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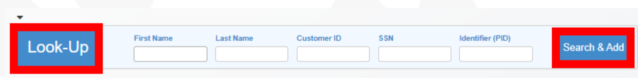
Account Summary Add New Account

Summary

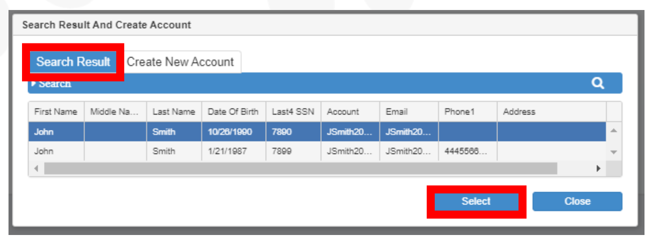
Use the Account Summary page to add new or edit existing Client intake record. Search for client in fields at top of page.

Create Account → **Add Contact Data** → **Add Appointment**

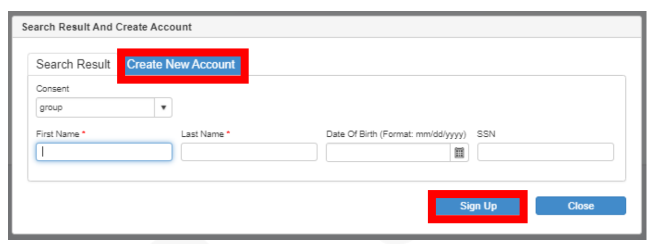
Add New Account: On Account Summary page

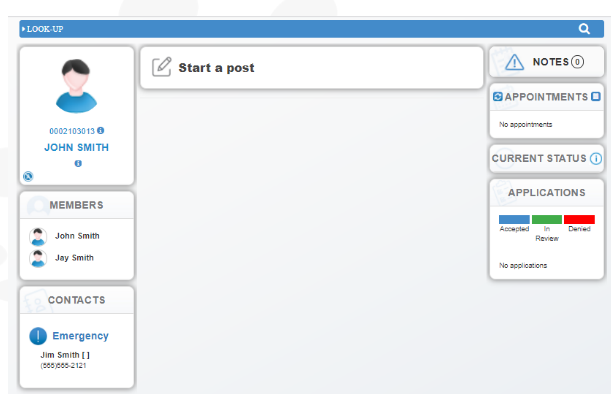


- Go to the Account Summary page
- Select **Look-Up** to search for client
  - Enter Clients name
  - Click **SEARCH & ADD**
- If there is an existing account, matches will be displayed on the **Search Results** tab
  - Click on existing Clients account by highlighting selected account in blue
  - Click **SELECT**



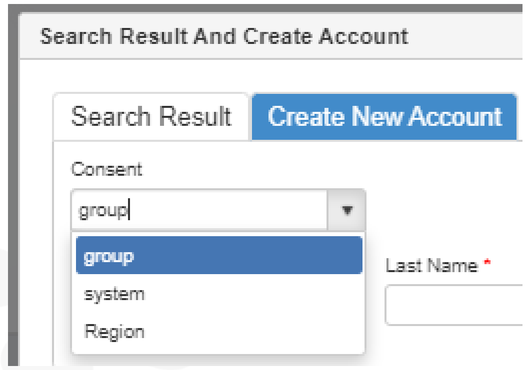
- To create an Account for a new Client
  - Click on **Create New Account** tab
  - Select Consent level
  - Enter First and Last Name
  - Enter Date of Birth and Social Security Number if available
    - DOB and SSN may be required when applying for future services
  - Enter Phone number or Email
    - Mark Checkbox if phone number is not available
  - Click **SIGN UP**
    - The Clients Account will be display on the Account Summary page





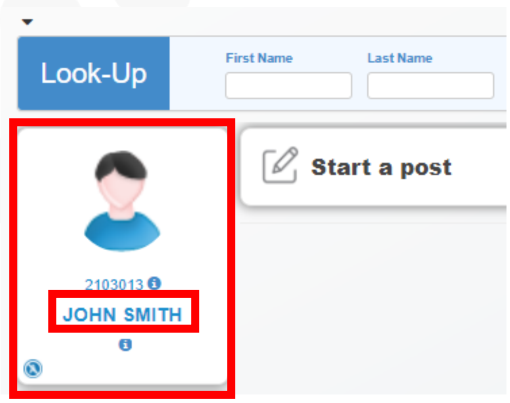
Note: Consent level determines who may access record, a default value may be used here:

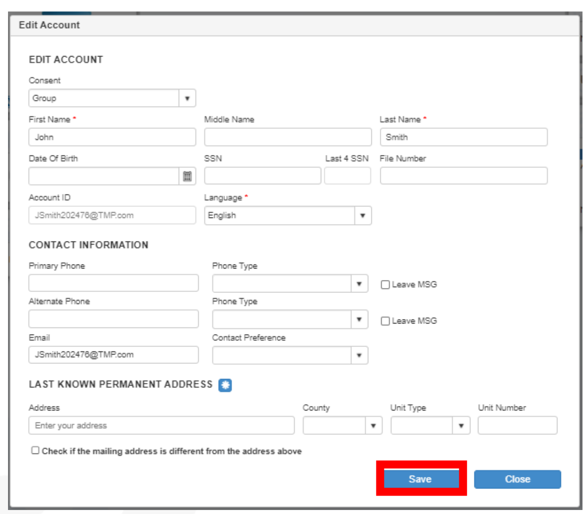
- System = All Users have access to record
- Region = Users logged in Org within this region
- Organization = Users logged in to this organization
- Group = Users logged in as this User Group
- Private = Only User



Add Contact Information:

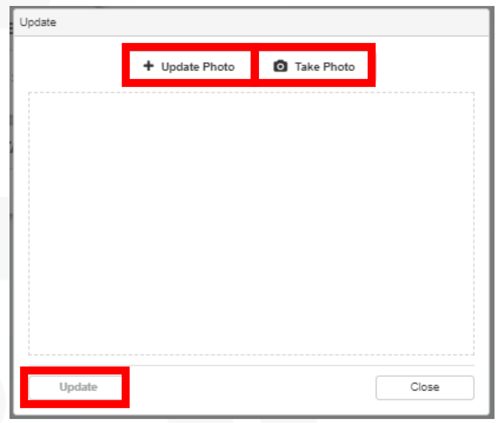
- On the Account Summary page
  - Select Clients name on the **Profile** section
- In the **Edit Account** popup window:
  - Edit Account
  - Add Contact information
  - Enter Last Known Permanent Address
    - Address may auto fill Google Maps address
    - If mailing address is different than residential 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





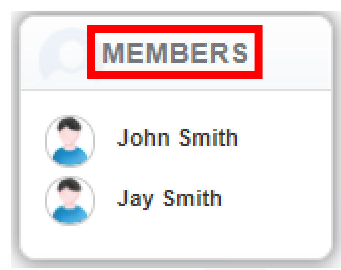
(Optional) Upload or take Client Photo:

- 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

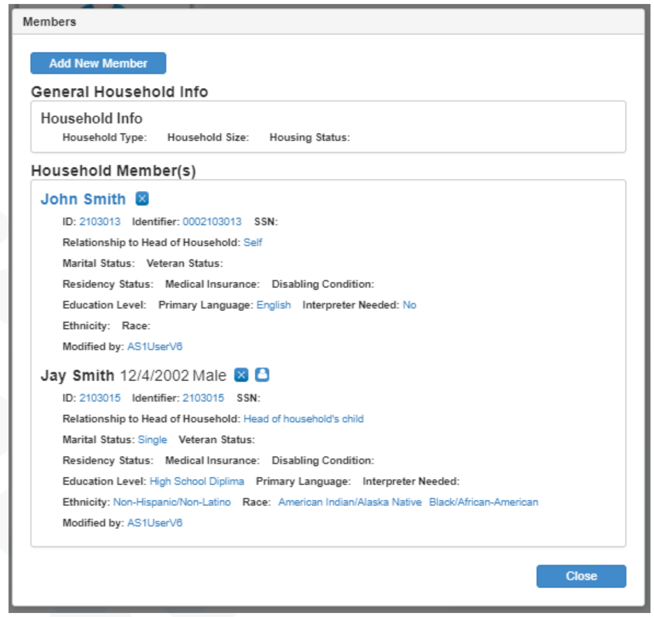


Add Member Information:

- 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
      - Ethicnity
      - Relationship to Head of Household
      - Race
    - Click **SAVE**

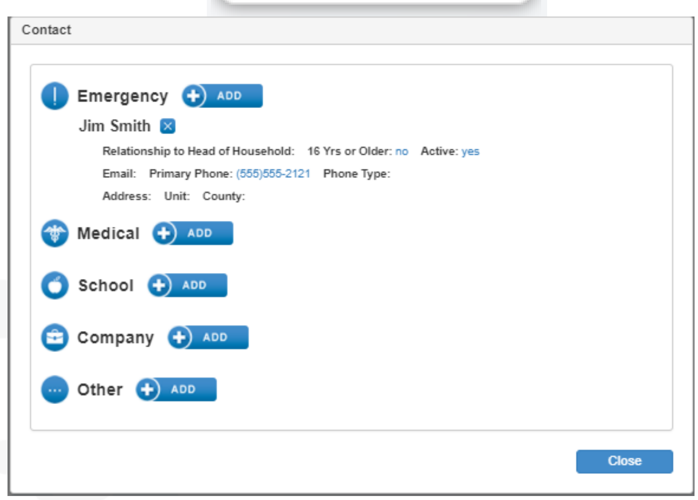


- Member will display under Member section
  - Select Member Name to view/edit Household Member
  - Click on **Delete** button to delete member
  - To change Account Owner
    - Next to selected Household member name
      - Click **SET OWNER** button

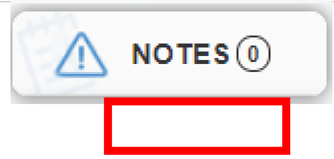


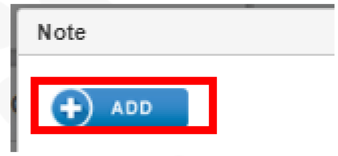
(Optional) Add Emergency Contacts:

- 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

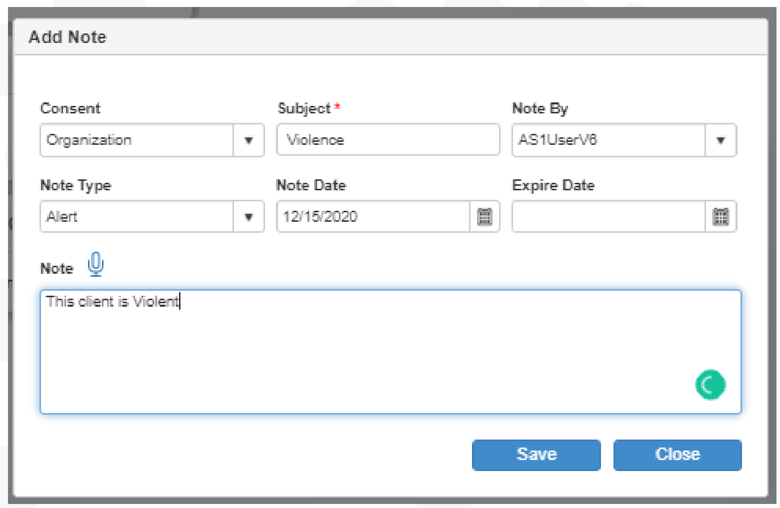


(Optional) Add Notes:



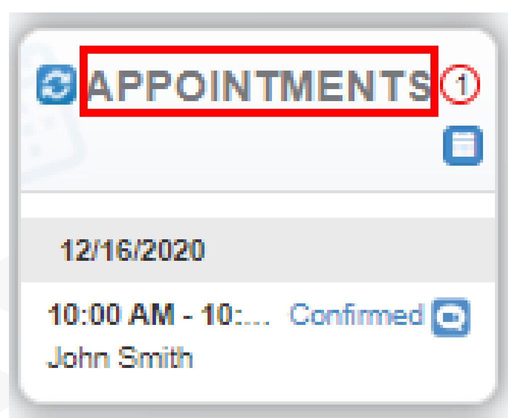


- On the Account Summary page, select **NOTES**
  - Click **ADD** next to Note
- In popup window:
  - Select Consent
  - Enter Subject
  - Enter Note Type
    - Alert will cause the client image border to flash at the top pof the page
  - Select Note Date
  - Enter Note Text
  - Click **SAVE**
- Note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

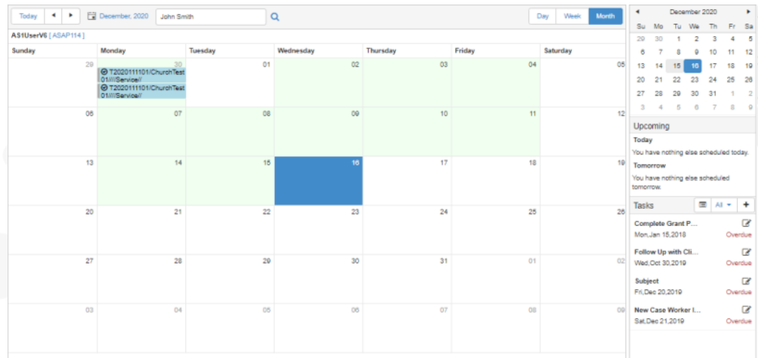


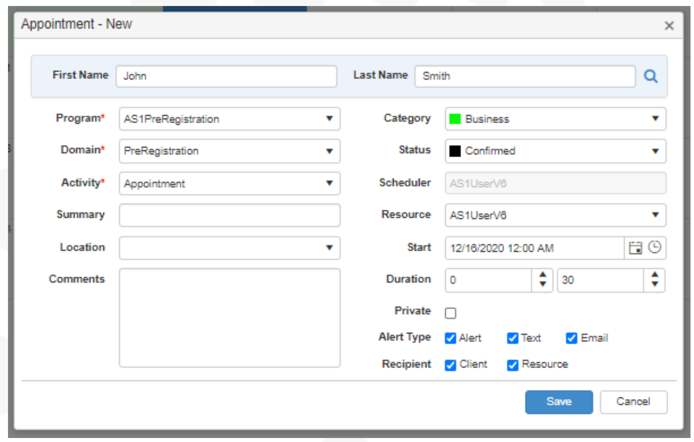
Add Appointments:

- 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



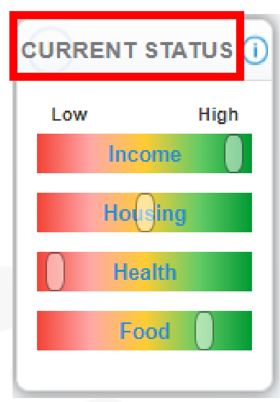
- Click on the Calendar button to add or edit appointments
  - Calendar will open in a new browser tab
  - Right click any date on calendar to as a new appointment
  - In the New Appointment popup window:
    - Enter appointment information
    - Select Start Date and Time
    - Select Duration
    -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



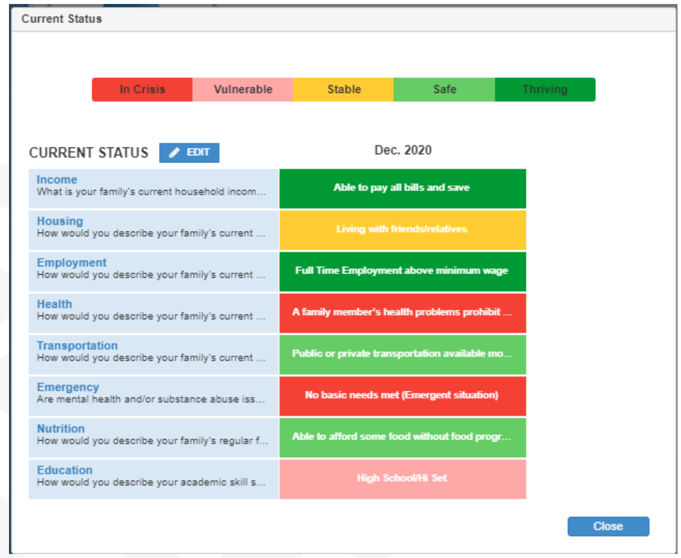


View/Edit Current Status:

- 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



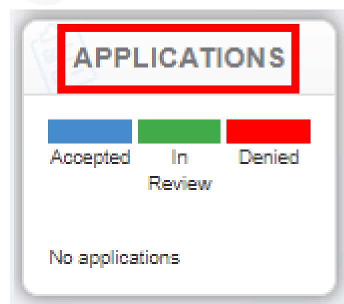
- Results for each Domain reflect the Client Assessment answer and are color coded according to the Scale Legend



- Click **EDIT** to update assessment questions
  - Update answers
  - Click **SAVE**

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