

Thank you for your interest in Microsale's C.H.A.T Counselling System for Private Practice Counsellors.

Please find below instructions for downloading the setup file that will install the latest version of the software onto your computer, and also a brief getting started Guide.

(A) To download and install the trial program:

Go into the following web page link. <http://www.microsalenz.com/search.htm>

Then choose,

- [Microsale C.H.A.T Counselling Program Demo Private Practice Installation](#)

Save the setup file to your desktop (or any folder you wish) and run it (by double-clicking on it) to automatically install the program. Just click on OK or Next when prompted during installation. If there are any hassles at all please give me a call on 03 467 2888 or 027 4861444

Start the Microsale C.H.A.T Counselling System from the icon created on your desktop

The Main Menu screen will appear.

You can view (and print if you wish) the latest manual that explains the features of the program in detail by clicking PDF here.

- Click on Counselling Program to run the program.
- Rebuild Indexes is a program that prevents errors building up in your data files, so run at least once a week.
- Copyfiles automates the Copying of your data to a USB or other backup drive.



Getting Started Guide :

On starting the program from the Main Menu the first screen that will appear is the Main Consultation Screen (See page 3). From here you can access all the features of the program. On first use though you should click on the SETUP button on the top of this form to add your Business Details and set up the program the way you want it.

Step 1 Set up Business Details :

From this screen you may add your address, GST No, Password, counsellor details, Appointment Diary setup etc.

Business Details Screen:

Use the Tab or Enter key on your keyboard key to move between fields or just click on the field you want to change using the mouse. To password protect the program you must enter a password here. You also adapt the program to suit your own needs by adjusting the Headings (Field Names). eg Change Heading 2 from Score to Classification or whatever you want.

Setup Form

Business Detail | Setup | Consultations | Reports

Main Business Detail

BUSINESS NAME MICROSAL NZ

CONTACT NAME Donald Logie

ADDRESS 1 9a Wales St

ADDRESS 2 Maori Hill

ADDRESS 3 Dunedin

EMAIL ADDRESS donald@microsalenz.com

WEB SITE www.microsalenz.com

PHONE (WK) 03 467 2888

PHONE (HM)

FAX

GST NUMBER

GST RATE% 15

PASSWORD

Alternate Headings

CLIENT NAME Clients
Must be "Clients" or "Students"

HEADING1 Reference

HEADING2 Score

HEADING3 Age Group

HEADING4 Consultation Type

HEADING5 Sub Type

Appointments Setup

Std Appt Time: 30
Start Hour: 8
Finish Hour: 17

Appointment Diary Name Donald | **Display Order** 1

Counsellors

Counsellor Name	Code
Donald Logie	1

Delete old Consultations

Letterhead and Notes

These Field Headings can be changed.

Click here once you have entered your Password to Save it permanently..

Step 2 Set up Records for drop-down boxes

Setup Form

Business Detail | Setup | Consultations | Reports

Other

- > Depression
- Referred
- Personal

Score

- > 0-10
- 11-20
- 21-30
- 31-40
- 41-50

Age Group

- 0-10
- 11-15
- 16-20
- > 21-30
- 31-40
- 41-50
- 51+

Ethnicity

- > NZ European
- NZ Maori
- Samoan
- Cook Island Maori
- Tongan
- Niuean
- Tokelauan

Other Issues

- > Attendance Officer Referral
- Family Meeting
- Meeting with Nurse
- Meeting with Police
- Meeting with Truancy Officer
- Meeting with Whanau Leaders
- Nurse Referral

Consultation Type

Type
ACC
DHB
> Family Court
Other
PHO
Supervision

Sub Type

Consultation Type Selected :

Sub Type
Section 9
Section 10(1)
Section 10(4)
Section 19
Section 65

Microsale NZ

Add or Edit Records here for adding to Consultations.

Step 3 Add/Edit Client Information

Click + to add a new client, - to delete.

Hides the Screen – (similar to the minimise button)

Add Support People

Other Party detail :

Party B First/Last Mrs Cathy Logie
 Phone 021 567889 Rel'ship Wife

Child1 Jordan Logie 1985
 Child2 James Logie 1997
 Child3 Tom Logie 1997

Add PartyB as a Client so you can put in all relevant contact detail.

Step 4 Consultations and Family Court Referrals

Family Court Referrals etc

Click on the + to start a new consultation.

Hides sensitive information

See Other Issues (to add to notes)

Using these buttons you can add Notes for later retrieval . Makes the Notes area larger, Add a Word Document as Text, View Fp4's for this client etc.

Print all Notes for a Client.

All Notes for : Don Logie

- 10-03-2011 -- DHB
FAMILY COURT COUNSELLING
Parties: FAM
No:
- 16-03-2011 -- Family Court
Things are better today - no but looking brighter. Will come to ball tomorrow she is enjoying the peer inclusion.
- 10-04-2011 -- Family Court
Still unsure about her long-term family options. Describing family difficulties as everyone else's fault but not really looking at her own behaviour. Will continue to gently tease this out. Monitor.
- 25-05-2011 --> Family Court
Notes are here for all to see. It's got to be clear

Please give me a call with any queries, I'm very happy to help. See the manual for more detail.
 Regards, **Donald, Microsale NZ**