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1. **Introduction**

1.1. **What is DayLite**

DayLite turns your mobile device into a powerful calendar and appointments tool. While out in the field, DayLite allows staff to use a mobile device to manage/update existing appointments, render completed sessions, electronically gather guardian signatures, document appointment outcomes, and lock their schedules. With the new electronic signature capture, NPAWorks will also provide a time stamp and track GPS coordinates of where the signature was captured. With DayLite, you experience the true meaning of “on-the-go” all on your smartphone or tablet.

1.2. **Notes**

- This ‘How-to’ provides a description of all of the components of DayLite. You may or may not have access to all of these functions. The access you have to the components in DayLite is a reflection of the access you currently have to NPAWorks.
- Screenshots shown in this document are from a smartphone device, the lay out of the screen may differ slightly by device. Functionality of features will be the same across all devices.
- Any modifications made to your schedule and security settings will automatically update in DayLite. Refreshing may be needed for updates to appear.

2. **Getting Started**

2.1. **Accessing DayLite**

To access DayLite open up your internet browser and enter your company’s NPAWorks link and add /mobile to the end of it, as shown below:

https://iecp.codemetro.com/mobile

**NOTE:** DayLite can be used on any device (smartphone, tablet, PC, Mac, etc.) and on any web browser (IE, Google Chrome, Firefox, Safari, etc.).
2.2. How to Bookmark the Site
From your device, click on the bookmark icon to add the link to your bookmarks. The process may vary depending on your device.

2.3. How to Add Shortcut to Home Screen
Within the bookmark options, it will also give you the option to add a shortcut to your home screen. The process may vary depending on your device.

2.4. User Account
Use your NPAWorks log-in to access DayLite.

NOTE: DayLite will automatically time-out after 20 minutes of inactivity.
2.5. How to Log Out

To log out of DayLite, click the ‘Sign Out’ button.

3. Calendar View

3.1. What You Will See

Once you have logged in, you will see the calendar view.
3.2. How to Navigate the Calendar

The arrows at the top of the calendar view are used to navigate through the months. The refresh icon updates your calendar with any changes. The ‘Today’ icon will open your schedule to today’s appointment.

The arrows at the bottom of the calendar view are used to navigate through the days within the month.

3.3. Scheduled Appointments

At the bottom of the DayLite screen you will see the appointments that are scheduled for the selected day. Each appointment is color coded to reflect the properties of the appointment. Click the information button to see the color legend below.
4. **Appointments**

4.1. **How to View Scheduled Appointments**

To view details of an appointment, simply click on the appointment to open it. On this screen, there are four tabs: General, Advanced, Service, and Insurance Billing (for insurance funded appointments). Depending on the user’s permission, not all tabs may be visible to the user.

![View Appointment Screen]

4.2. **How to Edit Scheduled Appointments**

To edit an appointment, click on the edit icon from the appointment list.

![Edit Appointment Screen]

Or you can click on ‘Update’ from the ‘view appointment’ screen.
Each field will now be visible to edit. You can navigate through each tab to make any necessary changes.
4.3. How to Render Appointments

To render an appointment, go to the edit view screen of the appointment by clicking on the edit icon from the appointment list or click ‘Update’ from the view appointment screen. Check the ‘Service has been rendered’ box to render.

Once the box is checked, your approximate location and map icon will display. Date, time, and GPS location are recorded when the appointment is rendered. If the user’s device does not have GPS capability, GPS info will be blank for transactions created with that device. Clicking on the map icon will show your approximate location. Click ‘Save’ to save your changes.

NOTE: If the appointment is not locked (depending on the user’s privileges) and the status type is not auto-render, appointments that have previously been rendered can be unrendered by unclicking the render checkbox.
4.4. How to Capture Electronic Signatures for Guardian

To capture guardian signatures, go to the ‘Update Appointment’ screen of the appointment by clicking on the edit icon from the appointment list or by clicking ‘Update’ from the view appointment screen. Scroll down to the Guardian Signature and click on ‘Guardian Verification’.

The Guardian Verification window will appear. The Guardian can use their finger or stylus to sign their name acknowledging the appointment was rendered. You have the option to ‘Clear’ the signature and re-sign.

Click ‘Verify’ to capture the signature and then ‘Save’ to save the change.
DayLite records the user’s name, date, time, and GPS location at the moment the update is saved. If the user’s device does not have GPS capability, GPS info will be blank for transactions created with that device. From this window, you also have the option to ‘Remove’ the signature.

**Note:** If the funding source is a Regional Center, name and relationship are required fields if a signature is entered.

To update any information on the Guardian Signature, go to the ‘Update Appointment’ screen of the appointment by clicking on the edit icon from the appointment list or by clicking ‘Update’ from the view appointment screen. Scroll down and click on the ‘Update Guardian Verification’ button and make necessary updates. Clicking on the ‘Update Guardian Verification’ button will automatically clear the signature and the Guardian must re-sign before the ‘Verify’ button is enabled.
5. **Entering Notes**

1. Once you are on the active appointment screen, scroll down to the "Notes" sections.
   a. There are 3 Notes sections:
      i. Office Notes
      ii. Activity Notes
      iii. Result Notes
2. Click the “+” next to the note section you wish to edit, or enter data into.

When you are finished entering your data:
3. You can continue editing the appointment or, click on the “Save” button to save and close the appointment screen.
6. **Schedule Lock**

6.1. **How to Lock Your Schedule**

To lock your schedule, from the calendar view, click on ‘Lock’.

The ‘Set Schedule Lock’ screen will appear. Select the date you wish to lock and click ‘I affirm this statement.’ The locked as of date on the calendar view will automatically update.