Qunote 3.0

Setup guide

v1 – June 2020

www.qunote.com

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GETTING STARTED

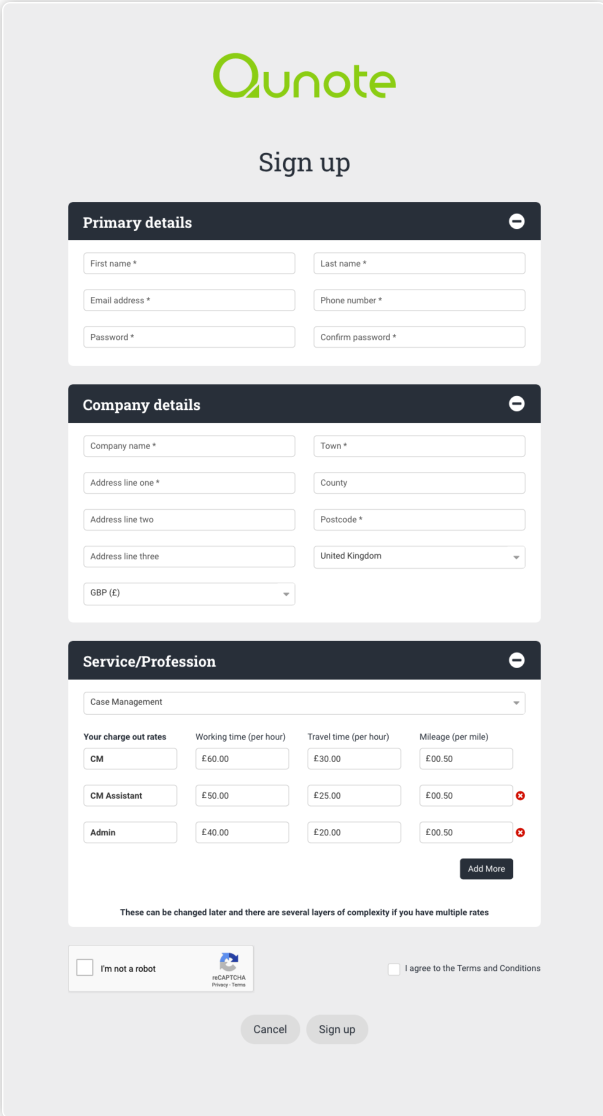
To register an account on the Qunote system, go to www.qunote3.net and click **Register for a free trial**.

Fill in the registration form with your company and contact details, and set your password. Under the 'Service/Profession' section of the form, choose your main service or profession from the drop down list. The option chosen will determine the default terminology and headings used in your system, but you will be able to customise these as required later on. Finally, the sign-up form allows you to input your standard charge-out rates for time, travel and mileage. Your rates can be amended later on, and you can add several layers of complexity if you have different rates for different clients.

Once you've finished entering your details, click the **Sign up** button to create your new account. Once your account is created, you will initially land on the home page dashboard.

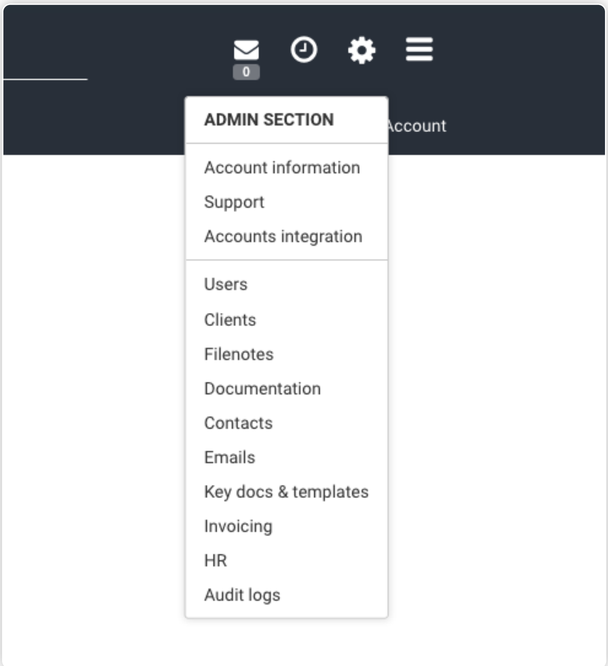
For a run-through of how to use the main day-to-day functions of the system, such as managing clients and contacts, entering clinical notes, generating invoices and running reports, please refer to our main User Guide, which is available to download at www.qunote.com/support.

This setup guide provides guidance on the different options for customising your system settings and preferences, and how to tailor the system according to your specific needs.



ACCESSING THE ADMINISTRATION AREA

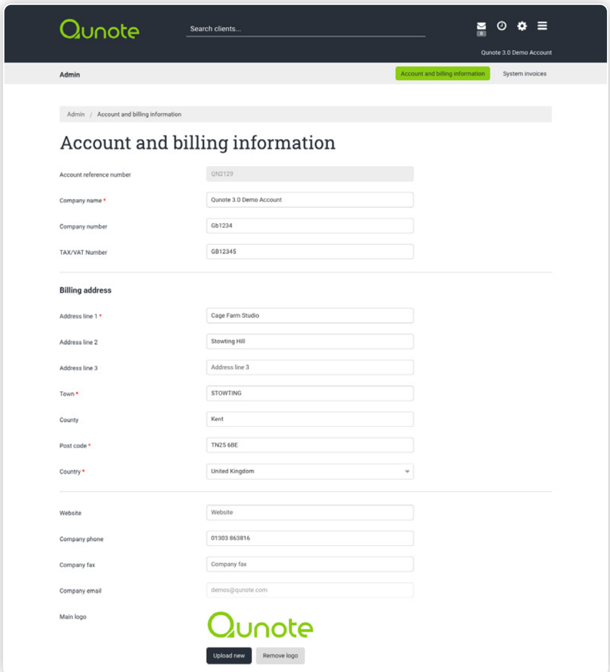
Your settings and preferences can be edited from the system administration area. To access the admin area, click the cog icon in the system header to display the admin menu. The admin area is separated into different sections covering each different module/area of the system.



ACCOUNT INFORMATION

From the 'Account information' section of the admin area, you can view and update your company and billing information.

The details that you enter on this page will be used by Qunote for the purpose of billing your account. They will also serve as the default information whenever you add a new set of 'Company and Bank' details to be displayed on invoices generated from the system (see **page 46** for further information) .



USERS

From the ‘Users’ section of admin area, you can view, add, edit and delete your account users, and organise your users into different user groups.

USER GROUPS

When adding users to the system, you’ll assign each to a user group. You can view and manage your different user groups by going to **Admin > Users > User groups**.

For each of your user groups, you’ll choose a default charge-out rate and set of system permissions. Then, when you assign a user to a user group, you’ll have the option of automatically applying the default charge and permissions set for user group to the individual user, though you can still set custom permissions for each user if necessary.

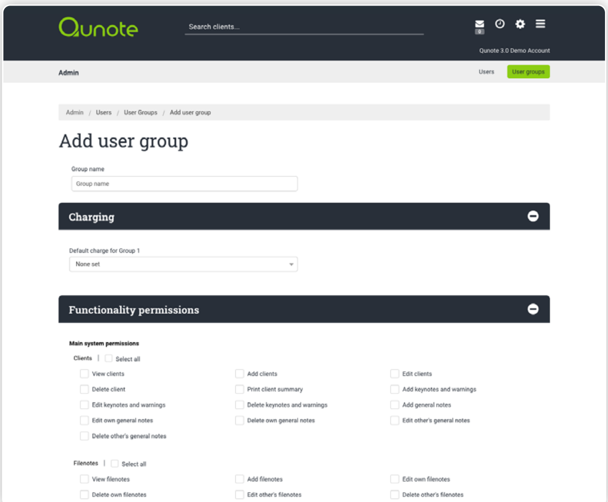
The number of different user groups and the way in which you structure these is completely up to you. Because user groups are based around system permissions, it often makes sense to set up user groups aligned with different job roles. For example, you might set up groups for ‘Management’, ‘Admin’, ‘Clinician’ and ‘Assistant Clinicians’, each with a different set of permissions based on parts of the system that users within the group will need access to. Alternatively, decide to structure your user groups based on supervisors (e.g. ‘Tracey’s team’, ‘Amanda’s team’ etc.) or location (e.g. ‘North West’, ‘North East’ etc.)

When you sign up to the system, two user groups will be automatically created for you: an ‘Admin’ group, and a group named after your main service (e.g. ‘Case management’, ‘Occupational Therapy’ etc.). Initially, both groups will have the same default set of permissions, so you should review these before assigning users to either group.

Adding a user group

To add a new user group, go to **Admin > Users > User Groups**, and click the green **Add user group** button in the top right of the page. When adding a user group, you’ll need to specify:

1. **Group name**
2. **Default charge rate:** Allows you to set a default charge rate for users in that user group. When a user within the group creates a new filenote, the ‘Charge’ field for the filenote will automatically pre-populate with the default charge set. For example, if you were creating a user group for ‘Assistant Case Managers’, you might set your ‘Assistant CM’ charge-out rate as the default for users within the group.
3. **Functionality permission:** Allows you to set a default set of permissions for users within the group. When you assign a user to the group, you’ll have the option of automatically applying the default permissions set for the group to the individual user, though you can still set custom permissions for each user if necessary.

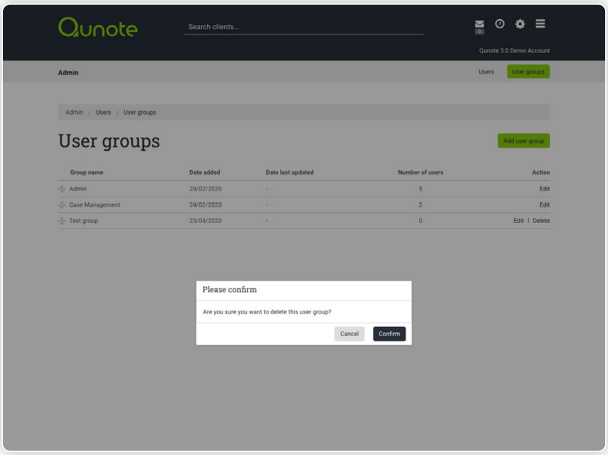


Editing and deleting user groups

You can edit or delete user groups from the **Admin > Users > User Groups** page using the **Edit** and **Delete** buttons on the right-hand side.

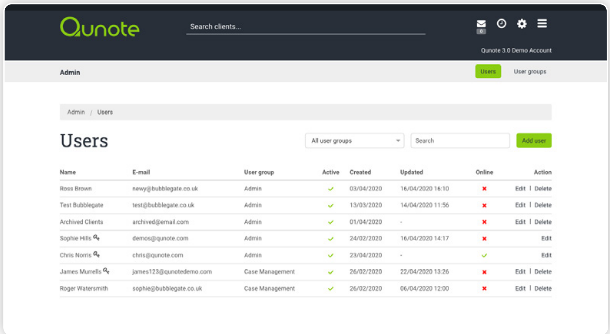
If you edit the default permission set for a user group, the changes will be automatically applied to any users within the group who have their permissions set to 'Use user group permissions'. They will not be applied to any users within the group who have custom permissions set specifically for them.

It's only possible to delete user groups that do not currently have users assigned to them.



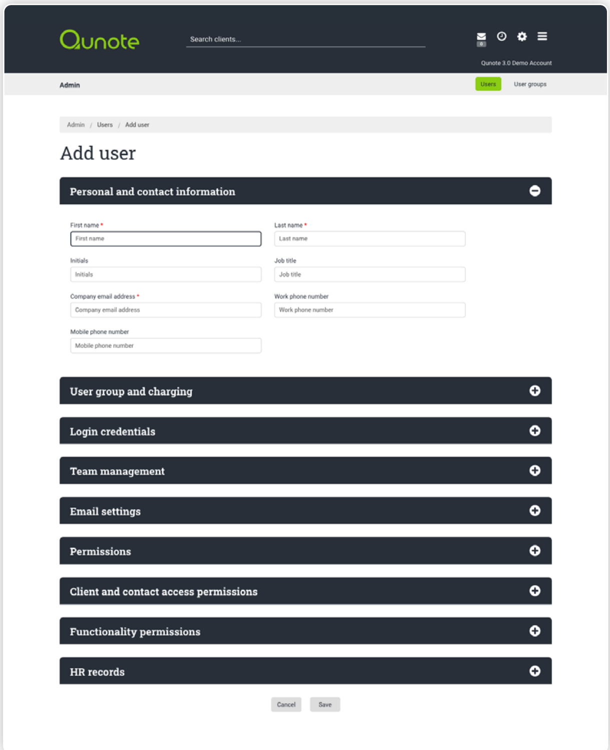
USERS

You can view, add and manage your system users by going to **Admin > Users**. You'll need to set up a user account for each member of your team that will need access to the system.



Adding users

To add a user, go to **Admin > Users**, and click the green **Add user** button in the top right of the page.



When adding a user, you'll specify the following information:

PERSONAL AND CONTACT INFORMATION

Specify the user's name, job title, telephone numbers, and company email address.

The company email address that you specify will serve as the user's username for logging into the system.

USER GROUP AND CHARGING

From this section, you can assign the user to a user group, and choose a default charge rate for the user.

When a user creates a new filenote, the 'Charge' field for of the filenote will pre-populate based on the default charge set for the user. If you set a user's default charge rate to 'As per user group default', when the user creates a new filenote, the 'Charge' field for of the filenote will pre-populate based on the default charge set for the user's group.

LOGIN CREDENTIALS

Set a password for the user, which they will use to login to the system. Once added, users are able to set their own password via the 'My Profile' page or by following the password reset process.

The 'Active' field in this section determines whether the user's account is active or inactive. Users will only be able to login to the system if their account is set as active.

TEAM MANAGEMENT

If the user you are adding is a manager or team leader responsible for supervising other users on your system, the 'Team Management' section allows you to customise the user's dashboard to display a list of those users they supervise and the clients assigned to each.

To display an individual and their clients on the user's dashboard page, simply tick their name in the list.

EMAIL SETTINGS

The section will only display once if you've enabled the 'Email to filenote' facility by setting a 'Company email alias' via **Admin > Email Settings**. For guidance on how to do this, please see **page 28**.

The 'Email settings' section relates to the 'Email to filenote' facility, which allows your users to send client-related emails directly into the system using a unique Qunote email address, and then quickly save these to the relevant client files.

All Qunote email addresses use the format:

[USER_ALIAS].[COMPANY_ALIAS]@qunote3.net

For example **joe.examplecompany@qunote3.net**

From the 'Email settings' section of the 'Add user' page, you need to specify the **[USER_ALIAS]** part of the address in the 'Email alias' field. How you format these aliases is up to you: you may choose to use each individual's full name as their alias (e.g. 'joebloggs'), their first name only (e.g. 'joe'), or perhaps their last name and first initial (e.g. 'bloggsj').

Once the user has been saved, the 'Email setting' section of their profile will display their full Qunote email address (joe.examplecompany@qunote3.net) and the user can start sending emails into their Qunote account using this address.

PERMISSIONS

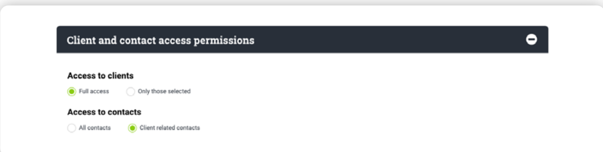
From this section, you can choose whether the user should have 'Super Admin' access.

Users with 'Super Admin' access will be able to access all clients and data held in your account, access all areas of your account including the administration area, and perform all actions, including changing your account settings and deleting data.

If you don't want the user to have access to everything, set the 'Super Admin' field to 'No'. You can then choose exactly which clients and functions the user should have access to via the 'Client and contact access permissions' and 'Functionality permissions' sections below.

CLIENT AND CONTACT ACCESS PERMISSIONS

If you set the user as a 'Super Admin', the settings in this section will show as greyed out, as the user will automatically have access to all clients and contacts in your account.



Using the 'Access to clients' setting, you can specify whether the user should have full access to all clients in your account, or access to only certain clients or client groups. To grant the user access to all clients, select 'Full access'. Otherwise, click 'Only those selected' and specify the clients the user should have access to.

For each client group, choose either:

- **Access All:** The user will be able to access all clients in the client group, and will automatically have access to any new clients added to that group
- **Access None:** The user will not be able to access any clients in that client group
- **Custom:** Tick the boxes next to the specific clients that the user may access

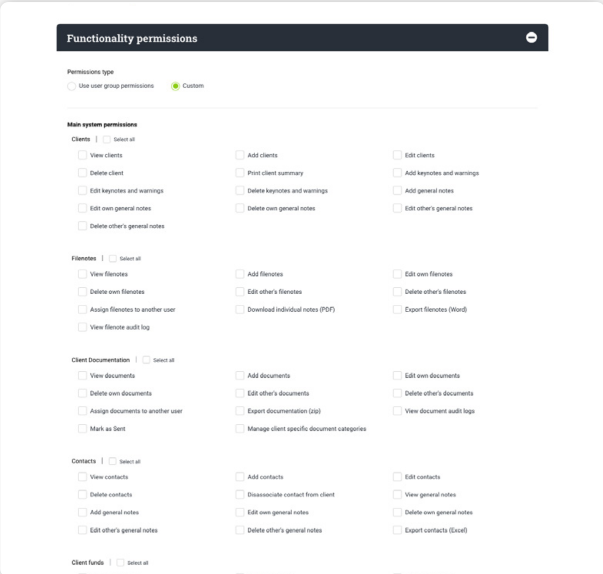
> In addition to being able to define exactly which clients each user is able to access, you can also restrict the specific sections of the client file that each user is able to access via the 'Functionality permissions' section. For example, you might restrict access to the 'Invoicing' section of each client's file to only those users in the finance team.

Using the 'Access to contacts' setting, you can specify whether the user should be able to access the details of all contacts stored in your account (including those related to clients the user may not be working with), or access to only contacts linked to the clients that the user is working with.

FUNCTIONALITY PERMISSIONS

From the 'Functionality permissions' section, you can choose exactly which parts of the system the user is able to access, and the actions they are able to perform.

If you set the user's 'Permission type' to 'Use user group default', the user's permission will automatically reflect the default permissions set for their assigned user group. If the default permissions set for the user group are updated, the changes will be automatically applied to the user.



Alternatively, if you want to set custom permissions specific to the user, set 'Permissions type' to 'Custom'. You'll then be able to choose the specific functionality permissions for the user via the tickbox list of main system and admin area permissions.

HR RECORDS

The system includes a dedicated HR database, allowing you to add and maintain HR Records for each of your employees.

When adding a user, you can choose to create a corresponding HR record for the employee, link the user to an existing HR record, or add the user without creating a corresponding HR record.

Created HR records will show in the HR Database section of the system, which you can access via Main **Menu > HR Database**. Full guidance on setting up and using the HR database can be found in our dedicated 'HR Database Guide', which available to download at qunote.com/support.

Editing and deleting users

You can edit or delete users from the **Admin > Users** page using the **Edit** and **Delete** buttons on the right-hand side.

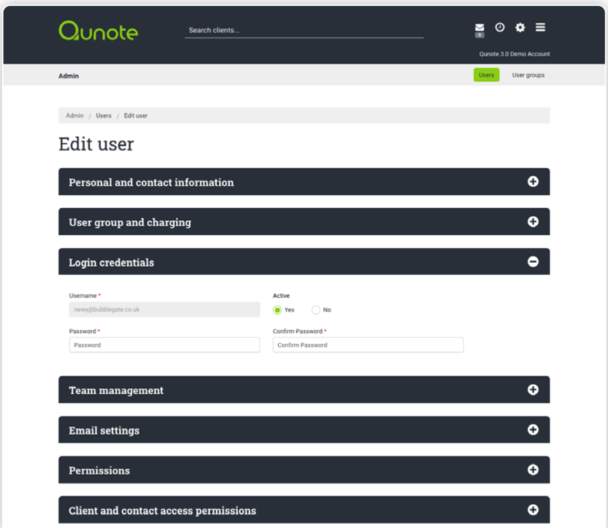
When you delete a user, all content added by the user will remain on your account, including clients, filenotes, documents, contacts and invoices. Additionally, the user's name will continue to show against content that they've added (e.g. where they are assigned as the author of a filenote or document).

SUSPEND A USER'S ACCESS

If you wish to suspend a user's access to your system, but don't want to delete their account entirely, you can make their account inactive.

To do this, go to **Admin > Users**, and click the **Edit** button beside the user's name. On the 'Edit user' page, expand the 'Login Credentials' section and set the 'Active' field to 'No'. When you save the user, their account will account will be deactivated, and they will no longer be able to login to the system.

If you want to reactivate a user's account, simply edit their details and set the 'Active' field to 'Yes'.



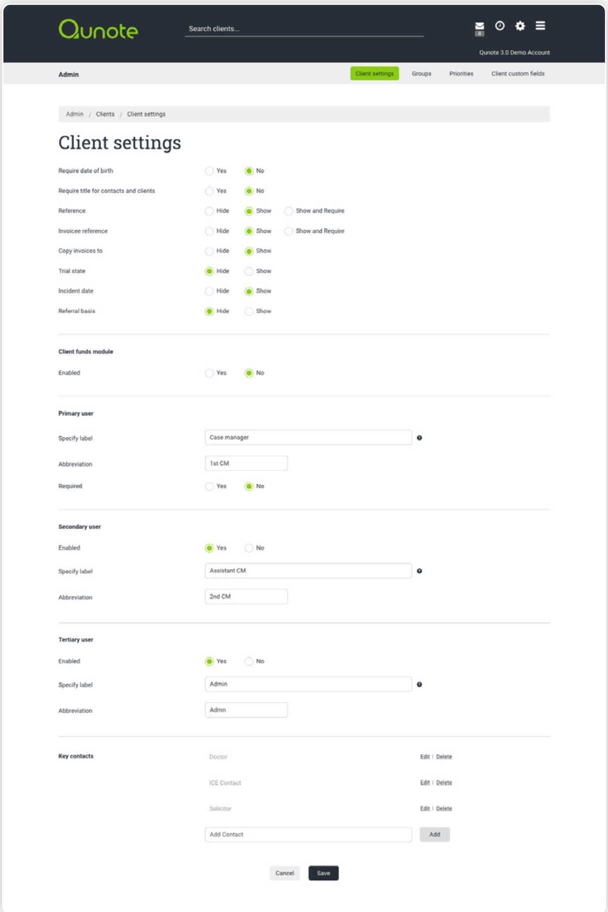
CLIENTS

From the ‘Clients’ section of admin area, you can edit your client settings, create and manage your different client groups and priority types, and set up your own custom fields for recording information against clients.

CLIENT SETTINGS

The settings included on the ‘Client settings’ page are as follows:

- **Require date of birth:** Determines whether users have to specify a date of birth when adding clients to the system
- **Require title for contacts and clients**: Determines whether users have to specify a title when adding clients and contacts to the system
- **Reference:** Allows you to show or hide the ‘Our Reference’ field when adding client details. Select ‘Show and require’ to make the field mandatory.
- **Invoicee reference:** Allows you to show or hide the ‘Invoicee Reference’ field when adding client details. Select ‘Show and require’ to make the field mandatory.
- **Trial state:** Allows you to show or hide the ‘Trial state’ field when adding client details. If shown, you will be able to specify whether a client’s case is pre- or post- trial when adding them to the system.
- **Referral basis:** Allows you to show or hide the ‘Referral basis’ field when adding clients. If shown, you will be able to specify whether a clients has been referred on a single or joint basis when adding them to the system.



Client funds module

Set the ‘Client funds module enabled’ field to ‘Yes’ to enable the ‘Client funds’ module of the system. If you hold funds on behalf of clients, this module will allow you to track the balance of funds held for each client from the system.

After enabling the client funds module from the ‘Client settings’ page, you will have the option to enable or disable ‘Client funds’ tracking for each individual client by via an option on the ‘Edit client’ page.

Primary, Secondary and Tertiary user

When adding a client to the system, you can assign up to three users to that client. The names of the users assigned to the client will show on the client's Summary page, and the client will show under the 'My clients' section of the assigned users' homepage dashboards.

> **Note:** Though it is only possible to assign up to three users to each client, this does not mean access to the client's file is limited to these three users only. You can allocate access to each client's file to as many different users as you wish. You can manage user access to client files from the 'Users' section of the admin area, as explained on **page 10** of this document.

From the 'Client settings' page, you can customise the label and abbreviation used for the primary, secondary and tertiary user assigned to each client based on your service/profession. For example, your labels might be 'Case Manager', 'Assistant Case Manager' & 'Admin' or 'Lead OT' 'Assistant OT' & 'Admin'.

You can also choose whether assigning a 'Primary user' to each client should be mandatory, and disable the 'Secondary user' and 'Tertiary user' fields altogether if you don't want to assign multiple users to each client.

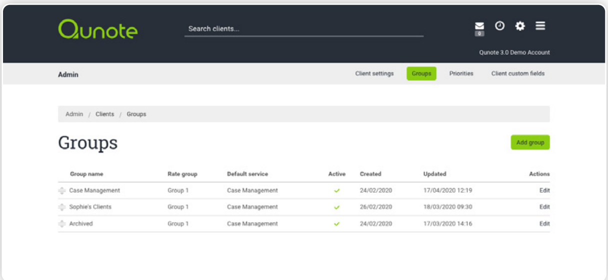
Key contacts

Each client has a 'Contacts' page where you can create an 'address book' of contacts for the client. If you would like the name of important contacts (such as who is the 'solicitor', or 'Next of Kin' contact) to be displayed on the Summary page for each client, you can set up the titles' of these key contacts here (e.g. Solicitor, Next of Kin, ICE Contact etc).

Once you've added the titles of the Key Contact types from the Client Settings page, you can assign the Key Contacts for each client via the 'Edit client' page which pulls through names of contacts from the client's contacts page. Once assigned, a client's Key Contacts will be listed on their Summary page.

CLIENT GROUPS

From the Client Groups section, you can create different client groups into which to organise your clients.

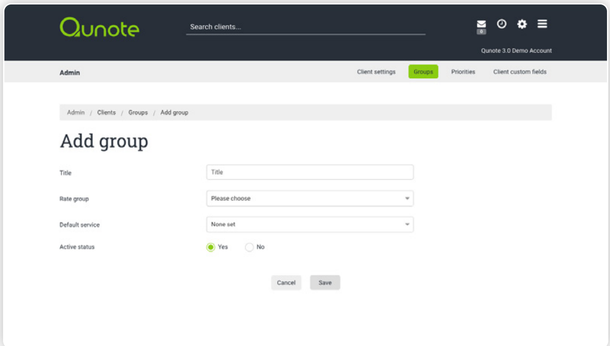


The number of client groups that you set up and the way in which you structure these is completely up to you. For example, you might choose to set up client groups aligned with the different stages of the case process (e.g. 'Referral', 'Live' and 'Closed'), and move clients between these groups as their case progresses. Alternatively, you might prefer to set up groups aligned with the different services you provide (e.g. 'Case Management' 'Occupational Therapy' & 'Medico Legal'), or geographical areas that you cover.

When adding a client to the system, you'll assign them to one of your created client groups. You can change the client group to which a client is assigned at any time.

Adding a client group

To add a new client group, go to **Admin > Clients > Groups**, and click the green **Add group** button in the top right of the page.



When adding a client group, you'll need to specify a title, and choose a rate group and default service. The rate group that you choose will determine the set of charges that you are able to assign to filenotes for clients within the group. If you set a default service, this will automatically pre-populate as the selected service when adding filenotes to clients within the group - though you will be able to manually change the service if required.

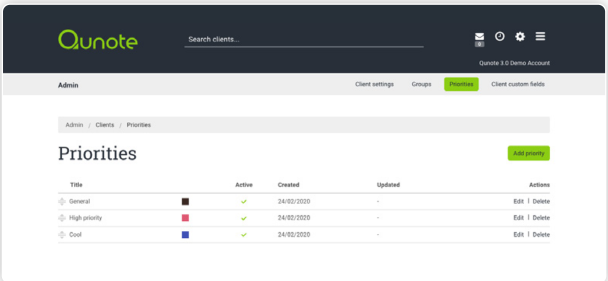
Editing and deleting client groups

You can edit or delete client groups from the **Admin > Clients > Groups** page using the **Edit** and **Delete** buttons on the right-hand side. It's only possible to delete client groups that do not currently have clients assigned to them.

You can also change the order in which client groups show in drop-down fields throughout the system by selecting the icons to the left-hand side of each group and dragging them into your desired order.

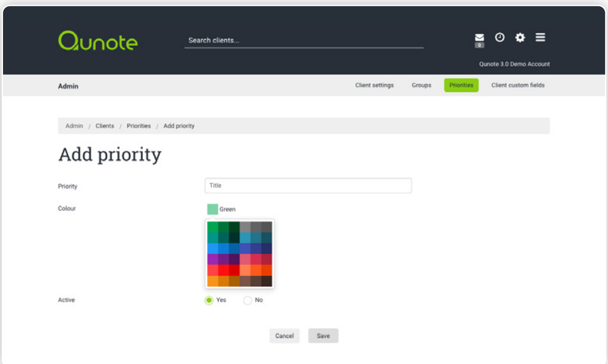
PRIORITIES

From the Priorities section, you can create different colour-coded priority status to assign to clients. You can assign a priority to a client when adding them to the system, and can change the priority type assigned to each client at any time.



Adding a priority

To add a priority, go to **Admin > Clients > Priorities** and click on the **Add priority** button in the top right of the page. When adding a priority, you'll need to specify a title and choose a colour to use for its tag.



Editing and deleting priorities

You can edit or delete priority types from the **Admin > Clients > Priorities** page using the **Edit** and **Delete** buttons on the right-hand side.

You can also change the order in which priorities show in drop-down fields throughout the system by clicking the icons to the left-hand side of each group and dragging them into your desired order.

CLIENT CUSTOM FIELDS

From the 'Client Custom Fields' section, you can add your own custom fields for users to complete when adding clients to the system.

You can add custom fields for any information that you want to be recorded for all clients on your system. For example, you might create fields for recording each client's NHS number, or the date that signed terms and conditions were received.

Custom fields that you create will be included in the 'Additional Information' section when adding or editing a client, with the information recorded for each client shown on their 'Summary' page.

Adding custom fields

To add a custom field, go to go to **Admin > Clients > Client Custom fields** and click on the **Add field** button in the top right of the page.

When adding client custom fields, you can specify:

- **Field title/label**
- **Field type:** Select the type of field you want to create. You can choose between Short text field, Normal text field, Yes/No field, Date, Date with reminder, and Drop down list. If you choose 'Drop down list' field, you'll then enter the different options that should appear in the drop down.
- **Client groups:** You can choose to apply the field to all of your different client groups, or to specific client groups only.
- **Required:** Choose whether responding to the field should be mandatory when adding clients to the system.

Date with reminder fields

Date with reminder fields allow you to record key dates on each client file, and set-up a reminder to flag at the top of the client's file when the key date is approaching. For example, you might set up a 'Date with reminder' field to track when each client's terms and conditions are due to renew. Using the field, you could record that a client's terms are due to renew on 20.09.2020, and set a reminder to show from 10.09.2019. When the reminder date is reached, a notification will show at the top of the client's file flagging terms and conditions renewal date is approaching, with an indication of the number of days left until this date is reached.

Editing and deleting client fields

You can edit or delete client fields from the **Admin > Clients > Client custom fields** page using the **Edit** and **Delete** buttons on the right-hand side. If you delete a custom field, any information recorded within the field on each client file will also be deleted.

You can also change the order in which client fields show within the client details form and on the client Summary page by clicking the icons to the left-hand side of each field and dragging them into your desired order.

FILENOTES

From the ‘Filenotes’ section of the admin area, you can edit your settings in relation to the ‘Filenotes’ of each client, which is where you record your clinical notes and time entailed. From this section, you can also create different categories to which to assign your filenotes, based on the subject of the note, or the type of contact or person to which it relates.

FILENOTE SETTINGS

The settings included on the ‘Filenotes settings’ page are as follows:

Capitalise title

If enabled, the titles of all filenotes added to the system will be automatically capitalised. For example, if you enter the title of a filenote as ‘Phone call with solicitor’, this would be automatically capitalised to display as ‘PHONE CALL WITH SOLICITOR’.

Allow zero duration

If enabled, users will be able to add filenotes to the system without specifying a duration of time spent, or specifying the duration as zero. If disabled, users will not be able to add filenotes without specifying a duration of time spent.

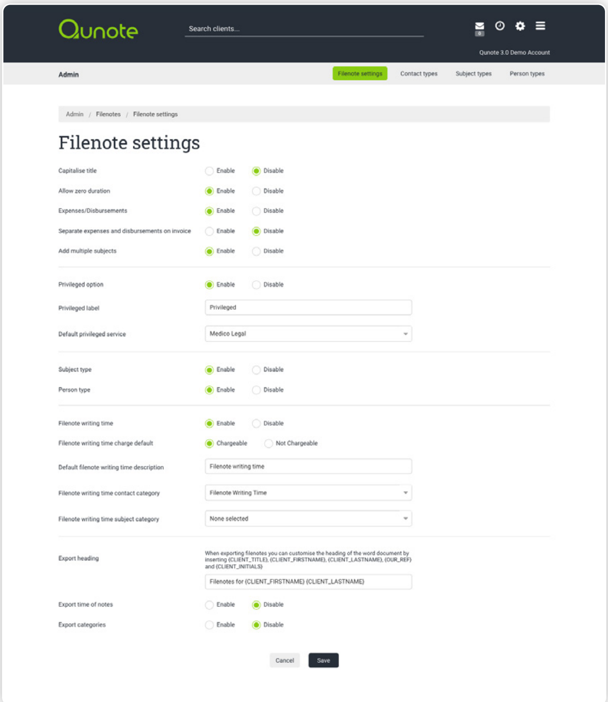
Expenses/disbursements

If enabled, users will be able to record incurred expenses or disbursements from client funds when adding filenotes to the system.

Add multiple subjects

If enabled, users will be able to add sets of details to each filenote by clicking an **Add subject** button in the filenote form. Each time the button is clicked, an additional ‘Details’ text field will be added, together with a drop down field for categorising the set of details according to subject.

Allowing multiple subjects in filenotes can be useful in circumstances where it would be difficult to assign a note to just one of your created subject categories. For example, you might have a phone call with third party where you discuss a range of different subjects. This phone call could be recorded in a single note with multiple subjects, thereby allowing each different subject of the conversation to be categorised accurately.



Privileged option

If enabled, users will be able to mark filenotes as privileged when adding them to a client's file. If you later export a client's filenotes from the system from the system for disclosure, you will have the option to exclude privileged filenotes from the export, or only export privileged notes.

Note: If you need to raise a separate invoice of privileged filenotes, you'll also need to create a new 'Service' type called 'Privileged' by going to **Admin > Invoicing > Services > Add Service** (see **page 45** for further details on adding services).

Once you've created this service, you should ensure that any privileged notes that you want to bill separately are assigned to it. When running invoices, you are able to choose which service to include on each, thereby allowing you to generate separate invoices for privileged and non-privileged activity.

Privileged label

Allows you to set the label that should be displayed for the field where users specify filenotes or documents as privileged. By default, the label will be set to 'Privileged'.

Default privileged service

Allows you to set a default service for privileged filenotes. If you set a default service, when a user marks a filenote a privileged, the 'Service' field in the filenote form will automatically update to the selected default. This is useful if you want all filenotes marked privileged to be assigned to the same service for billing purposes (e.g. you may have a 'Privileged' or 'Medico Legal' service), and can help mitigate against users accidentally assigning the incorrect service to notes.

If you don't want to set a default service for privileged filenotes, simply leave the field set to 'None set'.

Subject type

Allows you to enable or disable the 'Subject type' drop down field in the filenote form, which provides a way of categorising filenotes according to subject.

Person type

Allows you to enable or disable the 'Person type' drop down field in the filenote form, which provides a way of categorising filenotes to the person to which it relates.

Filenote writing time

Allows you to enable or disable the filenote writing time section of the filenote form. If you charge for time spent writing up clinical notes, your users will be able to record this time within this section of the form.

Filenote writing time charge default

Allows you to choose whether filenote writing time will be marked by default as chargeable or non-chargeable within the filenote form. Whatever you decide upon as the default selected option, users will still be able to change the chargeable status manually when adding filenote writing time.

Filenote writing time description

When recording filenote writing time duration on a filenote, users have the option to add an accompanying note via a 'Description' field. This setting allows you to set a default filenote writing time description that will automatically pre-populate into the 'Description' field when adding filenotes.

Filenote writing time contact category

Allows you to choose under which of your different contact types recorded filenote writing time should be categorised. If you present your invoices based on contact category, the category that you select from this drop down will determine the title for invoice lines relating to filenote writing time. For example, if you selected a contact type within the group 'Admin', filenote writing time would be presented as 'Admin' on your generated invoices.

The category that you select will also determine how filenote writing time is categorised when running certain reports.

Filenote writing time subject category

Allows you to choose under which of your different subject types recorded filenote writing time should be categorised. If you present your invoices based on subject category, the category that you select from this drop down will determine the title for invoice lines relating to filenote writing time. For example, if you selected a subject type within the group 'Clinical Documentation', filenote writing time would be presented as 'Clinical Documentation' on your generated invoices.

The category that you select will also determine how filenote writing time is categorised when running certain reports.

Export heading

Allows you to customise the heading of the Word document that is created when you export filenotes from the system. To auto-insert information about the specific client into the heading, such as the client's name, initials and reference number, use the merge tags listed above the field.

Export time of notes

If set to enabled, details of the date and time recorded for each note will be included when exporting filenotes from the system. If set to disabled, only details of the date will be included.

Export categories

If set to enabled, details of the contact, subject and person categories assigned to each filenote will be included when exporting filenotes from the system. If set to disabled, details of these categories will not be included.

FILENOTE CATEGORIES: CONTACT, SUBJECT AND PERSON CATEGORIES

When adding filenotes to the system, users can categorise each note according to the type of activity (the 'contact type', such as 'Visit' or 'Phone call'), the topic of the activity (the subject type, such as 'Clinical Care' or 'Clinical Documentation') and the person to which the activity relates (the person type, such as 'Client' or 'Case Manager'). The categories assigned to notes are used billing and reporting purposes, as can also be useful filtering and exporting filenotes.

If you set up your invoices to be organised by 'Contact type', time recorded on filenotes will be grouped and presented on generated invoices in accordance with the contact categories assigned to them. For example, you might have invoice lines for time spent on 'Phone calls', 'Emails' and 'Letters'.

Alternatively, if you set up your invoices to be organised by 'Subject type', time recorded on filenotes will be grouped and presented on generated invoices in accordance with the different subject categories assigned to them. For example, you might have invoice lines for time spent on 'Clinical Care, 'Clinical Documentation' and 'Domestic'.

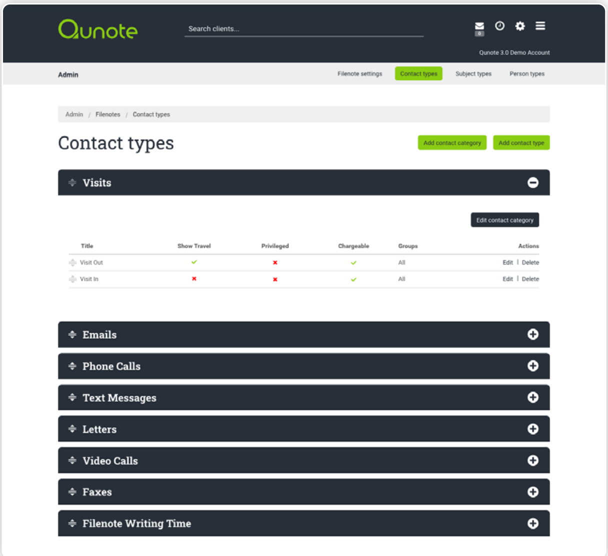
Adding and managing contact, subject and person categories

From the **Admin > Filenotes** section of the system, you can add and manage your different contact, subject and person category groups, and the individual types within each category. For example, you might have contact category group 'Phone calls', with individual types within this group such as 'Phone in', 'Phone Out: Contact' and 'Phone Out: Message left'.

When adding filenotes to the system, users assign them to an individual type, but it is the name of the category groups into which the assigned types fall that determines the grouping of items on invoices. For example, if you decide to run your invoices grouped by contact category, filenotes assigned to the individual types 'Phone in', 'Phone Out: Contact' and 'Phone Out: Message left would all be grouped onto the same invoice line under the name of the category group 'Phone calls'. Consequently, when adding and organising your different contact and subject categories and types, you should ensure the names of your category groups are aligned with the line titles that you want to use on your invoices.

CONTACT CATEGORIES

To view, add and manage your different contact categories and types, go to **Admin > Filenotes > Contact types**.



When you first go to the page, your different contact category groups are listed on the page. To view the individual contact types within a group, simply click on its name to expand the list.

Adding contact category groups and types

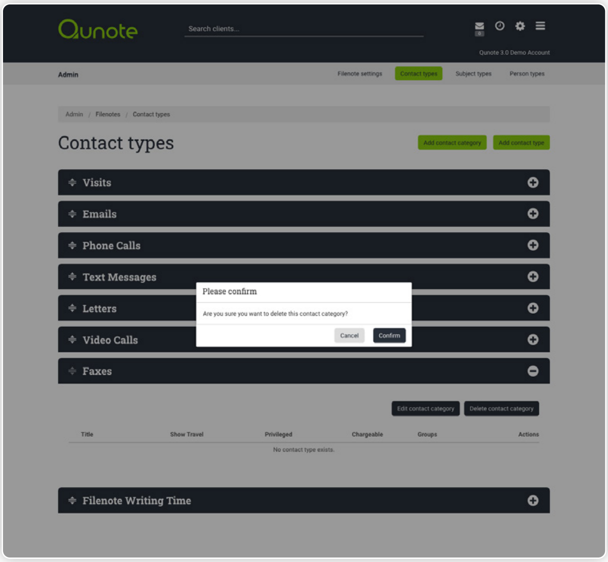
To add a contact category group, click the **Add contact category** button in the top right-hand corner. When adding a contact category group, you'll need to specify a title (e.g. 'Phone calls')

To add an individual contact type to one of your category groups, click the **Add contact type** button in the top right-hand corner. When adding a type, you'll need to specify the following:

- **Category:** Select the contact category group under which the individual type should sit (e.g. 'Phone calls').
- **Name:** Specify the title of the contact type (e.g. 'Phone Out: Message left').
- **Chargeable:** If set to 'Yes', when the user selects the contact type within the filenote form, the chargeable status of the filenote will automatically update to 'Chargeable'. If set to 'No', when the user selects the contact type within the filenote form, the chargeable status of the filenote will automatically update to 'Not chargeable'.
- **Show Travel:** If set to 'Yes', when the user selects the contact type within the filenote form, the 'Travel' section of the filenote form will display, allowing the user to specify travel time, mileage and destination. If you want to record and charge out for travel time, you should ensure 'Show travel' is set to 'Yes' for any contact types likely to involve travel, such as 'Visit out' or 'Meeting'.
- **Email category:** If set to 'Yes', any filenotes assigned to the contact type will be marked with an icon on the filenote list page, indicating that they relate to emails.
- **Allow multiple actions:** If set to 'Yes', when the user selects the contact type within the filenote form, an extra number field will appear allowing the user to specify the number of different actions covered by the filenote. For example, users could specify that a filenote covers '5 x Emails' or '3 x Phone calls'.
- **Default charge:** Allows you to set a default charge rate for the contact type. If you If you set a default charge, when the user selects the contact type within the filenote form, the 'Charge' field for the filenote will automatically update to default charge rate set. For example, if creating a contact type for 'Admin', you might wish to set this up so that your admin charge is automatically assigned each time the contact type is selected.
- **Allow all groups:** If set to 'Yes', all users will be able to assign filenotes to the contact type. If set to 'No', only users within the user groups you select will be able to assign filenotes to the contact type.

Editing and deleting contact category groups and types

You can edit or delete contact types from the **Admin > Filenotes > Contact types** page using the **Edit** and **Delete** buttons on the right-hand side.

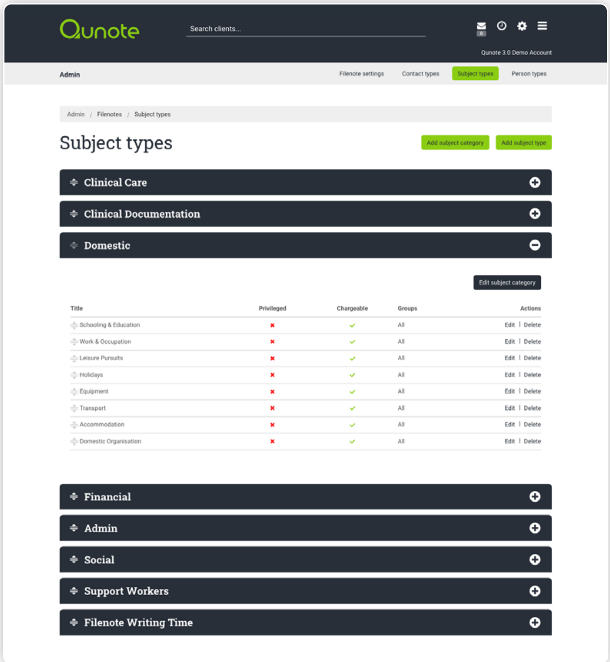


If you wish to delete a contact category group, you must first delete all of the types within the group. Once this is done, a **Delete contact category** button will display on the right-hand side, allowing you to delete the category group.

You can also change the order in which contact category groups and types show in the drop-down field within the filenote form by clicking the icons to the left-hand side of each category or type and dragging them into your desired order.

SUBJECT CATEGORIES

To view, add and manage your different subject categories and types, go to **Admin > Filenotes > Subject types**.



When you first go to the page, your different subject category groups are listed on the page. To view the individual subject types within a group, simply click on its name to expand the list.

Adding subject category groups and types

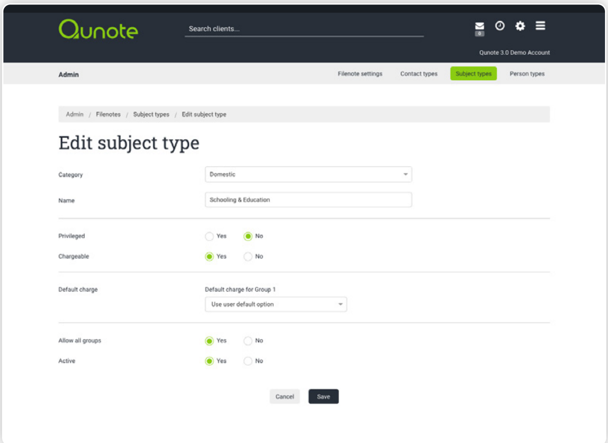
To add a subject category group, click the **Add subject category** button in the top right-hand corner. When adding a subject category group, you'll need to specify a title (e.g. 'Clinical care').

To add an individual subject type to one of your category groups, click the **Add subject type** button in the top right-hand corner. When adding a type, you'll need to specify the following:

- **Category:** Select the subject category group under which the individual type should sit (e.g. 'Clinical care').
- **Name:** Specify the title of the subject type (e.g. 'Clinical reasoning').
- **Chargeable:** If set to 'Yes', when the user selects the subject type within the filenote form, the chargeable status of the filenote will automatically update to 'Chargeable'. If set to 'No', when the user selects the subject type within the filenote form, the chargeable status of the filenote will automatically update to 'Not chargeable'.
- **Default charge:** Allows you to set a default charge rate for the subject type. If you If you set a default charge, when the user selects the subject type within the filenote form, the 'Charge' field for the filenote will automatically update to default charge rate set. For example, if creating a subject type for 'Admin', you might wish to set this up so that your admin charge is automatically assigned each time the subject type is selected.
- **Allow all groups:** If set to 'Yes', all users will be able to assign filenotes to the subject type. If set to 'No', only users within the user groups you select will be able to assign filenotes to the subject type.

Editing and deleting subject category groups and types

You can edit or delete subject types from the **Admin > Filenotes > Subject types** page using the **Edit** and **Delete** buttons on the right-hand side.



If you wish to delete a subject category group, you must first delete all of the types within the group. Once this is done, a **Delete subject category** button will display on the right-hand side, allowing you to delete the category group.

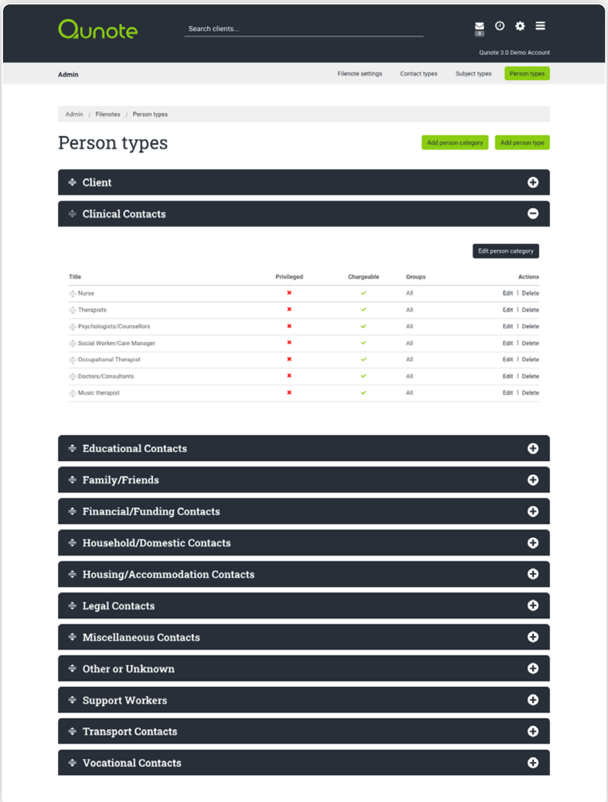
You can also change the order in which subject category groups and types show in the drop-down field within the filenote form by clicking the icons to the left-hand side of each category or type and dragging them into your desired order.

Disabling the 'Subject type' drop down field

If you want to disable the 'Subject type' drop down field entirely, so that users do not need to assign a subject type when adding filenotes, you can do this by going to the **Admin > Filenote Settings** page, and setting the 'Subject type' field to 'Disable'.

PERSON CATEGORIES

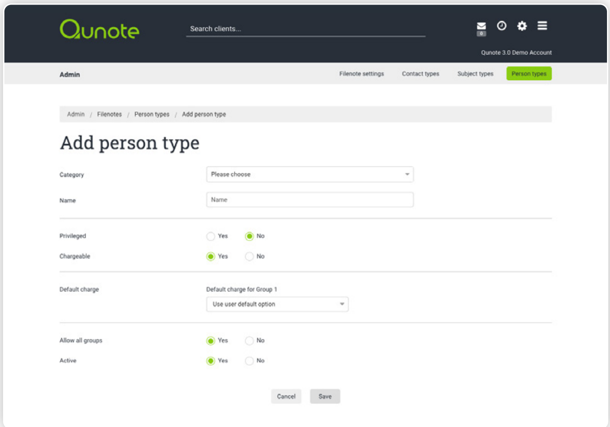
To view, add and manage your different person categories and types, go to **Admin > Filenotes > Person types**.



When you first go to the page, your different person category groups are listed on the page. To view the individual person types within a group, simply click on its name to expand the list.

Adding person category groups and types

To add a person category group, click the **Add person category** button in the top right-hand corner. When adding a person category group, you'll need to specify a title (e.g. 'Clinical Contacts').



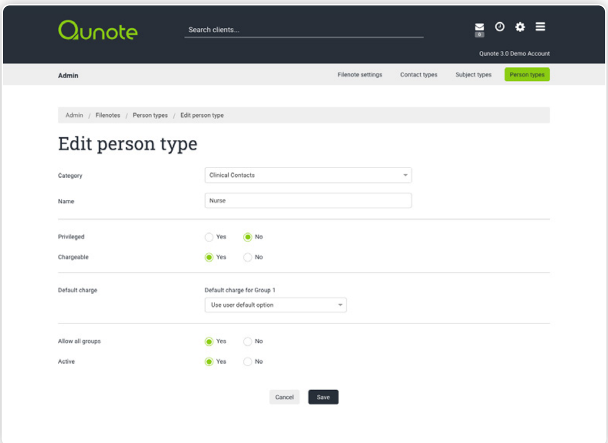
To add an individual person type to one of your category groups, click the **Add person type** button in the top right-hand corner. When adding a type, you'll need to specify the following:

- **Category:** Select the person category group under which the individual type should sit (e.g. 'Clinical Contacts').
- **Name:** Specify the title of the person type (e.g. 'Psychologist').
- **Chargeable:** If set to 'Yes', when the user selects the person type within the filenote form, the chargeable status of the filenote will automatically update to 'Chargeable'. If set to 'No', when the user selects the person type within the filenote form, the chargeable status of the filenote will automatically update to 'Not chargeable'.

- **Default charge:** Allows you to set a default charge rate for the person type. If you If you set a default charge, when the user selects the person type within the filenote form, the 'Charge' field for the filenote will automatically update to default charge rate set. For example, if creating a person type for 'Admin', you might wish to set this up so that you admin charge is automatically assigned each time the person type is selected.
- **Allow all groups:** If set to 'Yes', all users will be able to assign filenotes to the person type. If set to 'No', only users within the user groups you select will be able to assign filenotes to the person type.

Editing and deleting person category groups and types

You can edit or delete person types from the **Admin > Filenotes > Person types** page using the **Edit** and **Delete** buttons on the right-hand side.



If you wish to delete a person category group, you must first delete all of the types within the group. Once this is done, a **Delete person category** button will display on the right-hand side, allowing you to delete the category group.

You can also change the order in which person category groups and types show in the drop-down field within the filenote form by clicking the icons to the left-hand side of each category or type and dragging them into your desired order.

Disabling the 'Person type' drop down field

If you want to disable the 'Person type' drop down field entirely, so that users do not need to assign a person type when adding filenotes, you can do this by going to the **Admin > Filenote Settings** page, and setting the 'Person type' field to 'Disable'.

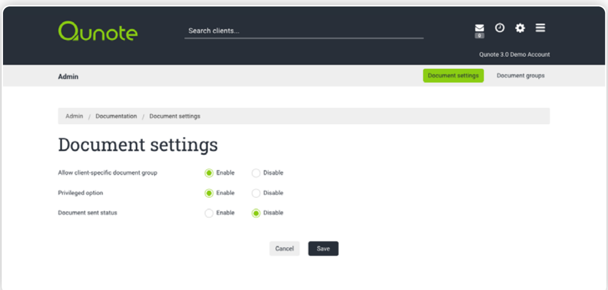
DOCUMENTATION

From the 'Documentation' section of admin area, you can edit your settings in relation to the 'Documents' section of each client file, which is where you can upload documentation and other files relating to the client's case. From this section, you can also create different categories for organising documents.

DOCUMENT SETTINGS

The settings included on the 'Document settings' page are as follows:

- **Allow client-specific document groups:** If enabled, this allows you to create document categories that are specific to particular clients, and only appear on these client's files.
- **Privileged option:** If enabled, this allows you to mark documents as privileged when uploading to a client file. If you later export documentation from the system for disclosure, you will have the option to exclude privileged documents from the export.
- **Document sent status option:** If enabled, you will have the option to mark whether documents have been sent.



DOCUMENT GROUPS

From the Document Groups section, you can create different document groups to categorise documents that you upload to client files, much like folders. The number of different documents groups and the way in which you structure these is completely up to you.

Adding a document group

To add a new document group, go to **Admin > Documents > Document groups**, and click the green **Add group** button in the top right of the page.

When adding a document group, you'll need to specify a title, and choose which user groups should be able to access the document group. If you restrict access to 'Specific user groups', only users within the user groups that you select will be able to see documents assigned to the group, and assign documents to the group when uploading to the system.

Editing and deleting document groups

You can edit or delete document groups from the **Admin > Documents > Document groups** page using the **Edit** and **Delete** buttons on the right-hand side.

You can also change the order in which document groups show in drop-down fields throughout the system by clicking the icons to the left-hand side of each group and dragging them into your desired order.

CONTACTS

From the 'Contacts' section of admin area, you can edit the settings in relation to the 'Contacts' section of each client file, and create your own custom tickbox fields to include on contact records.

CONTACT SETTINGS

The settings included on the 'Contact settings' page are as follows:

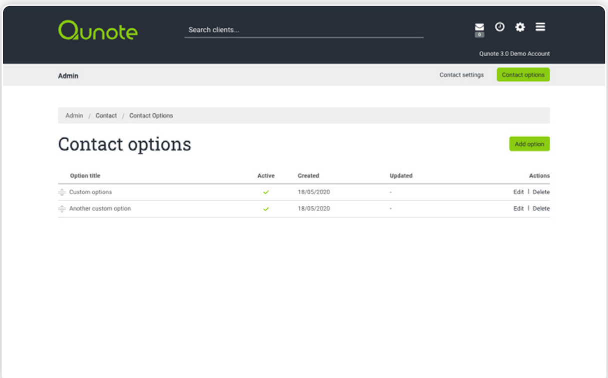
- **Require first name:** Determines whether users have to specify a first name when adding clients and contacts to the system.

CONTACT OPTIONS

From the 'Contact options' section, you can add your own custom tickbox fields for users to complete when adding contacts to the system.

You can add tickbox fields for any information that you want to be recorded for contacts. For example, you might create tickbox fields for specifying if a contact is the Next of Kin for a client, or if they should receive a Christmas card.

Custom 'Contact option' tickbox fields that you create will be included in the form when adding or editing a contact.



Adding a contact option

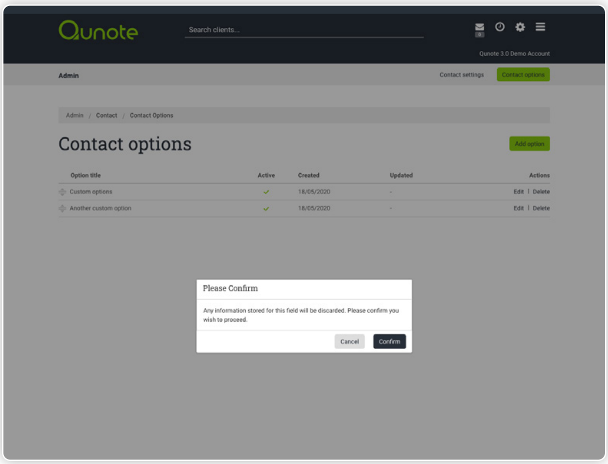
To add a new contact option, go to **Admin > Contacts > Contact options**, and click the green **Add contact option** button in the top right of the page.

When adding a contact option, you'll need to specify a title.

Editing and deleting contact options

You can edit or delete contact options from the **Admin > Contacts > Contact options** page using the **Edit** and **Delete** buttons on the right-hand side.

You can also change the order in which Contact option fields show within the contact details form and on the 'View contact' page by clicking the icons to the left-hand side of each field and dragging them into your desired order.



EMAILS

Qunote's 'Email to filenote' facility allows users to send client-related emails directly into the system, and then quickly save these to the relevant client files.

You can set up a Qunote email address for each of your users. Thereafter, when a user receives an email that they want to save to a client's file in Qunote, they can simply forward it on to their Qunote email address. If they are sending an email that they want to save to a client's file within Qunote, they can simply copy or blind copy their Qunote email address. Any emails that they send into Qunote will arrive in their Qunote inbox, and can then be saved as filenotes to the relevant client files.

SETTING UP QUNOTE EMAIL ADDRESSES FOR USERS

All Qunote email addresses use the format

[USER_ALIAS].[COMPANY_ALIAS]@qunote3.net

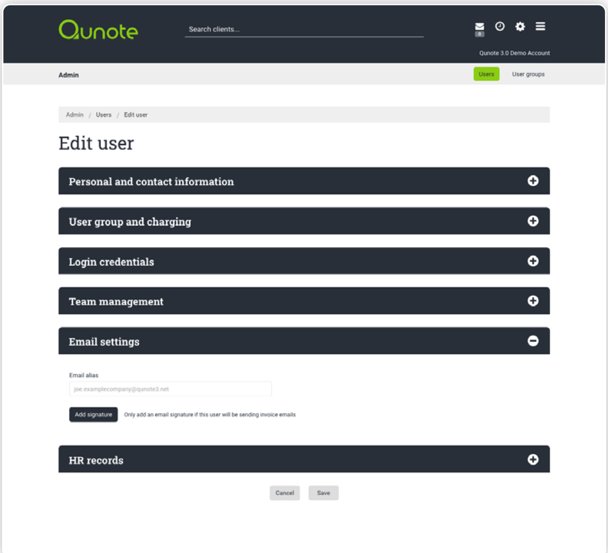
For example **joe.examplecompany@qunote3.net**

Before you can set up individual Qunote email addresses for each of your users, you first need to set the **[COMPANY_ALIAS]** part of the address. To do this, go to **Admin > Emails > Email settings**, and enter your preferred company email alias in the 'Company email alias' field, without any spaces (e.g. 'examplecompany'). It's usually most straightforward to use your company name as your company alias, so enter this into the 'Company email alias' field, and click the **Save** button directly beneath. Once set, the **[COMPANY_ALIAS]@qunote3.net** part of your Qunote email addresses will be displayed in place of the field.

Once you've set your company email alias, you can set up individual Qunote email addresses for each of your users. To do this, you need to set the **[USER_ALIAS]** part of the email address for each user. Go to **Admin > Users**, and click **Edit** to the right-hand side of a user's name.

On the 'Edit user' page, expand the 'Email settings' section, and enter an individual alias for the user in the 'Email alias' field, without any spaces. How you format these aliases is up to you: may choose to use each individual's full name as their alias (e.g. 'joebloggs'), their first name only (e.g. 'joe'), or perhaps their last name and first initial (e.g. 'bloggsj'). Once you've entered an email alias, click **Save** at the bottom of the page.

Once set, the 'Email settings' section of the user's profile will display their full Qunote email address (e.g. joe.examplecompany@qunote3.net) and the user can start sending emails into their Qunote account using this address.



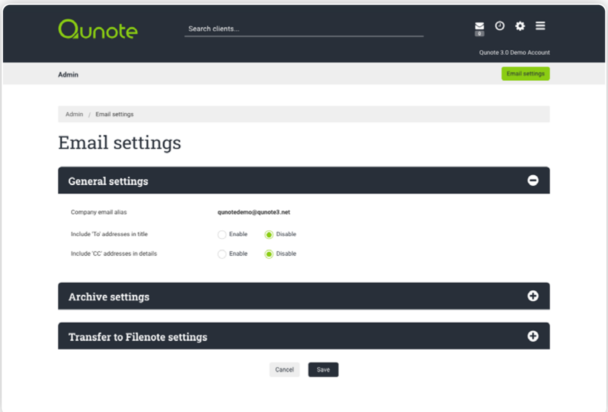
EMAIL SETTINGS

From the ‘Emails’ section of the admin area, you can edit your different settings in relation to the system’s email functions, including the ‘Transfer to filenote’ form, which is used to save emails as filenotes on client records.

The settings included on the ‘Email settings’ page are as follows:

General settings

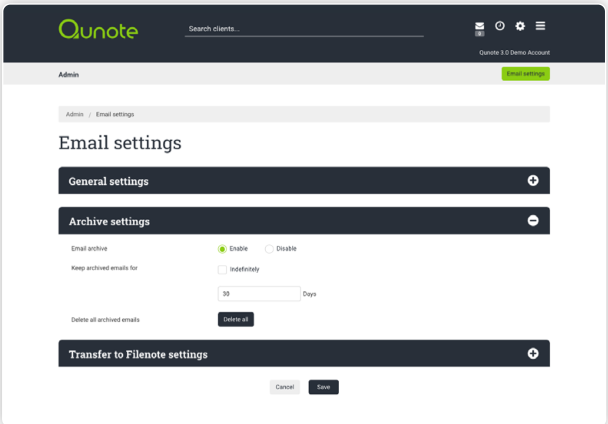
Company email alias – Use this field to set your company email alias, as outlined in the section above.



- **Include ‘To’ addresses in title:** If enabled, when saving an email as a filenote using the ‘Transfer to filenote’ form, the email addresses of all ‘To’ recipients of the email will be automatically included in the ‘Title’ field.
- **Include ‘CC’ addresses in details:** If enabled, when saving an email as a filenote using the ‘Transfer to filenote’ form, the email addresses of all ‘CC’ recipients of the email will be automatically included in the ‘Details’ field.

Archive settings

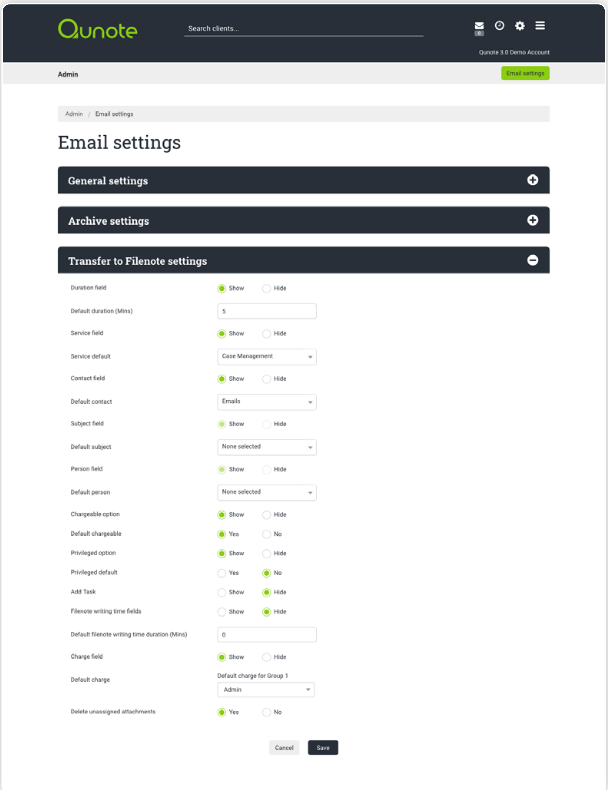
Once emails are transferred to client files using the ‘Email to filenote’ facility, they no longer display within each user’s Qunote inbox, in order to prevent emails being accidentally transferred multiple times. You can, however, enable an ‘Email archive’ page, which will allow users to view previously transferred emails, and restore these emails to their Qunote inbox in the event that they need to transfer them again.



- **Email archive:** If set to ‘Enabled’, users will be able to access the ‘Email archive’, and emails will remain accessible from this page after they have been transferred. If set to disabled, the ‘Email archive’ will not be accessible, and emails will not remain archived once transferred. If you set ‘Email archive’ to disabled, all currently archived emails will be automatically deleted.
- **Keep archived emails for:** Allows you to choose how many days archived emails should be retained. Once an email has been retained for the number of days specified, it will be automatically deleted from the email archive. To keep all emails archived indefinitely, simply tick the ‘Indefinitely’ box.
- **Delete all archived emails:** To delete all of your currently archived emails, click the **Delete all** button.

Transfer to Filenote settings

Once an email has been sent into the system, it can then be saved as a filenote on the relevant client's file using the 'Transfer to filenote' form. The settings in this section allow you to customise the 'Transfer to filenote' form by setting default values for fields, or hiding fields entirely from the form.



- **Duration field:** Allows you to show or hide the 'Duration' field. You'll only be able hide the field if you've set a 'Default duration' greater than 0.
- **Default duration (Mins):** Allows you to set a default duration (in minutes) that will pre-populate in the 'Duration' field of the 'Transfer to filenote' form each time that the form is opened. If you've set the 'Duration' field to show within the form, users will be able to overwrite the pre-populated duration when saving emails. If you've set the 'Duration' field to be hidden from the form, users will not be able to overwrite the duration, and so the 'Default duration' set will be automatically assigned to all filenotes created from emails.
- **Service field:** Allows you to show or hide the 'Service' drop down field. You'll only be able hide the field if you've set a 'Service default'.
- **Service default:** Allows you to choose a default service type that will pre-populate in the 'Service' field of the 'Transfer to filenote' form each time that the form is opened. If you've set the 'Service' field to show within the form, users will be able to change the service when saving emails. If you've set the 'Service' field to be hidden from the form, users will not be able to change the service, and so the 'Service default' set will be automatically assigned to all filenotes created from emails.
- **Contact field:** Allows you to show or hide the 'Contact' drop down field. You'll only be able hide the field if you've set a 'Default contact'.
- **Default contact:** Allows you to choose a default contact type that will pre-populate in the 'Contact' field of the 'Transfer to filenote' form each time that the form is opened. If you've set the 'Contact' field to show within the form, users will be able to change the contact type when saving emails. If you've set the 'Contact' field to be hidden from the form, users will not be able to change the assigned contact type, and so the 'Default contact' set will be automatically assigned to all filenotes created from emails.

- **Subject field:** Allows you to show or hide the 'Subject' drop down field. You'll only be able hide the field if you've set a 'Default subject'.
- **Default subject:** Allows you to choose a default subject type that will pre-populate in the 'Subject' field of the 'Transfer to filenote' form each time that the form is opened. If you've set the 'Subject' field to show within the form, users will be able to change the subject type when saving emails. If you've set the 'Subject' field to be hidden from the form, users will not be able to change the assigned subject type, and so the 'Default subject' set will be automatically assigned to all filenotes created from emails.
- **Person field:** Allows you to show or hide the 'Person' drop down field. You'll only be able hide the field if you've set a 'Default person'.
- **Default person:** Allows you to choose a default person type that will pre-populate in the 'Person' field of the 'Transfer to filenote' form each time that the form is opened. If you've set the 'Person' field to show within the form, users will be able to change the person type when saving emails. If you've set the 'Person' field to be hidden from the form, users will not be able to change the person type, and so the 'Default person' set will be automatically assigned to all filenotes created from emails.
- **Chargeable option:** Allows you to show or hide the 'Chargeable' field, where users can choose whether each email is chargeable or non chargeable.
- **Default chargeable:** Allows you to choose whether the default chargeable status for emails is chargeable or non-chargeable. If you've set the 'Chargeable option' field to show within the form, users will be able to change the chargeable status when saving emails. If you've set the 'Chargeable option' field to be hidden from the form, users will not be able to change the chargeable status and so the 'Default chargeable' status set will be automatically assigned to all filenotes created from emails.
- **Add Task:** Allows you to show or hide the 'Add task' section of the form. If shown, users will be able to add follow up tasks when saving emails as filenotes.
- **Filenote writing time fields:** Allows you to show or hide the 'Filenote writing time' fields.
- **Default filenote writing time duration (Mins):** Allows you to set a default duration (in minutes) that will pre-populate in the 'Filenote writing time duration' field of the 'Transfer to filenote' form each time that the form is opened. If you've set the 'Filenote writing time fields' field to show within the form, users will be able to overwrite the pre-populated filenote writing time duration when saving emails. If you've set the 'Filenote writing time fields' field to be hidden from the form, users will not be able to overwrite the duration, and so the 'Default filenote writing time duration' set will be automatically assigned to all filenotes created from emails.
- **Charge field:** Allows you to show or hide the 'Charge rate' drop down field. You'll only be able hide the field if you've set a 'Default charge'.

- **Default charge:** Allows you to choose a default charge that will pre-populate in the 'Charge rate' field of the 'Transfer to filenote' form each time that the form is opened. If you've set the 'Charge rate' field to show within the form, users will be able to change the charge rate when saving emails. If you've set the 'Charge rate' field to be hidden from the form, users will not be able to change the charge, and so the 'Default charge' set will be automatically assigned to all filenotes created from emails.
- **Delete unassigned attachments:** When saving emails as filenotes using the 'Transfer to filenote' form, you can also transfer relevant attachments to the 'Documents' section of a client's file. As part of the process, you select the document category (e.g. reports, letters etc.) that should be assigned to each attachment when it is transferred.

Note: The 'Delete unassigned attachments' setting allows you to simplify the process of transferring attachments by automatically deleting any irrelevant attachments that you do not want to transfer. If set to 'No', when saving an email as a filenote using the 'Transfer to filenote' form, any irrelevant attachments that you do not wish to transfer will need to be manually deleted prior to transferring the email. If set to 'Yes', any attachments that you have not assigned to a document category will be automatically deleted when you transfer the email, and not transferred to the client file, thereby saving you from needing to manually delete each irrelevant attachment.

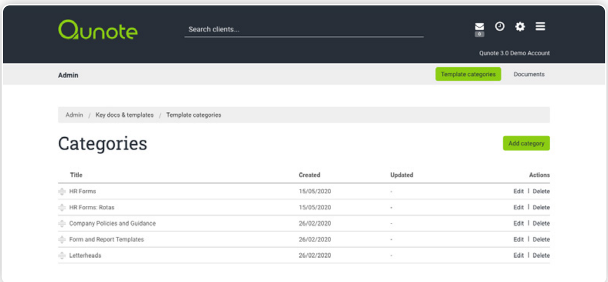
KEY DOCS & TEMPLATES

From the 'Key document & templates' section of admin area, you can upload all of your company templates and other key documentation (such as policies) so that these are accessible to your users, wherever they may be, from a dedicated 'Key docs & and templates' library within the system.

Your key documentation and templates can be organised into different categories. For example, you might have a category for 'Report templates', 'Policies', or 'Letterheads'. To view, add and manage your different categories, go to **Admin > Key docs & templates**.

Adding document categories

To add a 'Key docs & templates' category, go to **Admin > Key docs & templates > Template categories** and click on the **Add category** button in the top right of the page. When adding a category, you'll need to specify a title.



Editing and deleting document categories

You can edit or delete 'Key docs & template' categories from the **Admin > Key docs & templates > Template categories** page using the **Edit** and **Delete** buttons on the right-hand side. If you delete a category, this will also delete all of the files assigned to it.

You can also change the order in which categories show in the 'Key docs and templates' library by clicking the icons to the left-hand of each field and dragging them into your desired order.

Uploading documents

To upload your key documents and template files, go to **Admin > Key docs & templates > Documents**, and click the **Add document** button in the top right-hand corner. When uploading file, you'll need to specify the following:

- **Title:** Specify the title of the document
- **Description:** Allows you to enter a short description for the document. The description will be displayed alongside the document title within the 'Key docs & and templates' library.
- **Category:** Choose the category under which the document should sit
- **File:** Click the **Choose file** button and choose the file you want to upload

The system will allow you to upload most major file formats, including PDFs, Word documents, Excel documents and PowerPoints, as well as common video, photos and sound file formats.

Once your document or file has been added, it will be accessible to users via the 'Key docs and templates' library on the system, displayed under the section for its assigned category.

Editing and deleting documents

You can edit or delete key documents and templates from the **Admin > Key docs & templates > Documents** page using the **Edit** and **Delete** buttons on the right-hand side.

You can also change the order in which documents show in the 'Key docs and templates' library by clicking the icons to the left-hand side of each field and dragging them into your desired order.

INVOICING

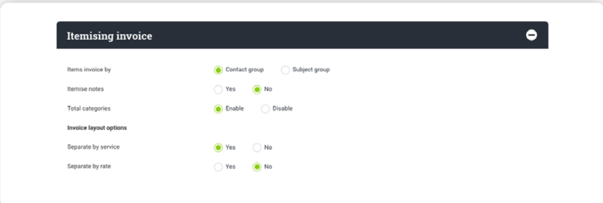
From the ‘Invoicing’ section of admin area, you can edit settings in relation to your charging and invoicing rates. You can set up charge rates for different clients or activities, add details of the different services that your provide, and customise the layout and formatting of your invoices.

INVOICING SETTINGS PAGE

The settings included on the ‘Invoicing settings’ page are as follows:

Itemising invoice

The settings in this section determine whether chargeable activity recorded on filenotes is presented as grouped according to category or fully itemised when generating invoices, and how invoice items assigned to different rates or services should be presented on invoices.



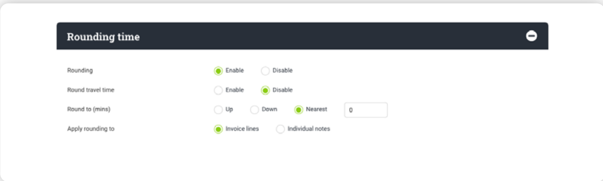
- **Itemise invoice by:** If set to ‘Contact group’, charges will be displayed on your invoices based on the contact categories assigned to the associated filenotes, e.g. Visits, Phone calls, Emails etc. If set to ‘Subject group’, charges will be displayed on your invoices based on the subject categories assigned to the associated filenotes, e.g. Clinical intervention, Clinical Documentation etc.
- **Itemise notes:** If set to ‘Yes’, individual filenotes will be itemised on generated invoices, with the charge related to each filenote presented as a separate invoice line. If set to ‘No’ charges will not be itemised. Instead, filenote charges will be grouped onto invoice lines based on contact/ subject category and rate.

  For example, the charges for all ‘Phone calls’ filenotes assigned to the same rate would be grouped onto a single invoice line labelled ‘Phone calls’, and the charges for all ‘Emails’ filenotes assigned to the same rate would be grouped onto a single invoice line labelled ‘Emails’.

  Regardless of whether you set your invoices to be fully itemised or not, visits out are always itemised at the top of invoices. This is in order to make it easier to identify the interventions to which any travel time and mileage charged on the invoice relates.
- **Total categories:** If enabled, when running an invoice grouped by contact or subject category, each invoice line will include an indication of the number of interventions that it represents. For example, the invoice line title might read ‘4 x Phone calls’ or ‘7 x Emails’. If disabled, this indication of the number of interventions will not be included.
- **Separate by service:** If set to ‘Yes’, when generating an invoice including charges related to multiple services, the charges related to each service will be displayed within separate section of the invoice. For example, the invoice might contain a section showing charges related to ‘Case Management’, and a section showing charges related to ‘Medico Legal’.
- **Separate by rate:** If set to ‘Yes’, when generating an invoice including charges assigned to different rates, the charges related to each rate will be displayed within separate sections of the invoice. For example, the invoice might contain section showing charges assigned to your ‘Case Management’ rate, a section showing charges assigned to your ‘OT’ rate, and a section showing charges assigned to your ‘Admin’ rate.

Rounding time

- **Rounding:** If enabled, intervention time charged on invoices will be rounded in accordance with your rounding settings specified. If disabled, intervention time charged on invoices will not be rounded, and will instead reflect the actual time recorded in filenotes.



If you enable rounding, the following additional settings will display, allowing you to specify how rounding should be applied:

- **Round travel time:** If enabled, travel time charged on invoices will be rounded in accordance with your rounding settings specified. If disabled, travel time charged on invoices will not be rounded, and will instead reflect the actual travel time recorded in filenotes.
- **Round to (mins):** Allows you to specify the unit (in minutes) that time should be rounded to, and the direction in which rounding should be applied: Up, down, or to the nearest unit.
- **Apply rounding to:** Allows you to specify whether rounding should apply to the total duration of each invoice line (i.e. the aggregated total of all notes represented by the invoice line), or to the total of each individual filenote/ intervention represented by the invoice line. The option that you choose will have a significant impact on the amount time that is charged on the invoice, as explained in the box below.

Applying rounding to 'Invoice Lines' or 'Individual notes'?

Deciding to apply rounding to totals of invoice lines or individual filenotes can produce quite different totals when generating invoices.

For example: Let's say you enable rounding and specify that totals should be rounded up to 5 minute units. You run an invoice for a client, with items grouped according to contact category. The invoice contains a line representing three 'Phone call' filenotes, with the individual duration of each of these notes being as follows:

Note 1: 7 minutes
Note 2: 8 minutes
Note 3: 16 minutes
Total: 31 minutes

If you set **'Apply rounding to' to 'Invoicing lines'**, the rounded total of the invoice line would be 35 minutes: 31 mins rounded up to 35 mins.

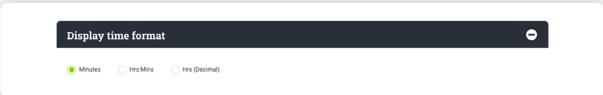
If you set **'Apply rounding to' to 'Individual notes'** the rounded total of the invoice line would be 40 minutes:

Note 1: 7 mins rounded to 10 mins +
Note 2: 8 mins rounded to 10 mins +
Note 3: 16 mins rounded to 20 mins =
Total: 40 mins

As you can see, the rounded total for the invoice line differs depending on whether rounding is applied to invoice lines or each individual filenote, so it's important to carefully consider how you want rounding to be applied when defining your rounding settings.

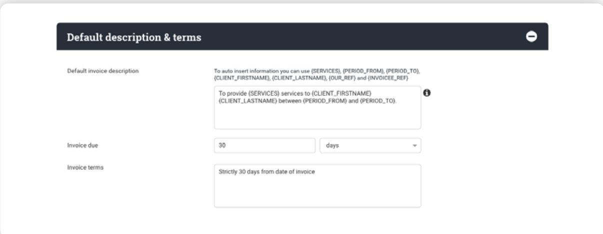
Display time format

Allows you to choose the format in which durations are shown on the invoice. You can display durations in minutes (e.g. '75 minutes'), hh:mm (e.g. 01:15), or decimal hrs (e.g. 1.25 hrs).



Default description & terms

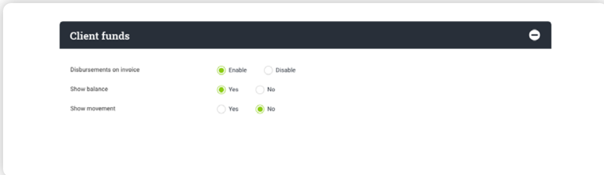
Default invoice description – Allows you to set-up a default invoice description that will be automatically pre-populated onto all draft invoices. To auto-insert specific information about the client or invoice into the description, such as the client's name, reference, invoicee reference and services, use the merge tags listed above the field. Users will be able to edit the pre-populated 'Invoice description' for each invoice prior to finalising the invoice.



- **Invoice due:** Allows you to specify the payment due period for invoices. The 'Invoice due' date for each invoice will be calculated based on the period specified. For example, if you set the 'Invoice due' period to 1 month, an invoice dated 31/03/2020 would have its due date set to 30/04/2020.
- **Invoice terms:** Allows you to specify your invoice terms e.g. 'Payment due strictly one month from date of invoice'. The text entered here will be automatically included at the bottom of all PDF invoices generated from the system.

Client funds

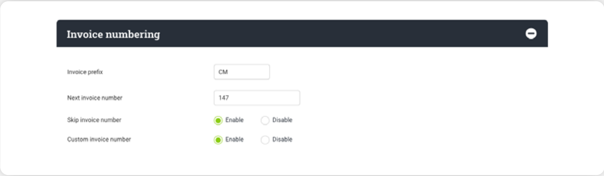
If you've enabled the client funds module on your account, the settings in this section allow you to include details of the client's funds activity on generated invoices.



- **Disbursements on invoice:** If set to enabled, generated invoices will include an itemised list of disbursements from client funds that have occurred during the invoiced period.
- **Show balance:** If set to enabled, generated invoices will show details of the net balance of client funds held at the start and end of the invoiced period.
- **Show movement:** If set to enabled, generated invoices will include details of total amount paid into the client's funds account during the invoiced period and the total amount paid out of the client's funds account during the invoiced period.

Invoice numbering

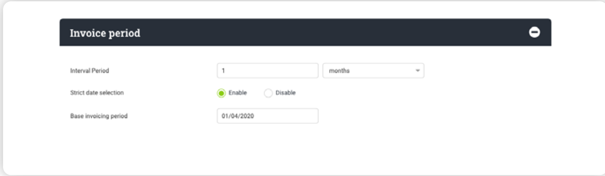
When you generate invoices, the system will automatically suggest the next sequential invoice number to use for each invoice.



- **Invoice prefix:** Allows you to specify a prefix that should be used at the start of all invoice numbers generated by the system. For example, if you set the invoice prefix at 'CM', invoice numbers would be generated in the format 'CM00001'.
- **Next invoice number:** Allows you to specify the number that your invoice numbering on Qunote should start from. For example, if you specified 830 in the field, when you generate your next invoice from Qunote, the system would suggest the invoice number 00830 for you to use.
- **Skip invoice number:** If enabled, you will have the option to skip the invoice number suggested by the system when generating an invoice. For example, if the system suggested the invoice number 830, you could skip this and assigned the number 831 instead.
- **Custom invoice number:** If enabled, you will have the option to reject the invoice number suggested by the system when generating an invoice, and assign your own custom invoice number instead.

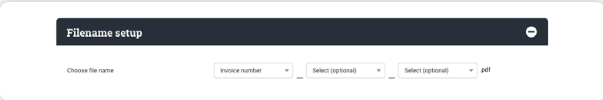
Invoice period

The settings in this section allow you to define you default invoice interval period.



- **Interval period:** Specify your usual invoicing interval period using these fields. The interval period you specify here will determine the dates that prepopulate in 'Invoice from' and 'Invoice to' date fields each time you go to generate a new invoice.
- **Strict date selection:** If disabled, when generating an invoice you'll be able to manually change the default invoice period prepopulated in the 'Invoice from' and 'Invoice to' date fields, and invoice a custom period instead. If enabled, when generating an invoice you won't be able to manually select a custom period. Instead, you'll choose the period to invoice from a drop-down list of date periods, pre-defined based on your 'Interval period'.
- **Base invoicing period:** If you've enabled 'Strict date selected', specify the date that you want your invoicing periods to start from in this field. This, together with your invoice 'Interval period' set, will determine the period that are available to select when running invoices.

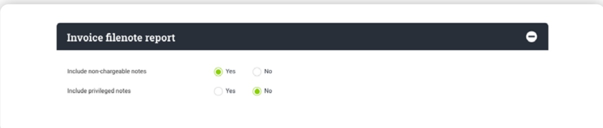
Filename setup



- **Choose file name –** Allows you to set the format of the filename used for PDF invoices generated from the system. You can choose to include things like the client's name, client reference number, invoice reference number and invoice date in the filename via the drop down fields.

Invoice filenote report

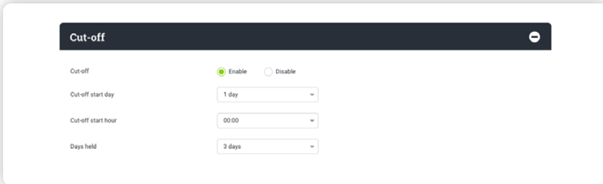
For each invoice that you generate on Qunote, the system also generates a filenote report, which is available for you to download. The filenote report is a Word or PDF document containing all of the filenotes included on an invoice. The date, time, title and full details of each note is included in the document. The settings in this section relate to this report.



- **Include non-chargeable notes:** If set to 'Yes', any non-chargeable filenotes which fall within the same period and services will also be included in the filenote report for each invoice. If set to 'No', non-chargeable filenotes will always be excluded from filenote reports for invoices.
- **Include privileged notes:** If set to 'Yes', filenotes marked as 'Privileged' will be included in the filenote report for each invoice. If set to 'No', any filenotes marked as 'Privileged' will be automatically excluded from filenote reports for invoices.

Cut-off

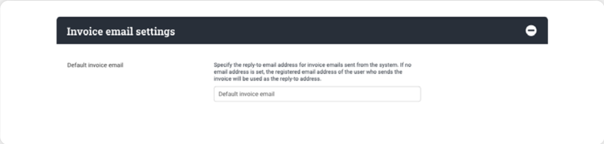
The 'Cut-off' facility allows you place a temporarily block on users adding, editing or deleting filenotes after the end of an invoicing period, to ensure no changes are made to filenotes in that period while you are in the process of running your invoices. Only users with super-admin permissions will be able to edit filenotes while the cut-off period is in force.



- **Cut-off:** If enabled, users will not be able to add, edit or delete filenotes during the last invoicing period for the specified cut-off duration. If disabled, there will be no restriction on users adding, editing or deleting notes after the end of an invoicing period.
- **Cut-off start day:** Choose the number of days after the end of the invoicing period that the Cut-off should start.
- **Cut-off start hour:** Choose the time that the Cut-off should start.
- **Days held:** Choose the number of days that the Cut-off should remain in force for. Make sure you allow enough time for you to run all of your invoices for the period.

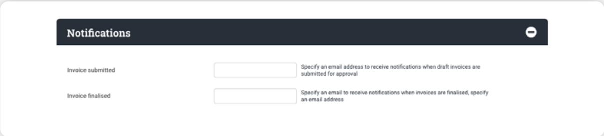
Once an invoice has been finalised, all of the filenotes included on the invoice will be automatically locked for editing except by users with super-admin permissions, even after the cut-off period ends.

Invoice email settings



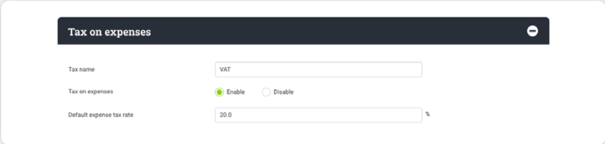
- **Default invoice email:** Allows you to specify a default 'Reply-to' email address for invoices sent out directly from the system using the 'Email invoice' function. If no default address is specified, the registered email address of the user who sends the invoice will be used as the 'Reply-to' address.

Notification



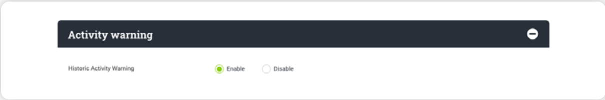
- **Invoice submitted:** If you specify an email address here, a notification will be sent to this address each time a user submits a draft invoice for approval.
- **Invoice finalised:** If you specify an email address here, a notification will be sent to this address each time a user finalises an invoice.

Tax on expenses



- **Tax name:** Allows you to choose the label shown for value added tax on the invoice. By default, the label will be set as 'VAT'
- **Tax on expenses:** Allows you to choose whether tax should be applied to expenses included on invoices. If set to 'Enabled', you will be able to apply a tax rate to each expense included on an invoice. If set to 'Disable', tax will not be applied to any expenses included on invoices.
- **Default expense tax rate:** Allows you to set a default tax rate for expenses included on invoices. You will be able to edit the tax rate applied to each expense at the draft invoice stage.

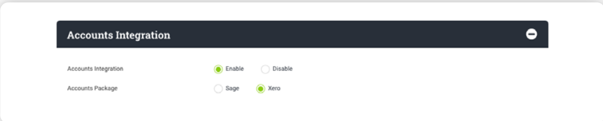
Activity warning



- **Historic activity warning:** If enabled, when running an invoice, if there is uninvoiced chargeable time or expenses that precede the period being invoiced, a warning will display advising you of this.

Accounts integration

From here, you can enable Qunote's accounts software integration facilities, and specify the accounts software that you want to integrate with: Sage or Xero.

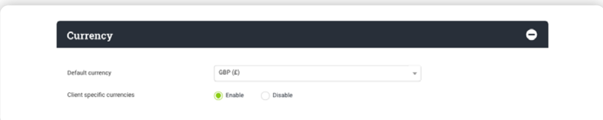


Once you've enabled integration, you'll need to work through the set-up process outlined in our accounts integration set-up guides in order to ready your account for integration. This includes entering things like your different nominal codes, tax codes and account references into Qunote so that these accord with the corresponding values in your accounts software.

Once accounts integration is set-up, you'll be able to export details of your invoices from Qunote to a CSV file formatted as per the requirements of your chosen accounting software. The CSV file can then be directly imported into your accounts software, with the invoices contained automatically added to your sales ledger.

For more information and guidance on setting up accounts integration, please contact us at info@qunote.com

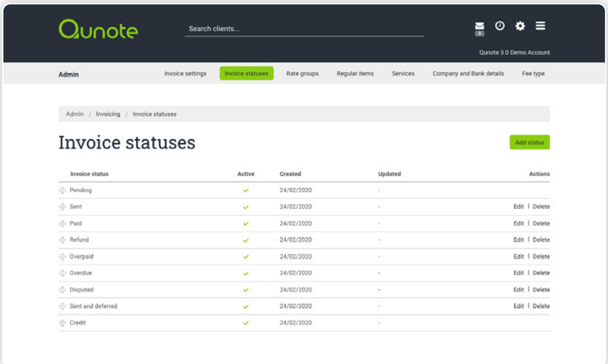
Currency



From here, you can chose a 'Default currency' as well as enable specific currencies for different clients.

INVOICE STATUSES

You can track and update the payment status of generated invoices from within the system, by assigning them to your different 'Invoices statuses' (e.g. 'Sent', 'Paid' 'Overdue' etc.). To view, add and manage your different invoices statuses, go to **Admin > Invoicing > Invoice statuses**.



Adding an invoice status

To add an invoice status, click the **Add status** button in the top right-hand corner. When adding a type, you'll need to specify a title.

Editing and deleting invoice statuses

You can edit or delete invoice statuses from the **Admin > Invoicing > Invoice statuses** page using the **Edit** and **Delete** buttons on the right-hand side.

You can also change the order in which invoice statuses show in drop down lists throughout the system by clicking the icons to the left-hand side of each status and dragging them into your desired order.

SETTING UP YOUR CHARGES AND RATES

From the **Admin > Invoicing > Rate groups** section of the admin section, you can set-up and manage your different charge out rates. The system offers a great deal of flexibility in terms of how you set up your rate structure, allowing you to create different rates for different clients, as well as different charges for different activities, clinicians or services.

When you initially sign up to the system, a default 'Rate group' will be created for you based on the information you enter during the account registration process. This will be displayed on the **Admin > Rate groups** page, and will be called 'Group 1'. Usually, you should be able to set-up all of your different client rates and activity charges using this single rate group, and so won't need create any further rate groups. The only instance where creating additional rate groups might be necessary is if you have different groups of clients receiving distinct services with very different charging structures. If you think this might apply to you, please contact us to discuss your requirements so we can suggest the best way of structuring your rates.

In the vast majority of cases, you will be able to set up different rates and activity charges under the default 'Group 1' rate group. The instructions below detail how to set up your charges for different activities or clinicians (called 'charges') as well as different rates for different clients or groups of clients (called 'rates').

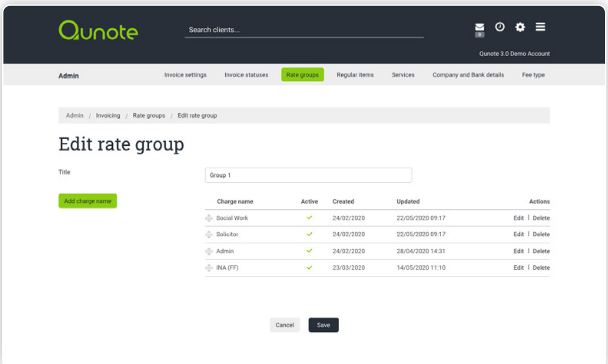
Charges

When your users are adding filenotes to a client's file, they'll assign each filenote a charge via the 'Charge' drop down field within the form. The charge assigned to each filenote determines the rate at which any intervention time, travel and mileage recorded in the filenote is billed when the note is invoiced.

Creating different charge types allows you to bill different types of interventions at different rates. You can structure your charges however you like. For example, you might choose to set-up your different charges for different types of interventions or activity (e.g. Therapy session, Occupational Therapy, Admin) or the member of staff involved (e.g. Case Manager, CM Assistant, Administrator).

Managing your charge types

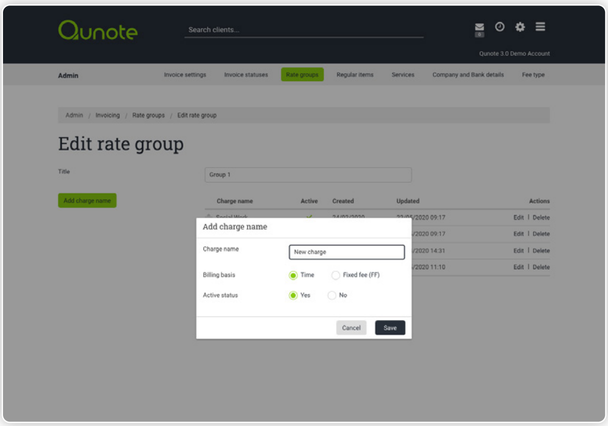
To view, add, edit and delete your different charges, go to **Admin > Invoicing > Rate groups**, and click the **Edit** button to the right-hand side of your default 'Group 1' rate group (positioned under the 'Actions' column). You'll be taken to the 'Edit rate group' page, where a list of your existing charge types will be displayed.



Adding charge types

If you want to add a new charge type that users can select when adding filenotes, click the **Add charge name** button on the left-hand side of the page. When adding a new charge type, you'll need to specify:

- **Charge name:** Specify your name for the charge. This will be used to identify the charge in the 'Charge' drop down field of the filenote form.
- **Billing basis:** Choose between Time (£/hour) or Fixed Fee. If set to time, filenotes assigned to the charge will be billed on a £/hour basis, based on the intervention time recorded in the filenote and the £/hour rate specified for the charge. If set to fixed fee, filenotes assigned to charge will be billed at the fixed fee rate specified for the charge, irrespective of the duration of intervention time recorded.



Once you've added your charge, you'll then need to go through an assign a value to it for each of your different rates. See the 'Managing your rates' section below for guidance on how to do this.

Editing and deleting charge types

You can edit or delete charge types from the **Admin > Invoicing > Rate Groups > Edit Rate groups** page using the **Edit** and **Delete** buttons to the right-hand side of each charge type.

You can also change the order in which charge types show in the 'Charge' drop-down field of the filenote form by clicking the icons to the left-hand side of each charge type and dragging them into your desired order.

Rates

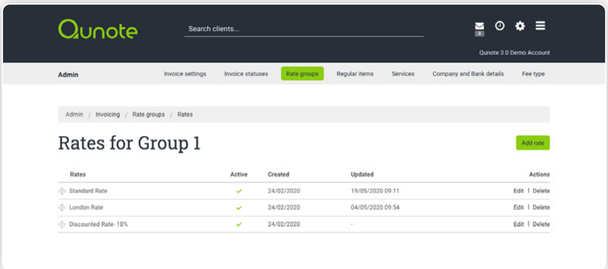
When adding clients to the system, you'll assign each to a particular 'Rate'.

A 'Rate' is essentially a set of values for your different charges, and so the rate assigned to each client will determine the actual values charged on invoices that you generate for them. For example, let's say you have charges for 'OT' and 'Admin', but want to charge these out at different rates depending on whether a client is based in the north or south. In these circumstances, you could create a rate called 'North' with charges of, for example, £80/hour for OT and £60/hour for Admin, and a rate called 'South' with charges of, for example, £70/hour for OT and £50/hour for Admin. When adding each client to the system, you would assign them either the 'North' or 'South' rate, which would determine how much they are charged for recorded OT and Admin time.

You can create as many different 'Rates' as you need, and structure these however you like.

Managing your rates

To view, add, edit and delete your different, go to **Admin > Invoicing > Rate groups**, and click the **Rates** button to the right-hand side of your default 'Group 1' rate group (positioned under the 'Actions' column). You'll be taken to the 'Rates for Group 1' page, where a list of your existing rates will be displayed.



Adding rates

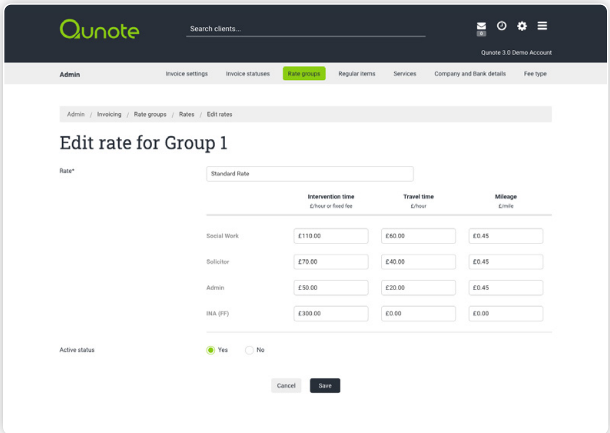
If you want to add create a new rate, click the **Add rate** button in the top right of the page.

When adding a rate you'll need to specify a title, and then set the charge out values for each of your different charge types under the rate. For each different charge type, you'll need to specify a £/hour or fixed fee charge out rate for intervention time, as well as £/hour rate for any recorded travel time and a £/mile rate for any recorded mileage. If you don't charge out for travel time and mileage, simply set these fields to zero.

Once you've created your new rate and set the values for each different charge type, you'll be able to assign the rate to new clients when adding them to the system, or to existing clients by editing their details.

Editing and deleting rates

You can edit or delete rates from the **Admin > Invoicing > Rate Groups > Rates** page using the **Edit** and **Delete** buttons to the right-hand side of each rate.



You can also change the order in which rates show in drop down lists throughout the system by clicking the icons to the left-hand side of each rate and dragging them into your desired order

REGULAR ITEMS

When creating invoices, the system allows you to add fixed fee items to each invoice in addition to the charges related to intervention time, travel and mileage. If there are fixed-fee items that you regularly charge for, such as an INA, you can set these up as ‘Regular items’ by going to **Admin > Invoicing > Regular Items**. Regular items that you set-up can be added to draft invoices at the click of a button, saving you from having to re-enter information about the item each time that you want to include it on an invoice.

Adding a regular item

To add a regular item, click the **Add regular item** button in the top right-hand corner. When adding a regular item, you’ll need to specify the following:

- **Title**
- **Amount:** Enter the amount that you want to charge for the item
- **Position:** Choose where you would like the item to appear on any invoices that it is included on: Pre- or post the invoice total
- **Tax rate:** Specify the tax rate that should be applied to the item

When a regular item is added to a draft invoice, the title, charge, position and tax rate for the item will pre-populate based on the values specified in these fields, but these details can be edited by the user if required.

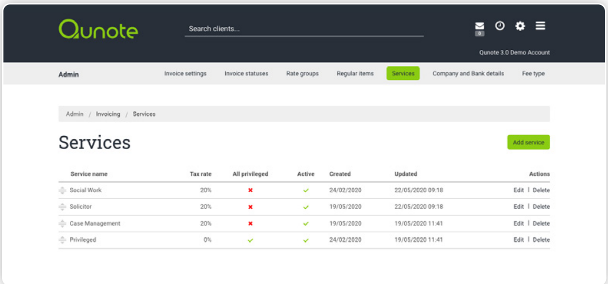
Editing and deleting regular items

You can edit or delete regular items from the **Admin > Invoicing > Regular items** page using the **Edit** and **Delete** buttons on the right-hand side.

You can also change the order in which regular items show in the drop down list in the draft invoice form by clicking the icons to the left-hand side of each item and dragging them into your desired order.

SERVICES

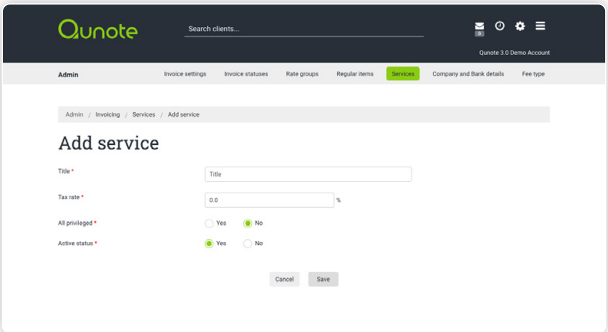
From the **Admin > Invoicing > Services** section, you can add details of the different services that you offer (e.g. Case Management, Occupational Therapy, Neuropsychology etc.). A default service will have been created for you based on the information you entered during the account registration process, but you can add further services if required.



If you offer multiple services, when adding filenotes to the system you’ll assign each filenote to the service that it relates. When generating invoices for clients, the system allows you to choose which services to include on the invoice, thereby allowing you to invoice different services separately in cases where a client has been receiving multiple services over the same period.

Adding a service

To add a service, click the **Add service** button in the top right-hand corner.



When adding a service, you'll need to specify the following:

- **Title**
- **Tax rate:** Specify the tax rate that should be applied to all time, travel time and mileage charges assigned to the service
- **All privileged:** If set to 'Yes', when the user assigns a filenote to this service, the 'Privileged' checkbox field in the filenote form will be automatically ticked. This is useful if you want all filenotes assigned to a particular service to be marked as privileged, and can help mitigate against users accidentally forgetting to tick the 'Privileged' checkbox.

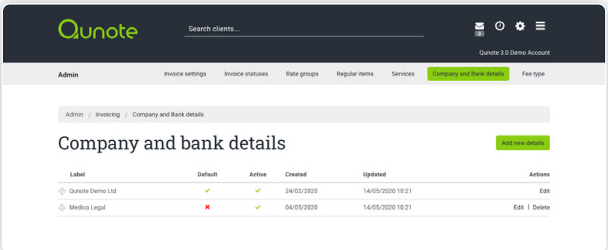
Editing and deleting services

You can edit or delete services from the **Admin > Invoicing > Services** page using the **Edit** and **Delete** buttons on the right-hand side.

You can also change the order in which services show in the drop-down field within the filenote form by clicking the icons to the left-hand side of each service and dragging them into your desired order.

COMPANY AND BANK DETAILS

From the **Admin > Invoicing > Company and bank details** section, you can add details of your company and bank account information that should be displayed on invoices that you generate from the system.

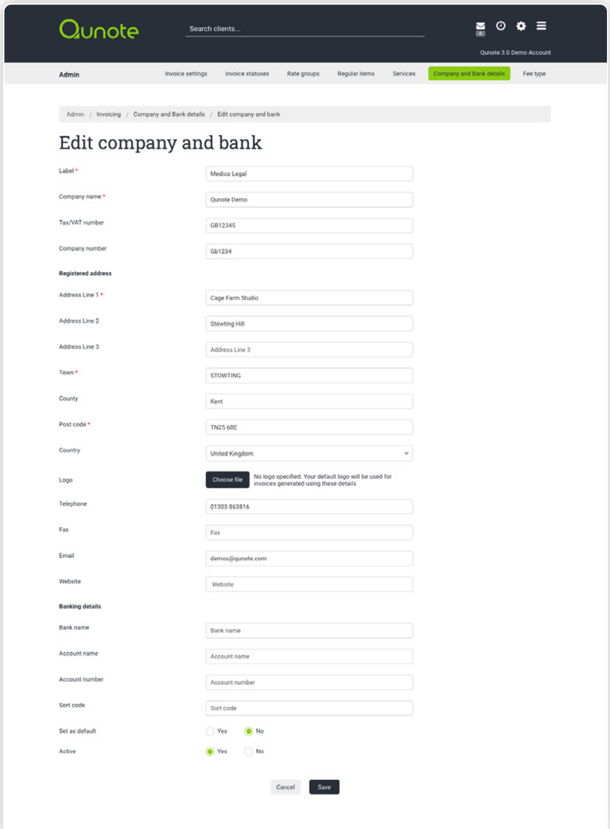


A default set of 'Company and bank details' will be created for you based on the information entered during the account registration process, labelled with your company name. If you want all of the invoices that you raise in the system to include the same company details, logo and bank account details, you'll only ever need to edit this default details set, and won't need to create any additional details sets.

If you do need to produce invoices displaying different sets of company or bank details, such as if you offer different services under different trading names, or wish receive payments for different services into different bank accounts, you can do this by creating multiple sets of 'Company and Bank details'. Once set up, you'll be able to choose which set of details to include each time that you generate an invoice.

Editing your default set of Company and bank details

Before raising your first invoice, you should first edit your default set of Company and bank details to add information such as you company number, VAT number, website URL, bank account details and logo so that these show within the invoice template. To do this, go to **Admin > Invoicing > Company and bank details**, and click the **Edit** button to the right-hand side of the default set of details labelled with your company name.



Adding additional sets of Company and bank details

If you do wish to add an additional set of company and bank details, go to **Admin > Invoicing > Company and bank details** and click the **Add new details** button in the top right of the page.

When adding a set of details, you'll need to specify the following information that should be included on any invoices generated using the details set:

- **Label:** Specify a label to use to identify the set of details
- **Company name**
- **Tax/VAT number:** You can leave this blank if you don't want to this information.
- **Company number:** You can leave this blank if you don't want to this information.
- **Registered address**
- **Logo:** Click the **Choose file** button to upload the logo that should be included on any invoices generated with this details set. If you don't upload a logo for a set of details, any invoices generated with these details will display your default logo uploaded from the **Admin > Account information** page.
- **Telephone**
- **Fax**
- **Email address**
- **Website URL**
- **Bank account details**

Deleting sets of Company and bank details

You can delete sets of Company and bank details from the **Admin > Invoicing > Company and bank details** page using the **Delete** buttons on the right-hand side.

FEE TYPES

The **Admin > Invoicing > Fee types** section of the admin area is used for setting your Qunote account for integration with compatible accounting packages, and is only accessible when accounts integration is enabled.

If you wish to enable accounts integration, and would like further information and guidance on the set-up process, please contact us at info@qunote.com

HR

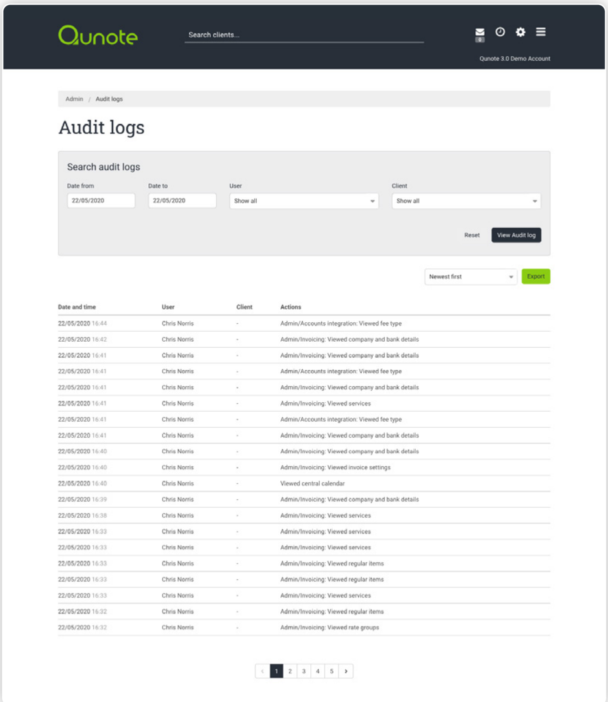
The system includes a dedicated HR database, allowing you to add and maintain HR Records for each of your employees.

From the ‘HR’ section of the admin area, you can edit your different settings in relation to HR database. This includes adding different training and skill types, adding custom fields for recording information against records, and adding different categories of HR documentation.

AUDIT LOGS

To generate an audit log go to the **Admin > Audit Logs** and specify the period that you want to view using the date fields at the top of the page, and click the **View Audit log** button. You can also filter the activity shown by user and client if required.

You can export audit logs to Excel by clicking the **Export** button in the top right of the page



ACCOUNTS INTEGRATION

The system contains an 'Accounts integration' facility, allowing you to export details of your invoices from Qunote to a CSV file formatted as per the requirements of compatible accounting software (Xero and Sage). The CSV file can then be directly imported into the accounts software, with the invoices contained automatically added to your sales ledger.

Accounts integration can be enabled from the 'Invoicing' section of the admin area. Once you've enabled integration, you'll need to prepare your account for integration by going to **Admin > Accounts integration**. This includes entering things like your different nominal codes, tax codes and account references into Qunote so that these accord with the corresponding values in your accounts software.

For more information and guidance on setting up accounts integration, please contact us at info@qunote.com

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