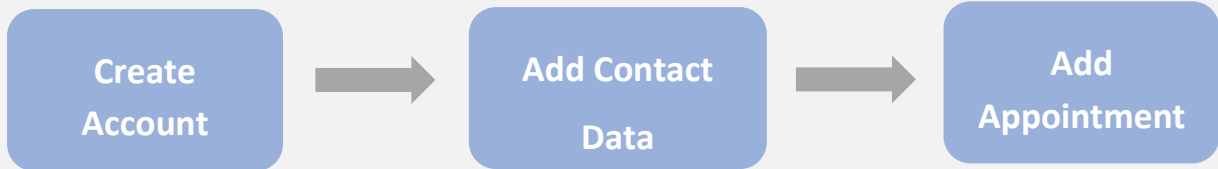


Summary

Use the Account Summary page to add new or edit existing Client intake record. Search for client in fields at top of page.



Add New Account: On Account Summary page

- Go to the Account Summary page
- Select **Look-Up** to search for client
 - Enter Clients name
 - Click **SEARCH & ADD**
- If there is an existing account, matches will be displayed on the **Search Results** tab
 - Click on existing Clients account by highlighting selected account in blue
 - Click **SELECT**
- To create an Account for a new Client
 - Click on **Create New Account** tab
 - Select Consent level
 - Enter First and Last Name
 - Enter Date of Birth and Social Security Number if available
 - DOB and SSN may be required when applying for future services
 - Enter Phone number or Email
 - Mark Checkbox if phone number is not available
 - Click **SIGN UP**
 - The Clients Account will be display on the Account Summary page

First Name	Middle Na...	Last Name	Date Of Birth	Last4 SSN	Account	Email	Phone1	Address
John		Smith	10/29/1900	7800	JSmith20...	JSmith20...		
John		Smith	1/21/1987	7809	JSmith20...	JSmith20...	4445500...	

Note: Consent level determines who may access record, a default value may be used here:



- System = All Users have access to record
- Region = Users logged in Org within this region
- Organization = Users logged in to this organization
- Group = Users logged in as this User Group
- Private = Only User

Search Result And Create Account

Search Result **Create New Account**

Consent

group



group

system

Region

Last Name *

Add Contact Information:

- On the Account Summary page
 - Select Clients name on the **Profile** section
- In the **Edit Account** popup window:
 - Edit Account
 - Add Contact information
 - Enter Last Known Permanent Address
 - Address may auto fill Google Maps address
 - If mailing address is different than residential address, check box and enter address
 - To view Address History
 - Click **HISTORY** button  next to Address
 - Click **SAVE**
- To **Deactivate** account
 - Click on **DEACTIVATE** button  on the **Profile** section

Look-Up

First Name Last Name

JOHN SMITH

2103013

Start a post

Edit Account

EDIT ACCOUNT

Consent

Group

First Name * Middle Name Last Name *

John

Date Of Birth SSN Last 4 SSN File Number

Account ID Language *

JSmith202470@TMP.com English


CONTACT INFORMATION

Primary Phone Phone Type Leave MSG

Alternate Phone Phone Type Leave MSG

Email Contact Preference

JSmith202470@TMP.com

LAST KNOWN PERMANENT ADDRESS 

Address County Unit Type Unit Number

Enter your address

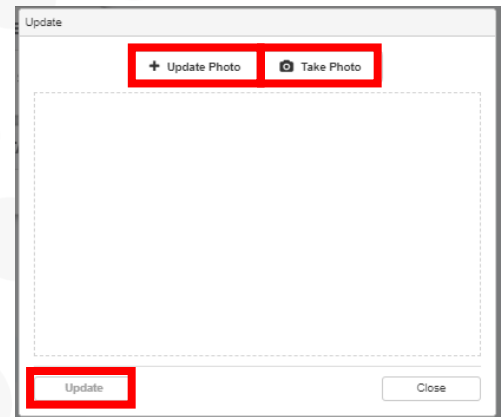
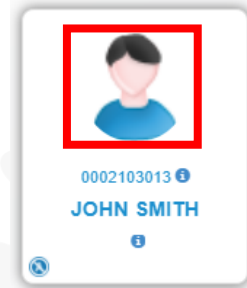
Check if the mailing address is different from the address above

Save Close



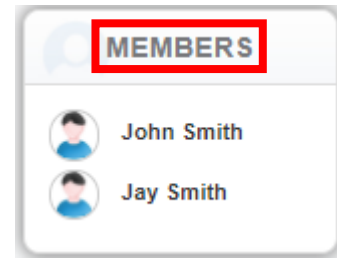
(Optional) Upload or take Client Photo:

- On the Account Summary page, select **Profile** picture
- Photos may be added on most client pages and client needs to be active
- In the Update Photo popup window:
 - Click **UPDATE PHOTO** to upload a photo from your local computer or mobile device
 - A folder will be displayed allowing you to navigate to the desired photo
 - Or click **TAKE PHOTO** to take a photo with your mobile device or webcam
 - Click **UPDATE**
- After saving, the photo will be displayed in the top right section of all client pages





Add Member Information:

- On the Account Summary page, select **MEMBERS**
 - Click **ADD NEW MEMBER**
 - In the **Add Member** popup window:
 - Enter required fields
 - First Name
 - Last Name
 - Date of Birth
 - Gender
 - Education
 - Martial Status
 - Ethnicity
 - Relationship to Head of Household
 - Race
 - Click **SAVE**





- Member will display under Member section
- Select Member Name to view/edit Household Member
- Click on **Delete** button  to delete member
- To change Account Owner
 - Next to selected Household member name
 - Click **SET OWNER** button 


Members

[Add New Member](#)



General Household Info

Household Info
Household Type: Household Size: Housing Status:

Household Member(s)

John Smith 

ID: 2103013 Identifier: 0002103013 SSN:
Relationship to Head of Household: [Self](#)
Marital Status: Veteran Status:
Residency Status: Medical Insurance: Disabling Condition:
Education Level: Primary Language: [English](#) Interpreter Needed: [No](#)
Ethnicity: Race:
Modified by: [AS1UserV8](#)

Jay Smith 12/4/2002 Male  

ID: 2103015 Identifier: 2103015 SSN:
Relationship to Head of Household: [Head of household's child](#)
Marital Status: [Single](#) Veteran Status:
Residency Status: Medical Insurance: Disabling Condition:
Education Level: [High School Diploma](#) Primary Language: Interpreter Needed:
Ethnicity: [Non-Hispanic/Non-Latino](#) Race: [American Indian/Alaska Native](#) [Black/African-American](#)
Modified by: [AS1UserV8](#)

[Close](#)

(Optional) Add Emergency Contacts:


- On the Account Summary page, select **CONTACTS**
- In Contact popup window:
 - Click ADD next to Category Name needed
 - Enter or select Contact Information
 - Basic Information
 - Address
 - Check box if 16 Years or Older
 - Check box if Active
 - Click **SAVE**
- Contact will be displayed on page, grouped by Category
- Click on Contact Name to view/edit contact information


CONTACTS

 **Emergency**


Jim Smith []
(555)555-2121


Contact


 **Emergency** [+ ADD](#)


Jim Smith 

Relationship to Head of Household: 16 Yrs or Older: [no](#) Active: [yes](#)
Email: Primary Phone: [\(555\)555-2121](#) Phone Type:
Address: Unit: County:

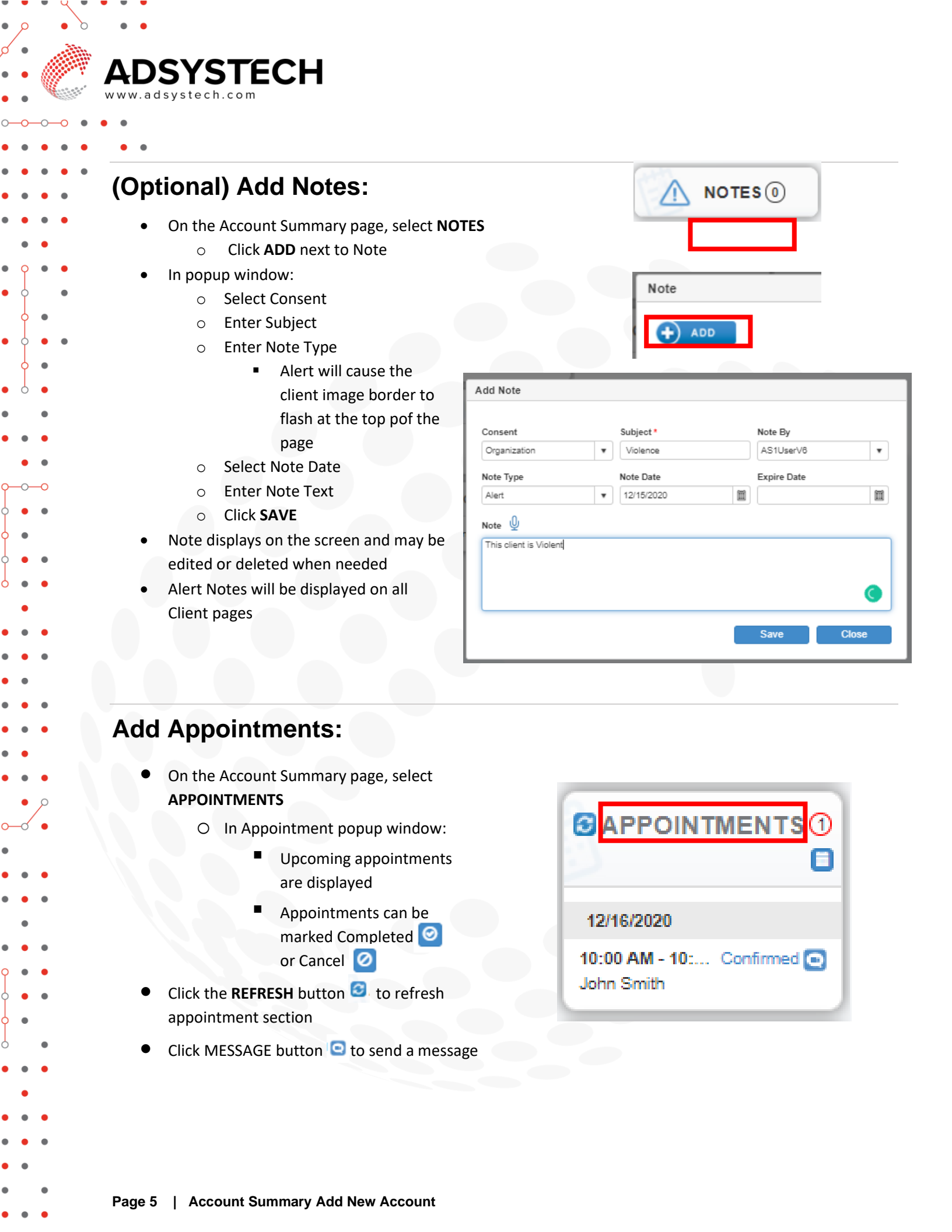
 **Medical** [+ ADD](#)

 **School** [+ ADD](#)

 **Company** [+ ADD](#)

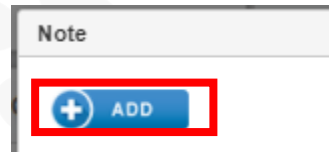
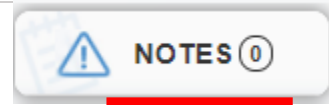
 **Other** [+ ADD](#)

[Close](#)



(Optional) Add Notes:

- On the Account Summary page, select **NOTES**
 - Click **ADD** next to Note
- In popup window:
 - Select Consent
 - Enter Subject
 - Enter Note Type
 - Alert will cause the client image border to flash at the top of the page
 - Select Note Date
 - Enter Note Text
 - Click **SAVE**
- Note displays on the screen and may be edited or deleted when needed
- Alert Notes will be displayed on all Client pages



Add Note

Consent Organization	Subject * Violence	Note By AS1UserV8
Note Type Alert	Note Date 12/16/2020	Expire Date

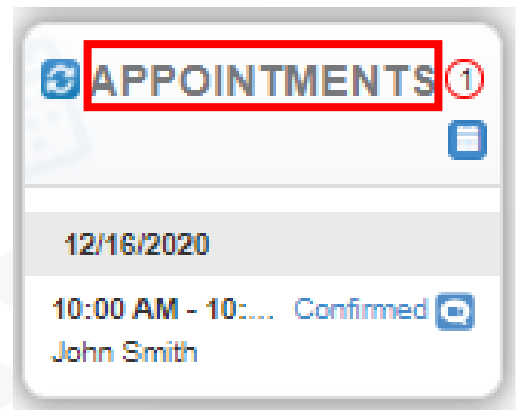
Note


This client is Violent

Save
Close

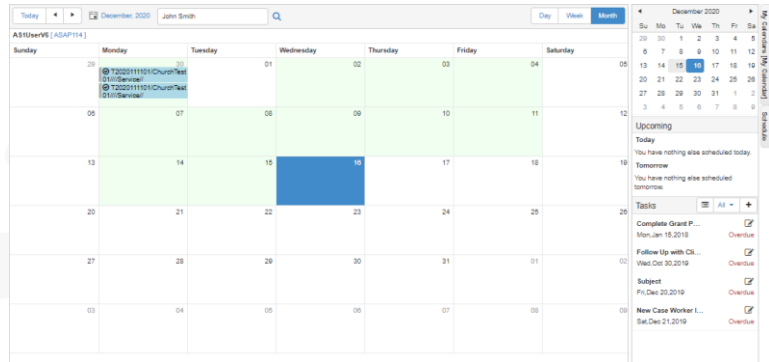
Add Appointments:

- On the Account Summary page, select **APPOINTMENTS**
 - In Appointment popup window:
 - Upcoming appointments are displayed
 - Appointments can be marked **Completed** or **Cancel**
- Click the **REFRESH** button to refresh appointment section
- Click **MESSAGE** button to send a message



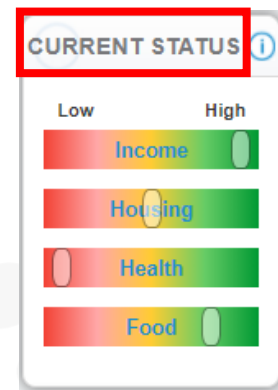
- Click on the Calendar button  to add or edit appointments

- Calendar will open in a new browser tab
- Right click any date on calendar to as a new appointment
- In the New Appointment popup window:
 - Enter appointment information
 - Select Start Date and Time
 - Select Duration
 - Select Alert Type
 - Select Recipient for Alert
 - Click **SAVE**
- Appointment will display on Calendar



View/Edit Current Status:

- On the Account Summary page, select **CURRENT STATUS**
- Results of Assessment(s) will be displayed if assessment has been created
- In Current Status popup window
 - Each Column notes the date of the Assessment or Outcome changes





- Results for each Domain reflect the Client Assessment answer and are color coded according to the Scale Legend
- Click **EDIT** to update assessment questions
 - Update answers
 - Click **SAVE**

Domain	Description	Status
Income	What is your family's current household incom...	Able to pay all bills and save
Housing	How would you describe your family's current ...	Living with friends/relatives
Employment	How would you describe your family's current ...	Full Time Employment above minimum wage
Health	How would you describe your family's current ...	A family member's health problems prohibit ...
Transportation	How would you describe your family's current ...	Public or private transportation available mo...
Emergency	Are mental health and/or substance abuse iss...	No basic needs met (Emergent situation)
Nutrition	How would you describe your family's regular f...	Able to afford some food without food progr...
Education	How would you describe your academic skill s...	High School/HS Set

View Applications:

- On the Account Summary page, select **APPLICATIONS**
 - Active applications will be displayed on the application section
- In **Service History** popup window:
 - Enter fields to search for Clients Applications

APPLICATIONS

Accepted In Review Denied

No applications

Name	Service Source	Service Type	Service Date	Service Name	Amount	Status
John Smith	RSM	Appointment	12/16/2020 -	Appointment	45 Min.	Conf...