
NPA Works

Training

Manual

Table of Contents

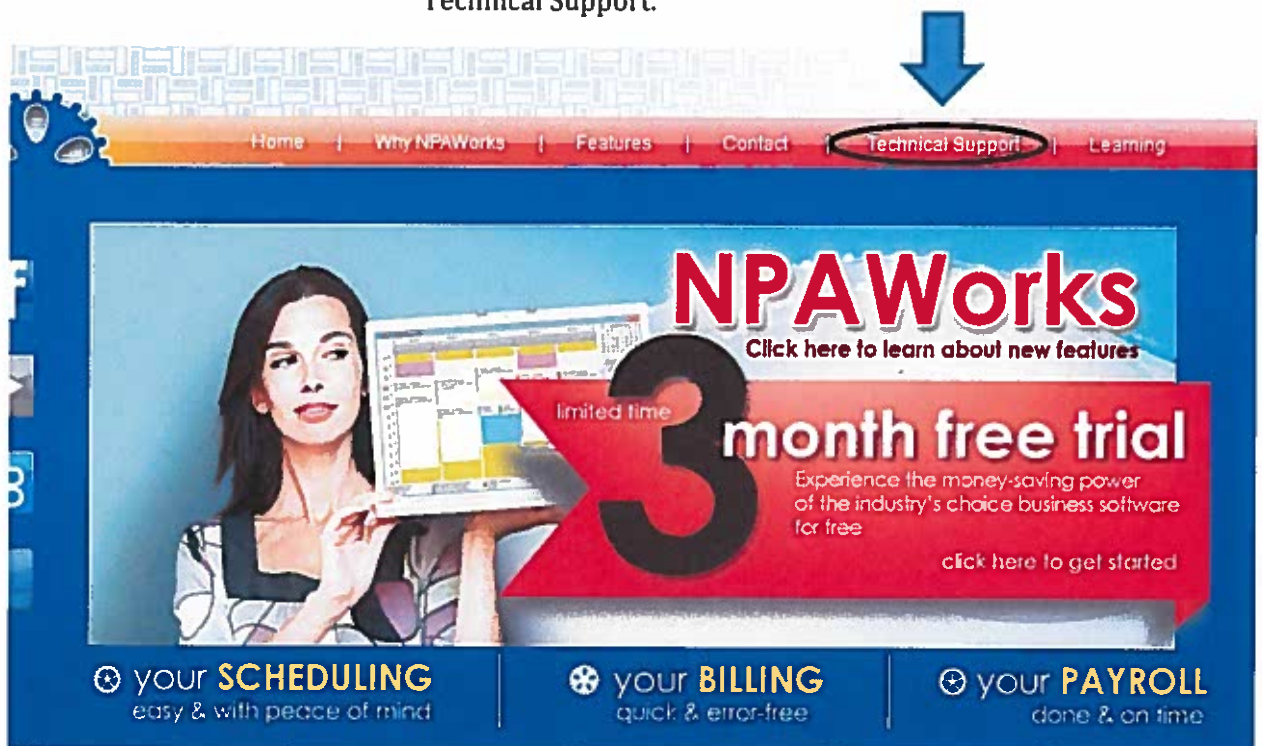
Signing into NPA Works.....	3
Taking a Look at NPA Works.....	5
Scheduling an Appointment.....	8
Rendering an Appointment.....	11
Locking Your Schedule.....	14

Signing-In to NPA Works

The first thing you will need to do is **sign into** NPA Works. The way in which you sign in will depend on what type of computer you are working with. If you have a PC the program will run of Internet Explorer. If you have a MAC you will need to download a receiver in order to run the program.

If you have a PC go to <http://codemetro.com:4336> using Internet Explorer. Once on the page click 'run' and sign in using your personal user id and password.

If you have a Mac you will first need to go to www.codemetro.us. At the top of the page click on 'Technical Support.'



Scroll to the very bottom of the Technical Support Page. Click on the download link for the 'Citrix Receiver.'

For Mac OS 10.5 NPAWorks 360 Users

Please download the required receiver by clicking the link below

[NPAWorks 360 Mac Receiver](#)

The receiver will begin to download. Click 'continue' through the remaining installation windows. Close the window once the installation is complete. After completing the installation, open your web browser (either Mozilla Firefox or Safari is recommended.)

After you have downloaded the Citrix receiver it is time to sign-in. Each time you sign into NPA Works with your Mac you will go to <https://citrix.codemetro.com> . This link will take you to the Citrix login page. Here you will log in with the ABLS company username and password.

Username: [Contact Admin for company Username](#).

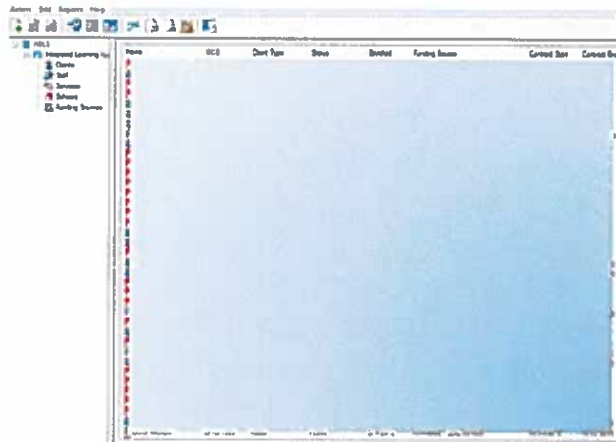
Password: [Contact Admin for company Password](#).

*Please note that these are case sensitive. And the username has a forward slash \ not a backslash /.

This will take you to the company's NPA Work's website. Click on the ABLS logo. This will bring up another sign in window. This window is where you will use your personal username and password.

Taking a Look at NPA Works

Once you have signed into NPA Works, the program will automatically open to your client page.



Your client list will only show the clients that you are assigned to. (If you are awaiting case assignments you may not have any listed at this time.)

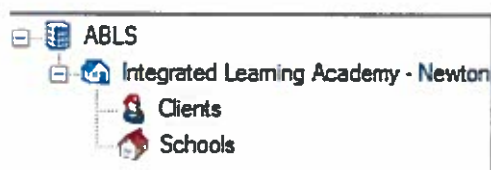
You will notice that along the top of the page there are a number of icons. The two icons that will be most important to you are listed below:



The **driver's license** icon is where you go to change your **password**.

The **'planner'** icon with the green pin in it is your **schedule** and is where you will go to submit your

There is also a list of options along the left hand side of the page:



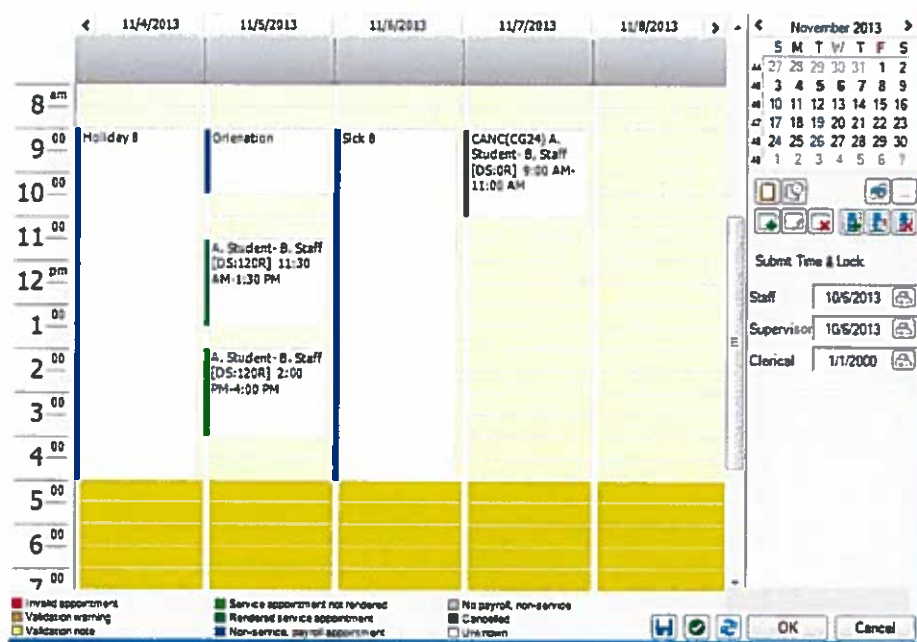
When you click on 'Integrated Learning Academy of Newton' it brings up a list of staff reference documents:

Type	Summary	Expiration	Warn Exp	Attachment	Author	Date Authored	Last Editor	Last Updated
ILAH Staff Ref Docs	12-13 ILAH School Calendar	12/31/2013	Yes	2012-2013 calendar review	Arda, Corrie	1/11/2013	Arda, Corrie	6/20/2013
ILAH Staff Ref Docs	ILAH & ABLIS Holiday Schedule	12/31/2013	Yes	2013 Holiday Schedule.doc	Arda, Corrie	1/3/2013	Arda, Corrie	1/11/2013
ILAH Staff Ref Docs	ILAH & ABLIS Payroll Schedule	12/31/2013	Yes	2013 Biweekly Payroll schedule	Arda, Corrie	1/3/2013	Arda, Corrie	1/11/2013
ILAH Staff Ref Docs	SEP Calendar & Holiday Schedule	8/30/2014	Yes	Social Enrichment Program	Arda, Corrie	1/11/2013	Arda, Corrie	7/25/2013
ILAH Staff Ref Docs	13-14 ILAH School Calendar	12/31/2014	Yes	2013-2014 calendar.doc	Arda, Corrie	6/20/2013	Arda, Corrie	6/20/2013
ILAH Client Consent Forms	Consent Form - Release/Share Information			ABLS-ILAH Consent form d	Arda, Corrie	1/25/2013	Arda, Corrie	1/25/2013
ILAH Client Consent Forms	Permission to Transport Students-Safety Assessment must			ABLS-ILAH Permission to T	Arda, Corrie	1/25/2013	Arda, Corrie	1/25/2013
ILAH Client Consent Forms	Permission to use Protective Measures			ABLS-ILAH Protective Meas	Arda, Corrie	1/25/2013	Arda, Corrie	1/25/2013
ILAH Client Consent Forms	Permission to Use Tape Students			ABLS-ILAH Permission to V	Arda, Corrie	1/25/2013	Arda, Corrie	1/25/2013
ILAH Client Consent Forms	Transportation Safety Assessment - must be done before tra			ABLS-ILAH Transportation s	Arda, Corrie	1/25/2013	Arda, Corrie	1/25/2013
ILAH Correspondence	Cony Log			Cony Log.xlsx	Betz, Becky (Pe	5/16/2013	Hatha, Jessica	10-9-2013
ILAH NPA Works Docs	NPA Works How to			How to Render All Appoint	Arda, Corrie	1/25/2013	Arda, Corrie	1/25/2013
ILAH NPA Works Docs	NPA Works How to			How to Schedule Appointm	Arda, Corrie	1/25/2013	Arda, Corrie	1/25/2013
ILAH NPA Works Docs	NPA Works Introduction			NPA Works Introduction.doc	Arda, Corrie	1/25/2013	Arda, Corrie	1/25/2013
ILAH Staff Ref Docs	Admin Staff Responsibilities			ILAH-ABLS Admin Staff Re	Wheatley, Coely	9/20/2013	Wheatley, Coely	9/20/2013
ILAH Staff Ref Docs	Health & Dental Ins. rates			Health & Dental Insurance	Arda, Corrie	1/3/2013	Arda, Corrie	1/3/2013
ILAH Staff Ref Docs	How Behavior Tech Feedback Form			Behavior Tech Blaise Feed	Nardi, Micah	8/23/2013	Nardi, Micah	8/23/2013
ILAH Staff Ref Docs	NPA Works Access for Non PCs			NPA Works Access for No	Wheatley, Coely	7/29/2013	Wheatley, Coely	7/29/2013
ILAH Staff Ref Docs	NPA Works Access for PCs			NPA Works Access for PC	Wheatley, Coely	7/29/2013	Wheatley, Coely	7/29/2013
ILAH Staff Ref Docs	NPA Works Set Up for the iPhone			NPA Works Set Up for the	Wheatley, Coely	7/29/2013	Wheatley, Coely	7/29/2013
ILAH Staff Ref Docs	Paycheck Stub on the access			ABLS-ILAH Access to iPay	Arda, Corrie	1/3/2013	Arda, Corrie	1/3/2013

Here you will find documents to download that will help you with:

- NPA Works
- Checking your pay stubs online
- And much more...
- Payroll dates and schedule
- Holiday Schedule

Each week you will be responsible for submitting your hours using NPA Works. Your hours must be entered before **midnight on Sunday**. You will be submitting your hours by entering and rendering appointments in your schedule. Once this is done, you will lock your schedule to indicate that is complete.



As you will notice there are a number of different colored appointments in this schedule. Let's take a look at which each of them mean:



Blue Appointments are the most basic appointments. They indicate times when you are getting paid, but you have not worked with a student. Examples of times when you would make a blue appointment include: orientation, training, overlap with another DS staff member or approved Program Development. (If you are a full time staff member, you will use blue appointments to indicate when you are using Paid Time Off such as sick, holiday, vacation, etc.)

Green appointments are for when you are working with a student, therefore they are the ones you will be using most often. A **light green** appointment indicates that a session is scheduled at that time. A **dark green** appointment indicates that you have completed that appointment.

Black appointments are those that have been cancelled- either by client or by staff.

Orange and Red appointments are ones with errors. A **red** appointment is an invalid appointment that will prevent you from saving your work. Un-render this appointment and it will turn **orange**. You will then be able to save your appointment and email administration to have it fixed. (All emails should be sent in before midnight on Sunday.)

Scheduling Appointments

To schedule an appointment, double click anywhere on that day of service:

General **Service Actions**

Date 11/05/2013

Start Time 9:00 AM

End Time 10:30 AM

Duration 1.50 Hrs

Recur Appointment

Apply changes to...

Just this one

This one & later siblings

All sibling appointments

Status ACTIVE

Subject Orientation

Location

Allow overlapping client appointments Allow overlapping staff appointments

Office Notes

Activity

Results

1000

Pay Code Salary

Travel Mileage 0.00

Delete OK Cancel

This will bring up the **General Appointment Screen**. Here you will be able to adjust the appropriate time of your service. This is also the screen where you will check to confirm that you have the correct pay code from the drop down box.

*If you are making a **blue appointment**, you can click 'OK' and the appointment will appear blue in your schedule. If you are scheduling an appointment with a student you will click the **Service Action Tab**.

When on the **Service Action Tab** you will click 'Select' so you can choose which student you are working with.

The screenshot shows the 'Appointment' window with the 'Service Actions' tab selected. The 'Select' button is circled in blue. The window contains several sections: 'Authorized Service' with fields for Client, Birth Date, Contract, Note, Service, Frequency, Serv. Loc, Auth Num, and Note; 'Delivery Details' with a dropdown for Type of Time, Service Time (0), a checkbox for 'Service has been rendered', Co-Pay (\$0.00), and a dropdown for Service Log Entry; and a 'Collected (\$)' field with the value 0.00. At the bottom are buttons for Delete, OK, and Cancel.

When you press select a list of all your clients will pop up. Choose the one you are want and click 'OK'.

The screenshot shows the 'Authorized Services' dialog box. A blue arrow points to the dialog box. The dialog box has a search area with fields for First Name, Gender, Last Name, Status, Type, Funding Source, and PS Type. Below is a table with columns: Last Name, First Name, CLS, Auth Num, Funding Source, Claim Stage, Claim Date, Service, Auth Min, and Pay. The 'OK' button at the bottom right is circled in blue.

The student's name and billing information will automatically prefill into the appointment screen. Verify here that you have selected the right student and service.

Appointment

General Service Actions Insurance Billing

Clear Select

Authorized Service

Client A Student Birth Date 1/29/2001

Contract Blue Cross/Blue Shield 2/1/2013 - 2/22/2014

Note

Service Direct Service 2/1/2013 - 2/22/2014

Frequency [TOTAL] Auth. Minutes 54720

Serv Loc. Comp. Time Bank 0

Auth. Num. 98317ERW00 Diagnostic Code 299.00

Note

Delivery Details

Type of Time Regular Time Service Time 90

Service has been rendered.

Co-Pay - \$0.00

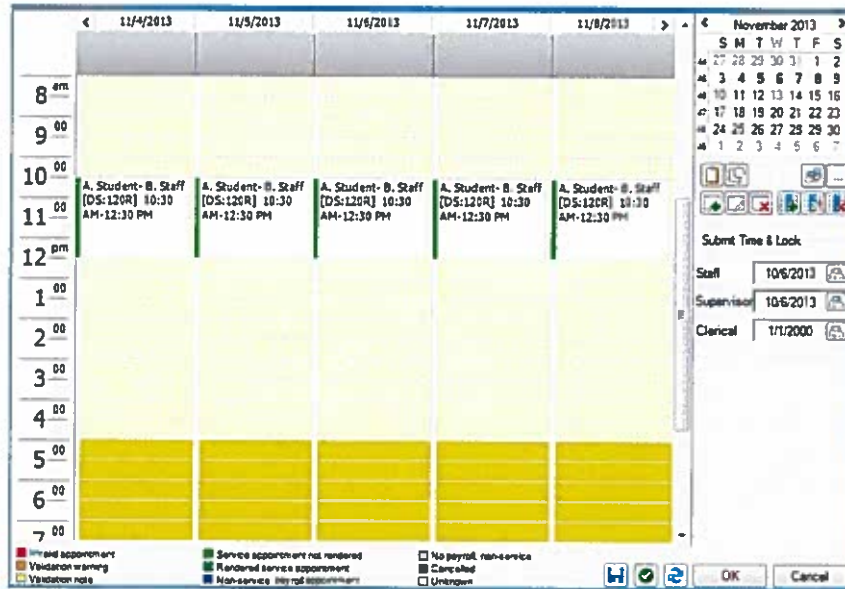
Service Log Entry Collected (\$) 0.00

Delete OK Cancel

Once you have done this, click 'OK' and the appointment will appear **light green** in your schedule. *Remember that a light green appointment is a scheduled appointment. It is not a completed appointment.

Rendering Appointments

After you have entered all of the appointments, it is time to render them. This is the process in which your light green appointments will become dark green.



You have 2 options when it comes to rendering appointments. You can open the individual appointments and select 'Service has been rendered.'

Appointment

General Service Actions Insurance Billing

Date 11/05/2013 Recurrence

Start Time 10:30 AM Apply changes to...
End Time 12:30 PM
Duration 2.00 Hrs

Status ACTIVE

Subject A. Student - B. Staff [DS:120R] 10:30 AM-12:30 PM

Location

Allow overlapping client appointments Allow overlapping staff appointments

Office Notes

Activity

Results

1000

Type of Time Regular Time Service Time -120

Service has been rendered.

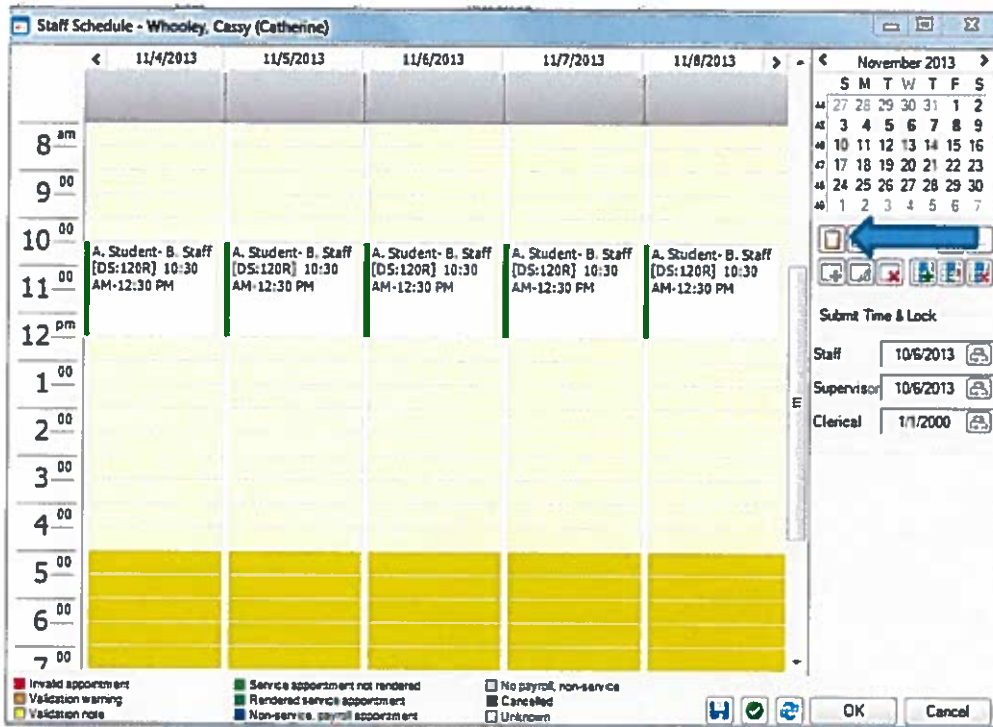
Service Log Entry

Pay Code Salary Collected (\$) 0.00

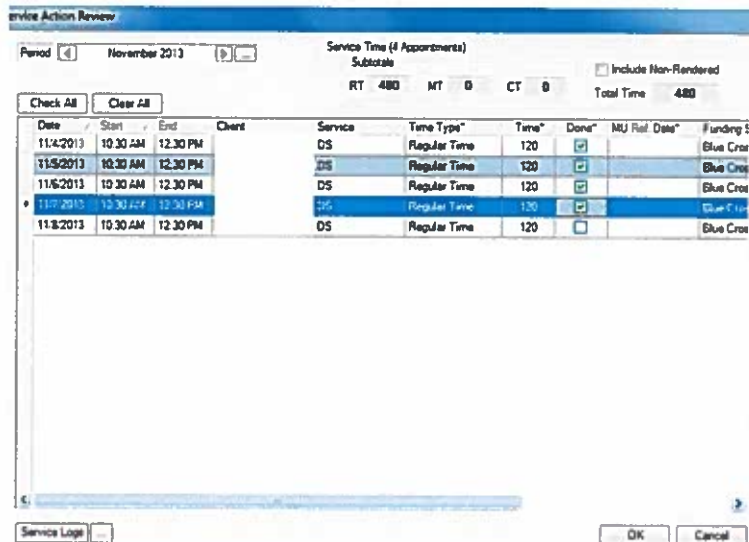
Travel Mileage 0.00

Delete OK Cancel

Or you can click the 'Clipboard icon' on the right hand side of the screen.

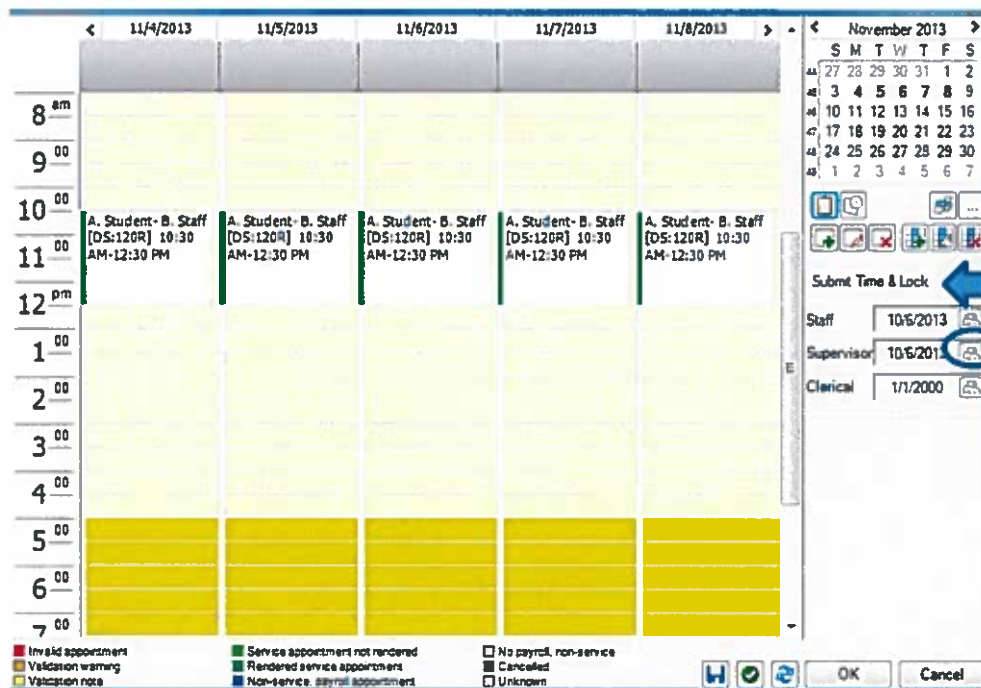


This will bring up a window that contains your entire months' worth of appointments. You can then check them off on the list as being 'Done'. When you are finished, click 'OK' and it will render them all at once.



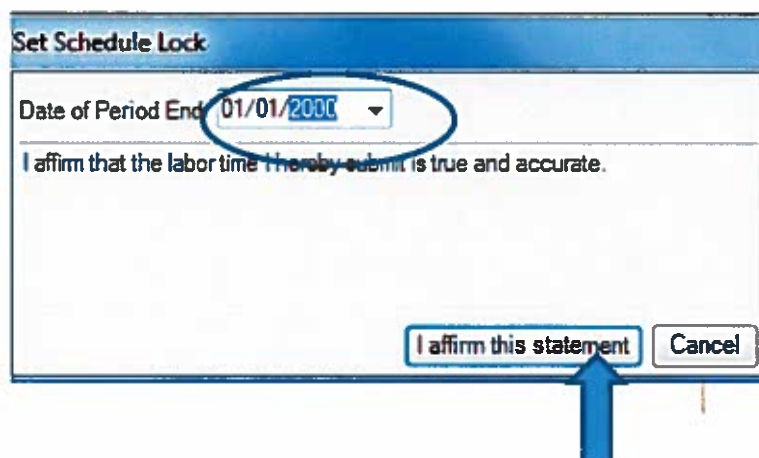
Locking Your Schedule

Now that all of your appointments are rendered, it's time to lock. Locking your schedule tells us that it is complete and ready to be processed for billing and payroll. You are required to lock your fully rendered schedule **each Sunday** and the **final day of the month** by midnight.



To lock your schedule click the 'Combination Lock' icon on the right hand side of the screen. (Where it says Submit Time and Lock.)

A window will appear asking you to confirm that your hours are complete and accurate. It will also ask you to confirm 'the Date of Period End.' Here you will either choose **Sunday's date** or **final date** of the month.



Congratulations! Your schedule is final!

Staff Schedule - Whooley, Cassy (Catherine)

	11/4/2013	11/5/2013	11/6/2013	11/7/2013	11/8/2013
8 am					
9 00					
10 00	A. Student- B. Staff [DS:120R] 10:30 AM-12:30 PM	A. Student- B. Staff [DS:120R] 10:30 AM-12:30 PM	A. Student- B. Staff [DS:120R] 10:30 AM-12:30 PM	A. Student- B. Staff [DS:120R] 10:30 AM-12:30 PM	A. Student- B. Staff [DS:120R] 10:30 AM-12:30 PM
11 00					
12 pm					
1 00					
2 00					
3 00					
4 00					
5 00					
6 00					
7 00					

Invalid appointment
 Validation warning
 Validation note
 Service appointment not rendered
 Rendered service appointment
 Non-service, payroll appointment
 No payroll, non-service
 Cancelled
 Unknown

Submit Time & Lock
 Staff: 1/1/2000
 Supervisor: 10/6/2013
 Clerical: 1/1/2000

OK Cancel