

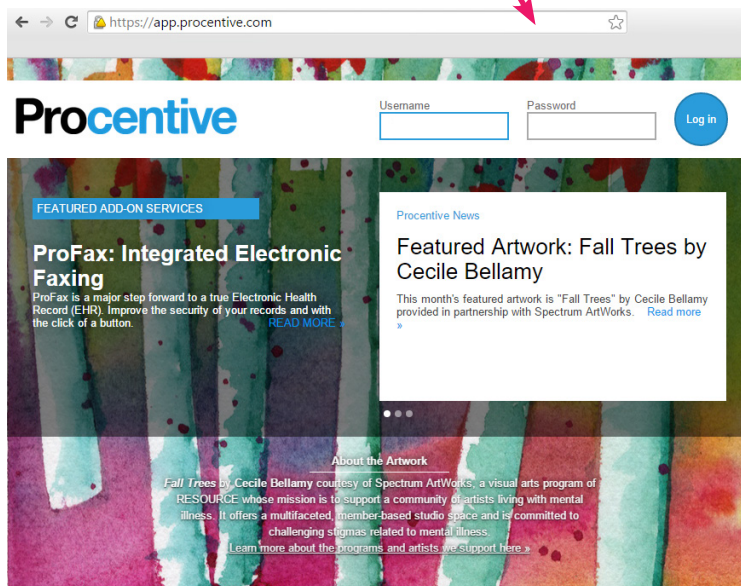


INSTRUCTOR TRAINING
GETTING SET UP

How to Log Into Procentive

1. To access Procentive and setup your personal password **go to app.procentive.com** in your browser. Procentive supports Internet Explorer 11.0 or newer. We also support Safari (for Macs), and Chrome (for Mac or Windows operating systems). The only browser we ask customers to avoid is Firefox Mozilla.

The address bar is right here, by the way.



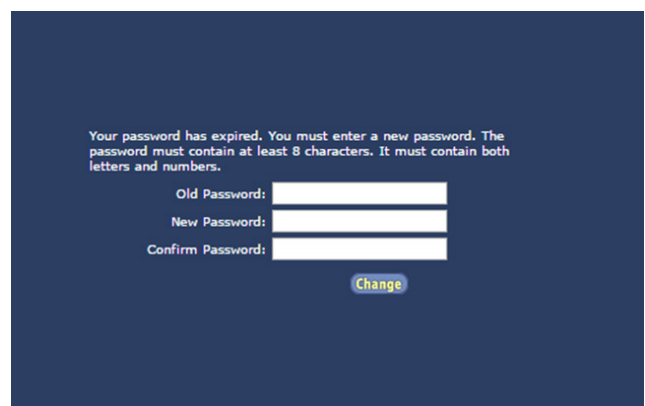
2. **Enter the username and password** that you received via email and then click the “Login” button. The pretty blue circle-button with the words, “Log In”.

You know you’ve done it correctly, when this web page appears.

3. **Create your private password** (the password you will use to login to Procentive from now on). Keep it safe; we don’t want ninja hackers getting into your account.

- **Old Password:** Enter the temporary password you received via email (the one you just used to login for the first time).
- **New Password:** Will need to be at least 8 characters long, contain at least one number and at least one letter.
- **Confirm Password:** Enter your new password again.

4. You’re almost in Procentive! **Click change** and see the magic happen.

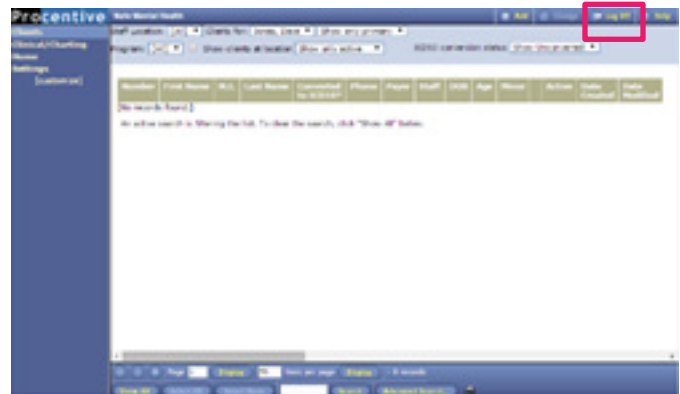


And you are in! If you see the screen to the right, you have successfully logged in to Procentive.

5. As a test, click the “Log Off” button in the upper right portion of the screen. The system will return you to the initial login screen.

Log in again with your new password to make certain it works.


If it doesn't work, give us a hollar.

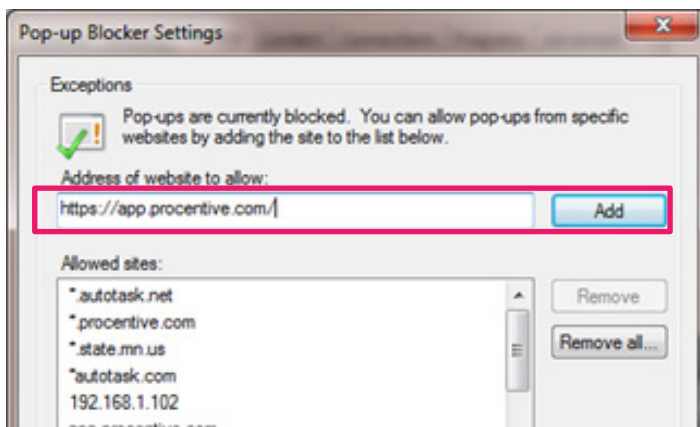
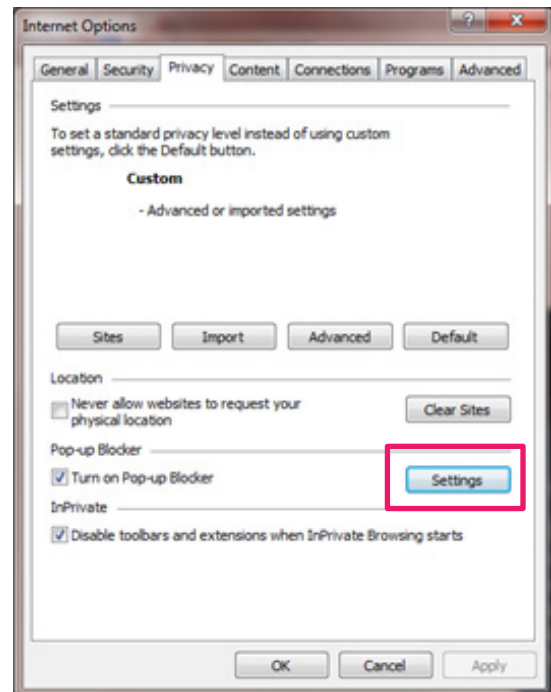


Allowing Procentive Pop-ups


Besides logging in for the first time, you will need to take one additional step before you begin using Procentive. You must take steps to allow pop-ups when using Procentive. Please see the instructions below based on the web browser you are using.

Internet Explorer: Pop-Up Blockers

1. Click on the Settings Gear symbol  at the upper right corner.
2. Choose Internet Options.
3. Go to the Privacy Tab.
4. In the Pop-up Blocker section, click “Settings”.
5. In the Address bar
 - Enter in app.procentive.com
 - Click Add
 - Click Close



Chrome: Pop-up Blockers

1. Click on the lines  in the upper right hand corner.
2. Click on **Settings**. A window will open.
3. Click **“Show advanced settings...”** link
4. In the Privacy section, click **“Content settings...”**
5. Scroll down to **“Pop-ups”**.
6. Click on **“Manage exceptions...”**
7. Insert Procentive’s URL in this section (**app.procentive.com**) and ensure **“Allow”** is chosen in the dropdown next to it.

Hostname pattern	Behavior
app.procentive.com	Allow 

8. Click **Done**.
Voilà! You have successfully allowed Procentive pop-ups. You didn’t know you were so smart? Did you?

Safari: Pop-up Blockers

Information to come.


Navigating Modules

Once you are logged in, you will see “Modules” on the left hand side of Procentive. You will see Clients and Clinical/Charting, and possibly a few others. Each module is dedicated to a specific task.

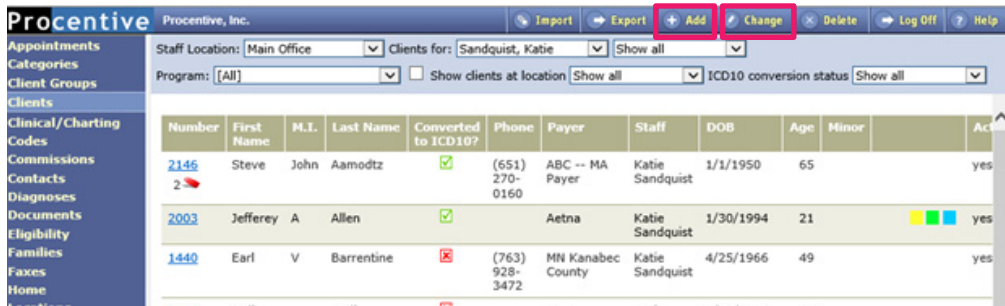
Clients Module is where client demographics are stored.

Clinical/Charting Module is where you will create and edit the Client’s Assessments, Treatment Plans, and other client documents.

Adding/Changing Information

Adding information is simple. To add any new information to any module, you will click the “Add” button  in the upper right corner of the page.

To open any existing information, just double-click on the data itself, anywhere that isn't a blue link. If you are on a tablet, click once on the data so that it becomes highlighted, and then click the "Change" button in the upper right corner of the page.

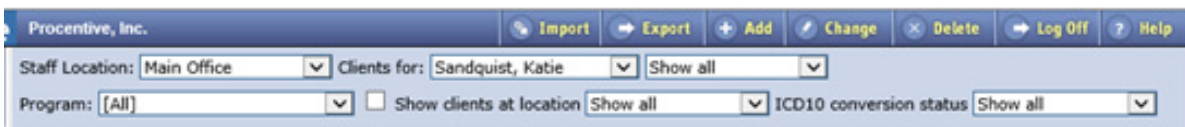


A new window will open and you can begin adding or editing the information.

Search and Filter

In each of the modules, you will also find various filtering and search tools. In the Client module and Clinical/Charting module, the search filters are at the top of the screen.

For most users, these fields should default to show you the information for your clients and any documentation you have recently created.



Pat yourself on the back. You can now say you know how to navigate Modules in Procentive.