ACCUTRACK TUTOR VISITS TRACKING

When you click on Tutor Visits Tracking from the Main Menu, you will see the following options:

- **Who's In:** See which staff members are currently signed into **AccuSQL/AccuTrack**.
- **Sign In:** Manually sign in tutors.
- **Sign Out:** Manually sign out tutors.
- **Edit Sign-in Logs:** View and edit the tutor sign-ins that have been recorded in the system.
- **Tasks:** Create the categories and tasks that tutors can sign into when they sign into the center.
- **Pay Rates:** Used to create different pay types for tutors. You can then assign the pay rates to the different tutors to track their amount of pay based on their work hours or appointments.

WHO'S IN SCREEN

Purpose: Check which tutors and students are currently signed in
Access: From **System Administration > Tutor Visits Tracking**, click on "Who's In".

The **SuperTable** in the screen lists signed-in users in alphabetical order by last name. For each user, you will see the date and time of the sign in and the task, tutor, etc. You can sort the list by clicking on and off the header columns. You can also right-click on the grid (as you can with any **SuperTable**).

To filter on certain values, export the data directly to Excel, etc. Click the Tutors radio button to toggle to sign in tutors.

To see a list of users who are signed out, click on the "Show Out" button. If you have student and tutor photos loaded in, you can click the **Show pictures** checkbox to see a photo of the student or tutor you currently have selected in the list.

You can make the "Who's In" screen accessible to students by selecting the "Who's In" checkbox in the *Sign-in Setup > Setup > Welcome Screen Options* screen. You can also set this up so students can only see the sign-in status of tutors and not of other students.

SIGN IN (TUTORS) SCREEN

Purpose: To manually sign tutors into **AccuSQL/AccuTrack**.
Access: From System Administration, click Tutor *Visits Tracking > Sign In*.

You can use this screen to manually sign tutors in. This could be used if a tutor forgot to sign in or was for some reason unable to sign in. It is also a quick way to sign in multiple tutors at one time.

Here are the steps for manually signing in tutors:

1. Select one or more tutors using the Selection List Boxes.
2. Select the Category from the "Category" drop-down box.
3. Select the Task from the "Task" drop-down box.
4. Enter the sign-in date and time.
5. (Optional) If you want to sign the student out too, enter the length of the sign-in session.
6. Click on "Sign In". You will see a confirmation message:
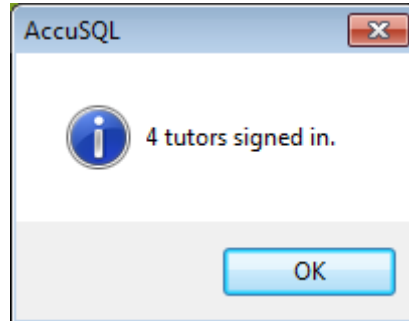
When you launch this screen, the date and time box will show the current date and time. If you want to sign students in at a different date and/or time, change the values in this text box by typing values in, or you can use the Calendar by clicking on the box with the right mouse button.

The tutor category and task drop-down boxes will be disabled if you choose not to ask tutors to select a task when they sign in. Otherwise, the boxes will be enabled.

SIGN OUT (TUTORS) SCREEN

Purpose: To manually sign tutors out of **AccuSQL/AccuTrack**.
Access: From **System Administration**, click ***Tutor Visits Tracking > Sign Out***.
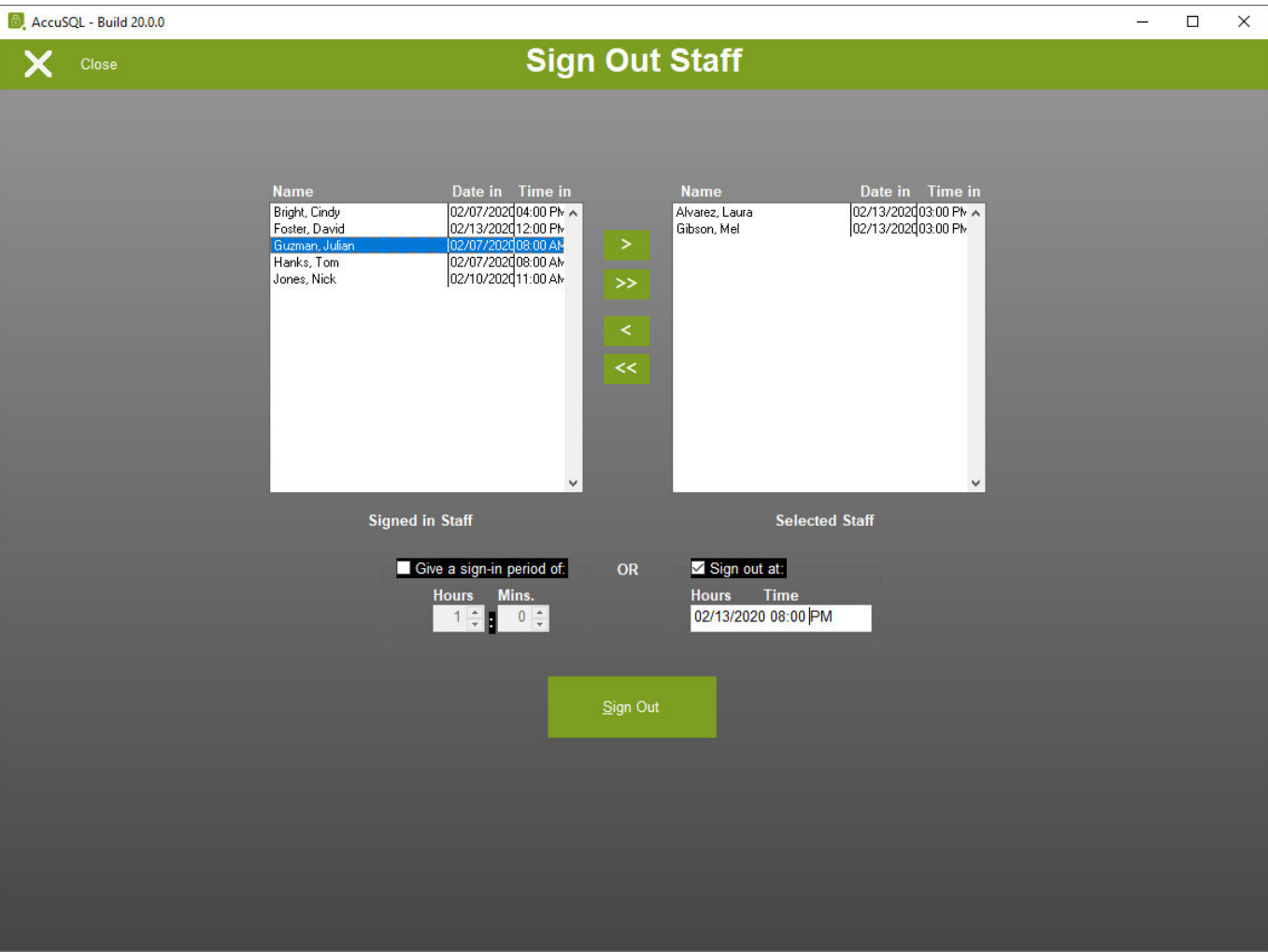
The screen has two list boxes. The list box on the left is labeled "**Signed in Tutors**" and lists the names, sign-in date, and sign-in times of all tutors who are signed in. The list box on the right is labeled "**Selected Tutors**," and lists the tutors you have selected to sign-out. This list box will be empty when you first access this screen.

Use the Selection List Boxes control to select one or more tutors. Before signing the selected tutors out, you need to assign them a sign-in period. **AccuSQL/AccuTrack** allows you to do this in one of two ways:

1. Enter the sign-in period to be given to each person. For example, you can give each person one hour of sign-in time. **AccuSQL/AccuTrack** will calculate the sign-out time automatically. To do this, first, check the "Give a sign-in period of" checkbox and enter the amount of time you want to give to each person.


2. OR enter the sign-out time for each person. **AccuSQL/AccuTrack** will calculate the appropriate sign-in period, taking into consideration the maximum sign-in period set in the Options screen. To do this, first check the "Sign out at" checkbox, and enter the desired sign-out time.
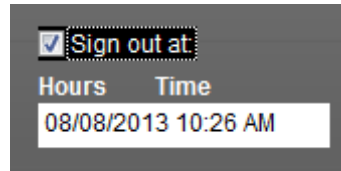
You can right-click on the Sign out at date display to use a calendar picker to change the date and time.

Click on "**Sign Out**". You will see a confirmation message:
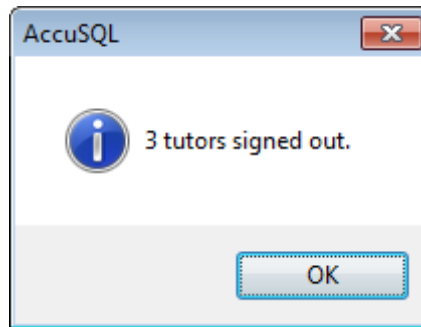
EDIT (TUTOR) SIGN-IN LOGS SCREEN

Purpose: Modify tutor sign-in records.
Access: From System Administration, click on **Tutor Visits Tracking > Edit Sign-in Logs**.

The procedure to edit tutor sign-in records is very similar to the one used when editing the Student's sign-in records.

The table in this screen displays the tutor, category, task, sign-in time, sign-out time, and sign-in period for each sign-in record.

FINDING A RECORD

You can use the filters on the right side of the screen to zoom to the record you want to change. Start by restricting the viewed records to a certain time period by entering the "From" and "To" date and time. You can also restrict the viewed records to a certain category, task, or tutor by using the drop-down boxes. Click on the "Refresh" button to apply the filter.

Use the binocular icons to search for a specific tutor, name or ID, and/or a specific category or task. After selecting the values you want, click the refresh button to update the values in the Edit Tutor Sign-in Logs display grid.

DELETING SIGN-IN RECORDS

To delete a sign-in record, first select the record by clicking on it in the grid, then click on the "Delete"

button. You will see a confirmation message. Click on "Yes" to delete the record, or "No" to cancel.

When you delete a record, it will be gone forever, so be careful using this option.

EDITING SIGN-IN RECORDS

To edit a record, select it by clicking on it in the grid, then click on the "**Edit**" button. This will bring up the Edit Record box.

The first box is labeled "In" and shows the sign-in date and time. The second box is labeled "Out" and shows the sign-out date and time. If the out box is empty then the tutor has not signed out yet. The third box is labeled "Period" and shows the sign-in period in hours and fraction of an hour.

Under these boxes you will see three drop-down boxes. The first drop-down is labeled "Category" and shows the category signed into. The second drop-down is labeled "Task" and shows the task tutor signed into. The third drop-down is labeled "Tutor" and shows the name of the tutor.

To change the sign-in date or time, simply enter the corrections in the box. The same can be done with the sign-out date and time. As usual, you can right click on the date boxes to use the calendar. Note that the sign-in period is calculated every time you change the sign-in or sign-out date and leave the time box. You can also enter the period directly and it will adjust the Out time accordingly. To change the category, activity, student, or tutor, simply select the appropriate one from the drop-down window, or use the binoculars icon to search for a record. If you want to revert to the saved record

without making changes, click on the "**Restore**" button. If you want to save your changes, click on the "**Save**" button. To close the Edit Record box, click on "**Close**".

TUTOR TASKS SCREEN

Purpose: Enter and modify tutor's tasks.
Access: From System Administration, click on **Tutor Visits Tracking> Tasks**.

If you plan on tracking tutors' work hours, you might also be interested in tracking what they do with their time by setting up a list of tasks for them to sign in to.

You will see two list boxes displaying the tutor's current categories and tasks. The list box on the left shows the categories. The list box on the right shows the activities for the selected category. For new installations, both boxes will be empty.

Students' activities are for tracking what students do during their visits and they get displayed when students sign in. Tutor's tasks are for tracking what tutor does when working and they get displayed when tutors sign in. The two are separate from each other.
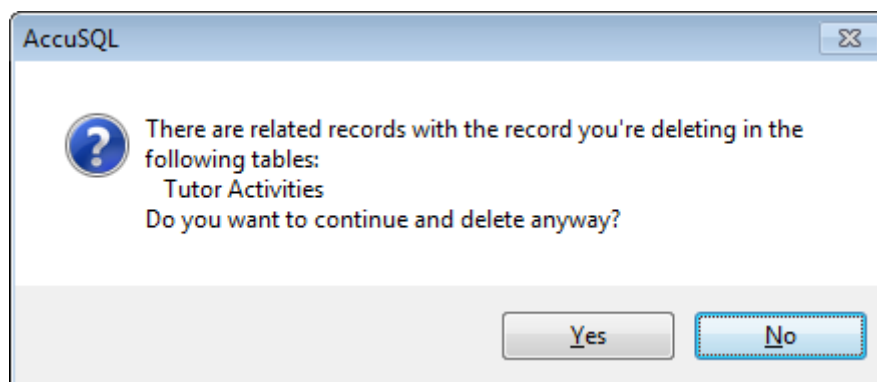
Adding a Category

To **add** a new category, click "**Add**" on the left and then type its name in the category entry box and then click on the "**Save**" button under it. The category's name will move from the text box to the **Category** list box

Editing a Category

To **edit** a category, highlight it in the **Category** list box by clicking on it, then click on the "**Edit**" button under the Category text box. You can also double click on the category name to edit it. The category will be copied to the entry box where you can make the changes. When you click the "**Edit**" button, the "**Save**" and "**Cancel**" buttons appear. If you want to keep your changes, click the "**Save**" button. If you want to keep the category as it appears in the Category list box, click on the "**Cancel**" button.

Deleting a Category

If you enter a category by mistake, and wish to remove it from the list, highlight it by clicking on it and click on the "**Delete**" button. **AccuSQL/AccuTrack** will check to make sure that the category was not used in sign-ins, and if so, it will display a message as follows:

If you answer "**Yes**", the category will be deleted.

If the category was used in the sign-ins, you should make the category inactive and not delete it if you still want to run reports on it.

Making a Category Inactive

If you need to remove a category from the sign-in screens because it is no longer needed, and you are not able to delete it because it is needed for the reports, you can make the category inactive. Inactive categories do not appear in the sign-in screens, but are still available for reports. To make a category inactive, first highlight it and click on "**Edit**", then uncheck the active check box by clicking on it, and then click on "**Save**."

Adding a Task

To **add** a task, follow these steps: 1. Select the Category under which the task will be added by clicking on the category. 2. Click Add (right-side) 3. Enter the activity's name in the Task entry box, located under the Task list box on the right. 4. Click on the "Save" button under the Task text box. The activity's name will move from the text box to the Task list box.

Editing a Task

To **edit** a task, highlight it in the **Task** list box by clicking on it, and then click on the "**Edit**" button under the Task List box. You can also double click on the activity's name to edit it. The activity will be copied to the Activity entry box where you can make the changes. If you want to keep your changes, click the "**Save**" button. If you want to keep the activity as it appears in the list box, click on the "**Cancel**" button.

Deleting a Task

If you enter a task by mistake, and wish to remove it from the list, highlight it by clicking on it and click on the "**Delete**" button under the activity list box. **AccuSQL/AccuTrack** will check to make sure that no one has signed in to this task before, and if so, you will see a confirmation message. Answer "**Yes**" to delete the activity.

If the task was signed in to, it will be needed for the reports, and you will not be allowed to delete it. In this case, you can make the task inactive. This means it will not appear in the sign-in screens anymore, but it will still exist in the database for use in reports.

Making an Task Inactive

To make an activity **inactive**, first, highlight it and click on "**Edit**", then uncheck the active checkbox by clicking on it, and then click on "**Save**."

Displaying the Tutor Tasks screen is optional. If you want to display it, make sure that the option "Display the Task screen when tutor sign-in" is checked in the **Tutor Visits Tracking > Setup > Tutor Sign-in Options** screen. If this box is not checked, **AccuSQL/AccuTrack** will not display the Tasks screen to tutors and will record their sign-in time without recording any task selection.

PAY RATES SCREEN

Purpose: Enter tutor pay rates for calculating pay.
Access: From **System Administration**, click on **Tutor Visits Tracking > Pay Rates**.

Use this screen to define your center's pay grades. For each pay grade, you can define the minimum and maximum pay. You can also define bonus pay including preparation time, no-show pay, and groups of 2, groups of 3, and groups larger than 3 pay.

The above items are optional, so if you do not pay for preparation time, for example, enter 0 in that field.

Adding a Pay Rate

To add a new pay rate, click on the "Add" button, next, enter the **Pay Type**, the no-show rate, and preparation rates (both percentages). You can also enter the pay increment for groups of 2 students, a group of 3 students, and a group of more than 3 students (in dollars and cents). These values are calculated based on tutor group appointments and will be added to the basic pay rate of the tutors. Next, enter the minimum and maximum pay rates for this group. Click on Save to add the new pay rate.

Editing a Pay Rate

The list box on the left side of the screen shows the current pay rates. To edit the information for one of these pay rates, click it and then click Edit. **AccuSQL/AccuTrack** will enable the data fields and copy the data to them. You can then make your changes. When you are done editing click on "Save" to keep the changes.

After you have the pay rates created, they are then added to the tutor records in the **Users > Tutors** screen in the **Pay Type** and **Pay Rate** field. The pay rate will populate with the minimum basic rate but can be adjusted up to the maximum basic rate you have entered for that **Pay Type**.