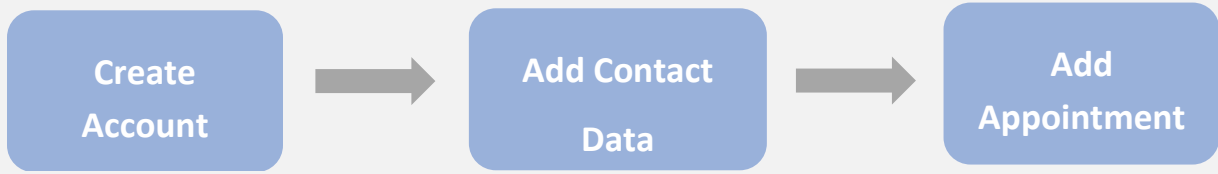




Summary

Use the Account Summary page to add new or edit existing Client intake record. Search for client in fields at top of page. Account Summary is an overview of the Clients account and provides posting as one form of communication.



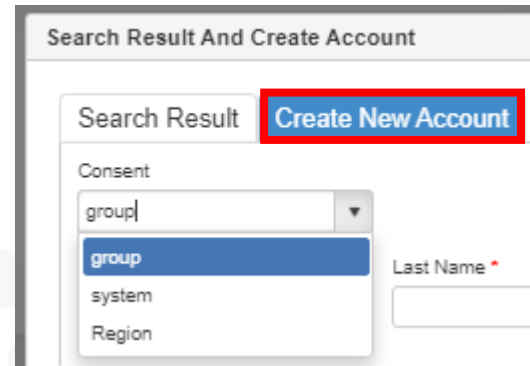
Add New Account: On Account Summary page

- 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:

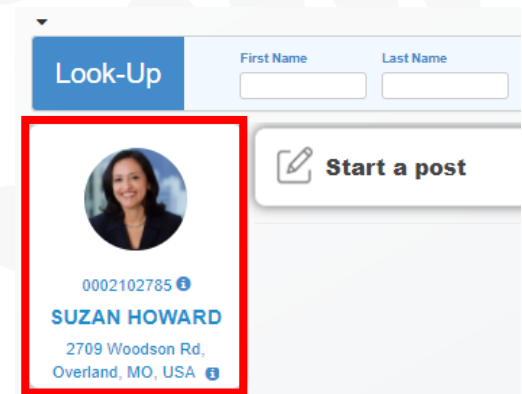
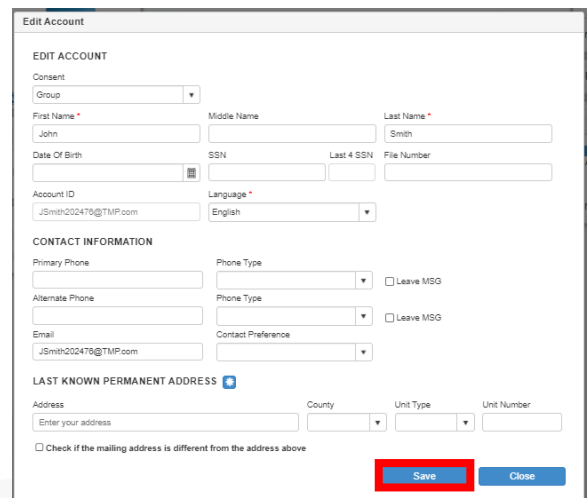
First Name	Middle Na...	Last Name	Date Of Birth	Last4 SSN	Account	Email	Phone1	Address
John		Smith	10/29/1990	7800	JSmith20...	JSmith20...		
John		Smith	1/21/1987	7809	JSmith20...	JSmith20...	4445556...	

- 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:

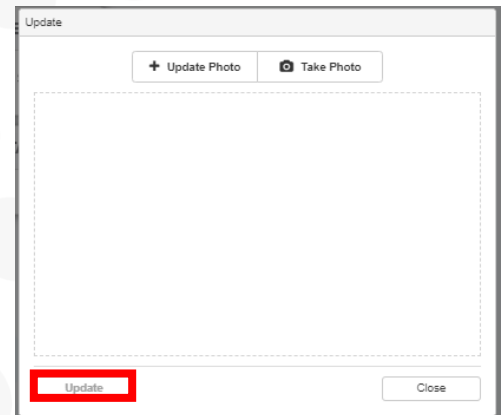
- On the Account Summary page
 - Select Clients Name, Address or Customer ID number on the **Profile** section
- In the **Edit Account** popup window:
 - Edit Account
 - Add Contact information
 - Enter Last Known Permanent Address
 - Address may auto fill Google Maps address
 - If mailing address is 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



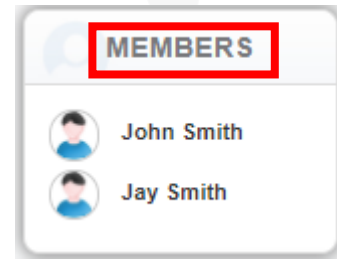
(Optional) Upload or take Client Photo:

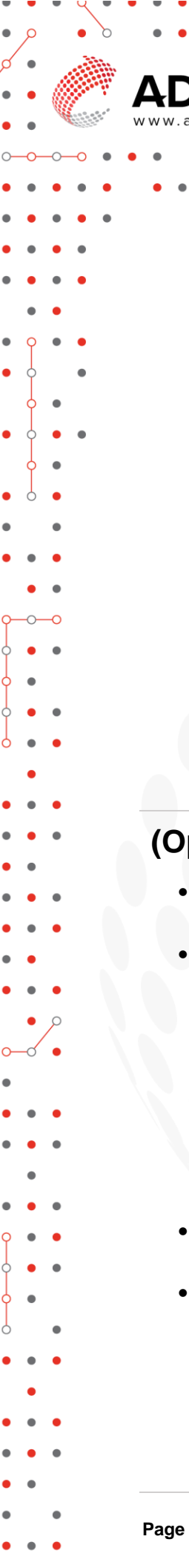
- On the Account Summary page, select **Profile** picture
- Photos may be added on most client pages and client needs to be active
- In the **Update Photo** popup window:
- Click **UPDATE PHOTO** to upload a photo from your local computer or mobile device
 - A folder will be displayed allowing you to 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
- Ethnicity
- Relationship to Head of Household
- Race
- Click **SAVE**
 - Member will display as 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: ASIUserV6

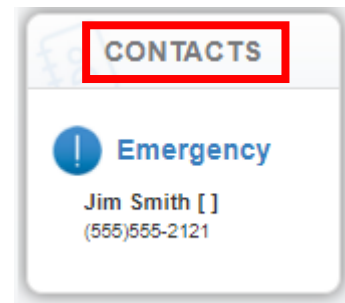
Jay Smith 12/4/2002 Male  

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: ASIUserV6



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







Contact

 **Emergency**  **ADD**

 **Medical**  **ADD**

 **School**  **ADD**

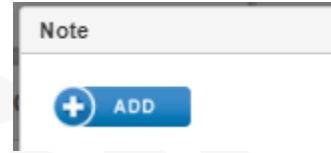
 **Company**  **ADD**

 **Other**  **ADD**





Close

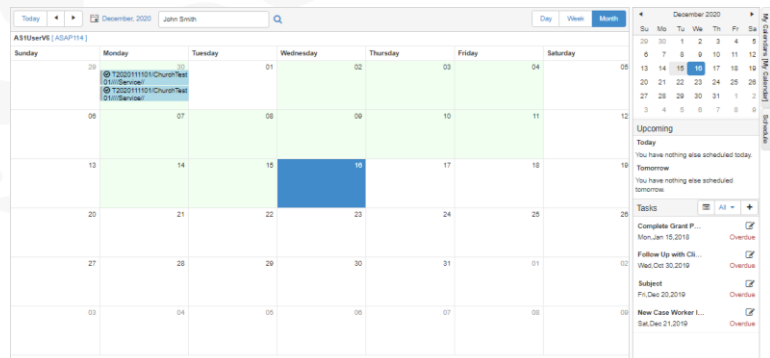
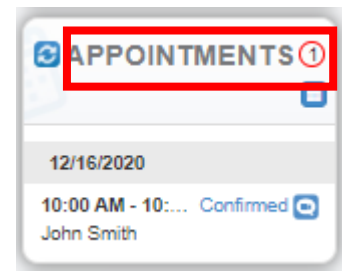
(Optional) Add Notes:

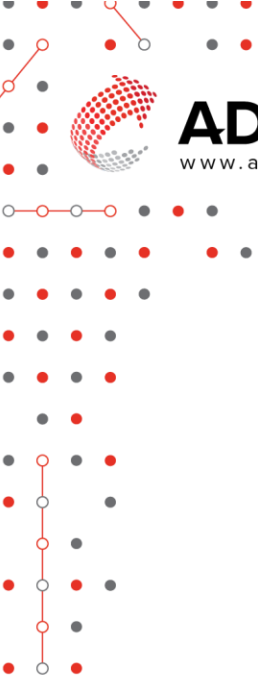
- On the Account Summary page, select **NOTES**
 - Click **ADD** next to Note
- In **Note** popup window:
 - Select Consent
 - Enter Subject
 - Enter Note Type
 - Alert will cause the client image border to flash at the top of the page
 - Select Note Date
 - Enter Note Text
 - Click **SAVE**
- Note displays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



Add 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 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

Appointment - New

First Name: John Last Name: Smith

Program*: AS1PreRegistration Category: Business

Domain*: PreRegistration Status: Confirmed

Activity*: Appointment Scheduler: AS1UserV6

Summary: Resource: AS1UserV6

Location: Start: 12/16/2020 12:00 AM

Comments: Duration: 0 to 30

Private:

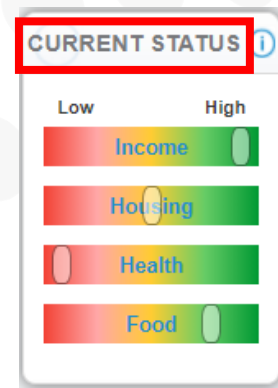
Alert Type: Alert Text Email

Recipient: Client Resource

Save Cancel

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**



Current Status

In Crisis Vulnerable Stable Safe Thriving

CURRENT STATUS **EDIT** Dec. 2020

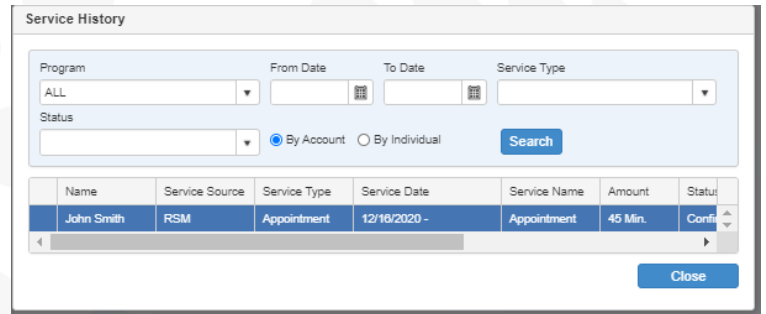
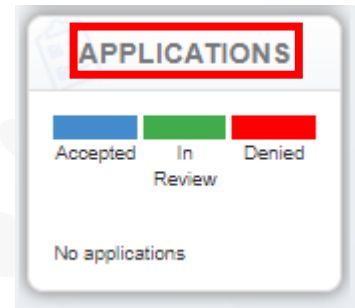
Income What is your family's current household incom...	Able to pay all bills and save
Housing How would you describe your family's current ...	Living with friends/relatives
Employment How would you describe your family's current ...	Full Time Employment above minimum wage
Health How would you describe 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/16 Set

Close



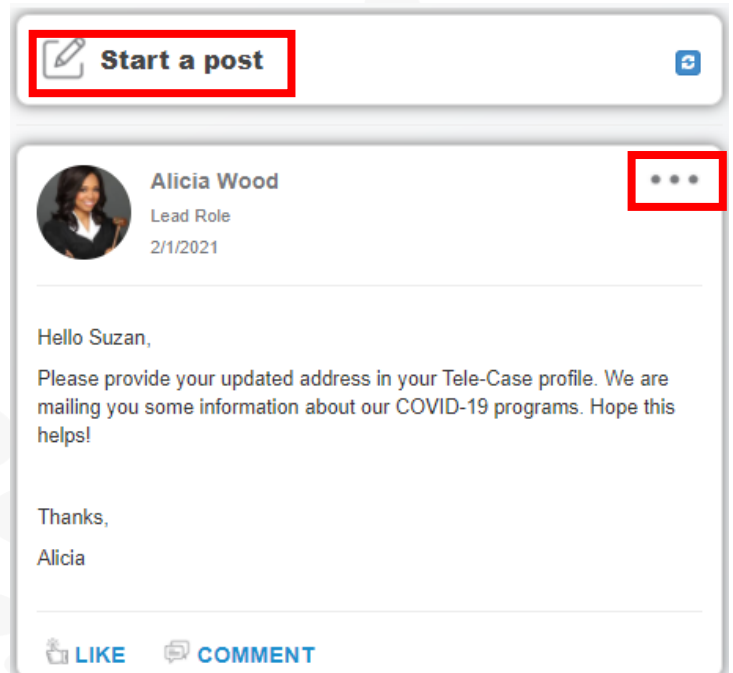
View Applications:

- 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



Start a Post:

- On the Account Summary page, select **START A POST**
- In **Post On Your Wall** popup window
 - Type in box what to post on the Client's account wall
 - Fonts, Alignments, List, Links, Pictures and Videos can all be added to the Post
 - Select Client Case and Post Type
 - Select consent level of Post
 - Group
 - Individual
- Click **SAVE**



Note: Post and Comments can be printed and removed by clicking on the 3 dots at top right of post for more options.