

D. Administrator Help

In order to use the CataLister™ database, the administrator must first input data that is specific to your organization. Begin by clicking on **ADMIN** in the navigation bar at the top of your screen.



This will take you to the Admin Screen where you can edit the look up tables. The Admin Maintenance is made up of the following sections which are listed at the left side of the screen.:

1. Benefits	11. Enrollment Period
2. Events	12. Enrollment Type
3. Event Types	13. Member Products
4. Event Locations	14. Name Suffix
5. Hobbies	15. Physicians
6. Insurance Type	16. Phys Specialty
7. Language	17. Religion
8. Lead Detail	18. Title
9. Lead Source	19. Users
10. Medical Interests	

Begin by editing the look up tables. Click on each link along the left-hand side to access each corresponding area.

1. Benefits

Type each benefit in the box separately, clicking on the **ADD** button after each one. A list will generate on this page of all of the benefits you add. Each benefit will be in a grey rectangle and automatically have a checkmark by it. Checked benefits are available for current use throughout the database.

Below are your selected choices for Member Benefits.

Please click on a benefit to Edit or Delete it. Checked benefits are shown in drop downs.

- Catalyst Vision
- Diabetes supplies
- DME
- LTC
- Medical Supplement
- P.E.R.S

To edit or delete a benefit, simply click on the grey rectangle. You will then be given the option of altering the name or spelling, removing the benefit from all drop down menus, or deleting the benefit completely.

Catalyst Vision

Catalyst Vision (check if used for drop down)

Update

Caution: By Clicking on the delete button you will delete this benefit from ALL members and drop downs.

Delete Catalyst Vision

To alter the name or change the spelling, make corrections to the benefit in the text field and click **UPDATE**. Any spelling changes will be reflected throughout the member records as well as in the drop down menus.

To remove the benefit from all drop down menus, simply uncheck the box beside the benefit and click **UPDATE**. Members with the benefit will retain it in their records, but future use of this benefit will be prevented. You may not permanently uncheck a benefit directly from the Admin Benefits page. You must click on the benefit's rectangle to make any changes to it on the Edit Admin Benefits page or the changes will not be updated.

To delete a benefit, click on the red rectangle. If you delete a benefit, it will be removed from all member records and all drop down menus. Use caution when deleting a benefit, as it is not reversible. You may add the benefit again, but this will not return it to the member records.

2. Events

Events is the next item listed on the Admin Screen. Skip it for now and move on to Event Types.

3. Event Types

Simply add the types of events that you are planning. For instance, you may wish to add EDUCATIONAL, TRAVEL, THEATER, SPORTS, or HEALTH. Or you may wish to add topics such as SCREENINGS, INNOCULATIONS, or AWARENESS.

Type the event type into the box and click **ADD**. Type each one individually, clicking **ADD** after each entry. Event types will be used for a drop down menu for (2.) Events.

Event_Type **Add**

Below are your selected choices for Event Types

Event Types are used in the drop down for events. Example: Health Fair, Seminar. When you delete these items, you are only deleting the drop down choices. The data is still in the Events database.

Education
Health
Inoculations

Event types can be deleted from the drop down menu by clicking on the red box. Once clicked the item disappears from the list. Even though it no longer appears on the drop down menu, the data is still in the Events database.