may now proceed with ACCESS as usual.



Note: If an assessment is checked out, then there is a need to checkout any other component(s) for the same person, the checked out assessment will need to be checked in first.



## Checking In ACCESS Data

You must have your laptop docked to check in data. Open Remote ACCESS, and click on the Lightning Bolt icon on the toolbar. You will be brought to the Remote Check Out/In screen.

**Oregon Access [ Office : Coos Bay Senior & Disabled Services (0611) Profile Type :- State DB : access\_remote ]**

File Edit Select View Windows Help

**Remote Check Out / In**

**Check Out List :**

Person	Component
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Add Persons

**Check In List :**

Person	
G. CLIENT	<input type="checkbox"/>

Help Check Out / In Close

The lower portion labeled Check-In List shows those persons that the worker has already checked out to the laptop. Indicate, by clicking the check box, those clients you wish to check back in. Click the Check Out/In button. The Synchronization screen will be displayed. When the synchronization process is finished, click the Close button.

Log out of Remote ACCESS and log into Consolidated ACCESS to work in the office.



If you are in Consolidated and try to look at a case that your or someone else has checked out you will receive a pop-up message letting you know that the case is not editable, with the exception of narration.



#### TIPS:

- To remove the laptop from the docking station, you must log out and shut down your computer.
- The synchronization process will take at least 30 seconds.
- You cannot move a case to Current while working in remote mode.
- A maximum of 20 components may be checked out at one time.
- Users can update the narrative for a "checked-out" person.
- When there is a new release of ACCESS, and you log into Remote, use your regular (current) RACF ID and password.