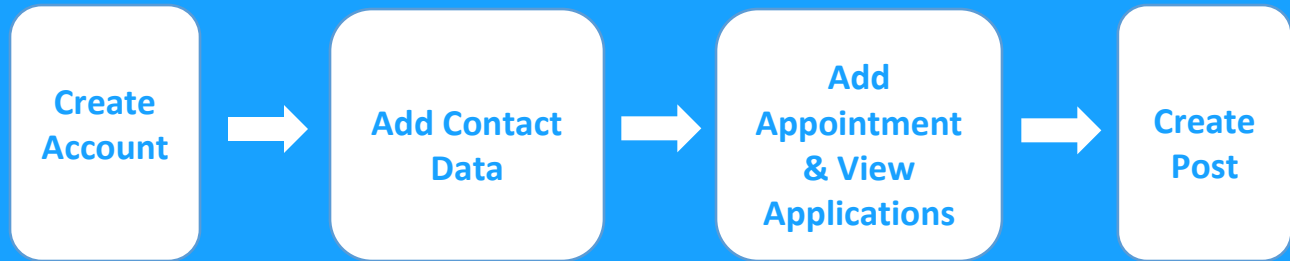


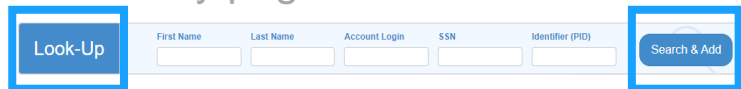
Summary

Use the Account Summary page, within Individual Services 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**



Search Result And Create Account

Search Result Create New Account

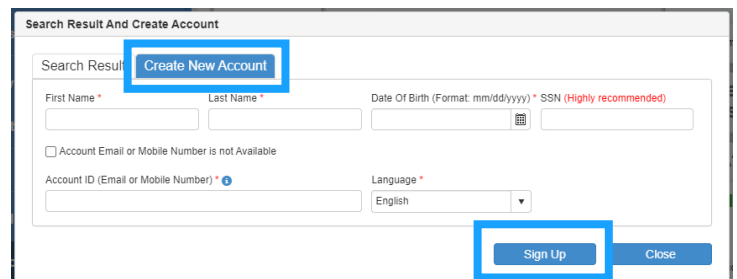
Search

Account (HOH)	First Name	Middle Na...	Last Name	Date Of Birth	Last4 SSN	Account	Email	Phone1	Addr
Suzan Howard 1f...	Suzan		Howard	1/1/1984	1242	SHoward...	SHoward...	(325)323-...	2705
Suzan Howard 1f...	Martha		Howard	2/4/2005	2321	SHoward...	SHoward...	(325)323-...	2705
Suzan Howard 1f...	Arnold		Howard	1/1/1984	4214	SHoward...	SHoward...	(325)323-...	2705
Suzan Howard	Suzan		Howard	null		Showrad...	Showrad...		

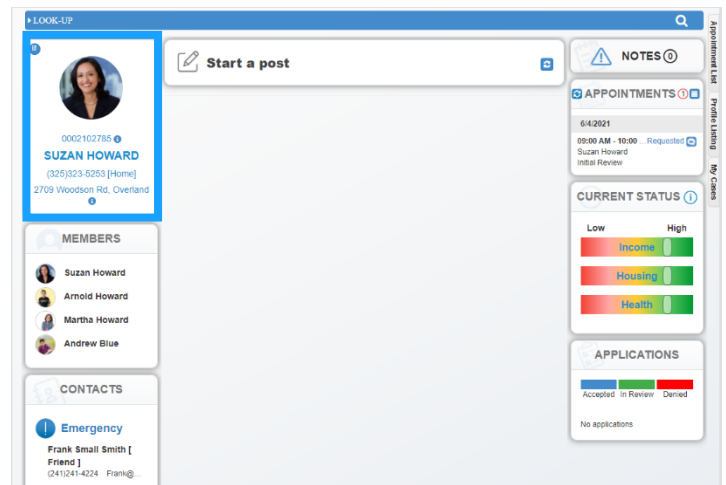
Select Close

Note: Use the APPOINTMENT LIST, PROFILE LISTING, and MY CASES Pullovers to also search for existing clients.



- 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

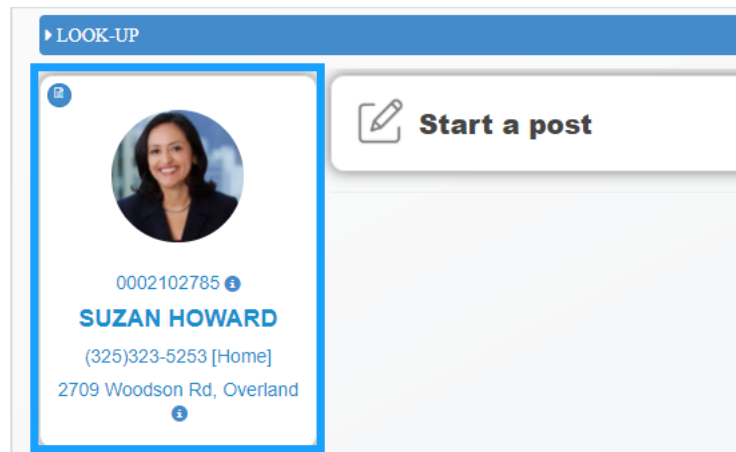


- DOB and SSN may be required when applying for future services
 - Enter Phone number or Email
 - Mark Checkbox if phone number or Email is not available
 - Click **SIGN UP**
 - The Clients Account will be display on the Account Summary page



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




Edit Account

EDIT ACCOUNT

First Name *	Middle Name	Last Name *
<input type="text" value="Suzan"/>	<input type="text"/>	<input type="text" value="Howard"/>
Date Of Birth *	Primary Language *	File Number
<input type="text" value="1/1/1984"/>	<input type="text" value="English"/>	<input type="text"/>
SSN (Highly recommended)	Account ID	Identifier
<input type="text" value="421-14-1242"/>	<input type="text" value="SHoward202351@TMP.com"/>	<input type="text" value="0002102785"/>

CONTACT INFORMATION


Primary Phone	Phone Type	<input type="checkbox"/> Leave MSG
<input type="text" value="(325)323-5253"/>	<input type="text" value="Home"/>	
Alternate Phone	Phone Type	<input type="checkbox"/> Leave MSG
<input type="text" value="(235)523-2155"/>	<input type="text" value="Work"/>	
Email	Contact Preference	
<input type="text" value="SHoward202351@TMP.com"/>	<input type="text" value="Home"/>	

LAST KNOWN PERMANENT ADDRESS 

Address	County *	Unit Type	Unit Number
<input type="text" value="2709 Woodson Rd, Overland, MO, USA"/>	<input type="text" value="Saint Louis"/>	<input type="text"/>	<input type="text"/>

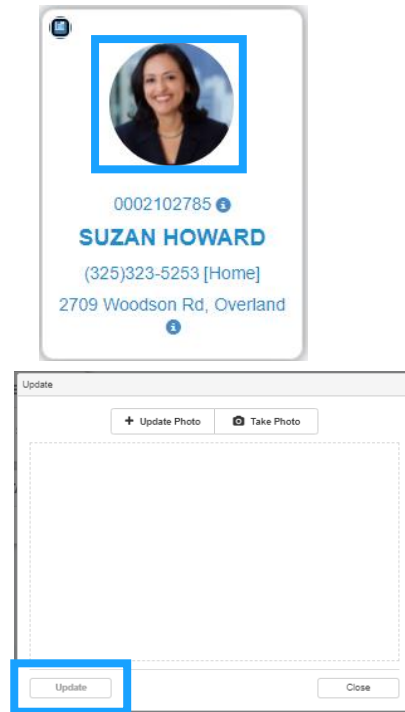
Check if the mailing address is different from the address above

Housing Status


Note: Click on **Document Inventory** button  on the **Profile** section to download and review documents.

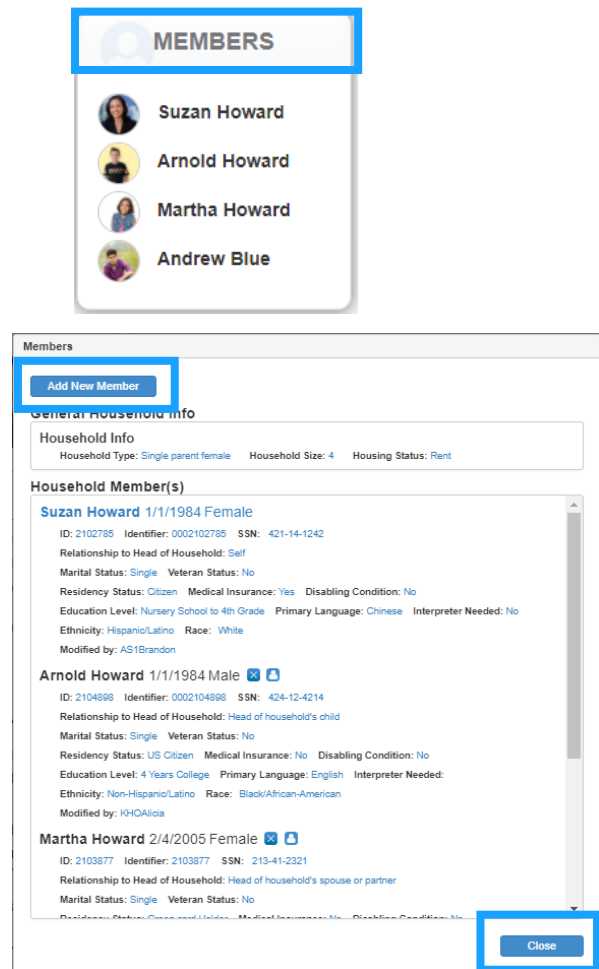
(Optional) Upload or take Client Photo:


- 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:

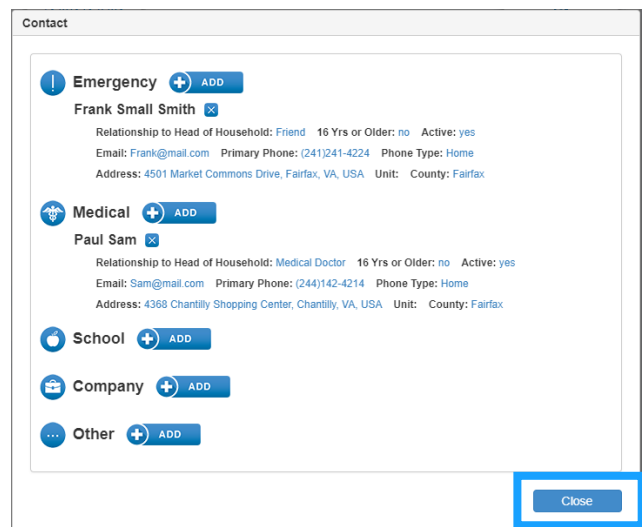
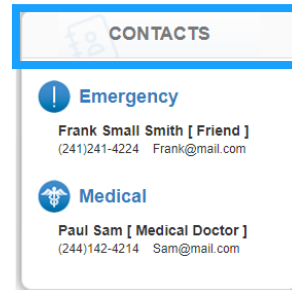
- On the Account Summary page, select **MEMBERS**
 - Click **ADD NEW MEMBER**
 - In the **Add Member** popup window:
 - Enter required fields
 - First Name
 - Last Name
 - Date of Birth
 - Gender
 - Education
 - Martial Status
 - Ethnicity
 - Relationship to Head of Household
 - Race
 - Click **SAVE**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

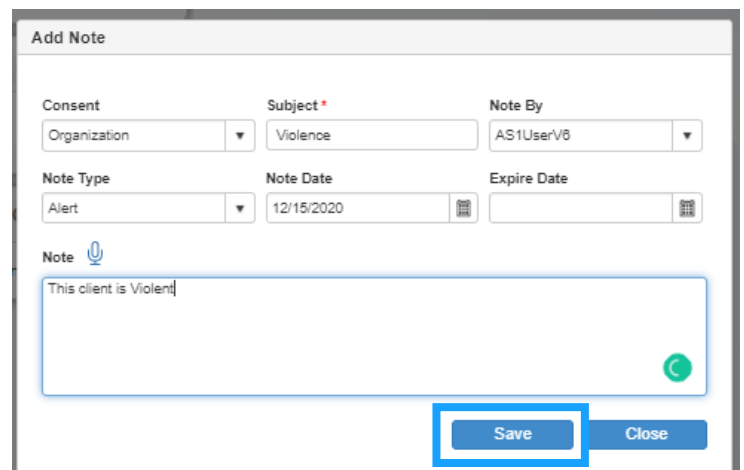
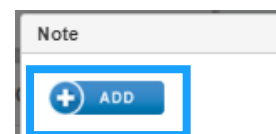
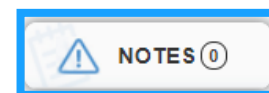
(Optional) Add Emergency Contacts:

- 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
- Click **CLOSE** when done with Contact popup window







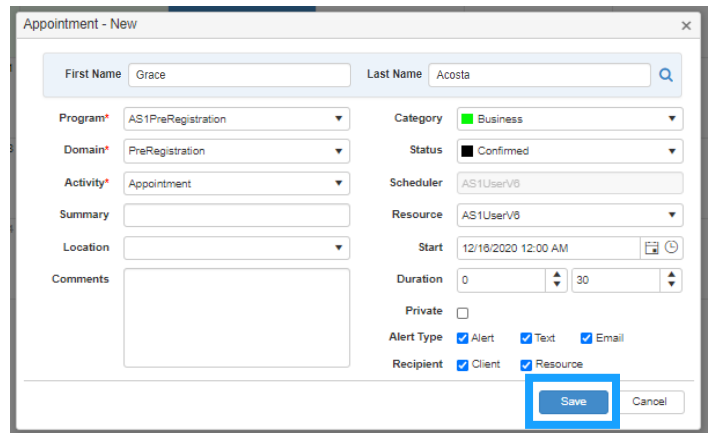
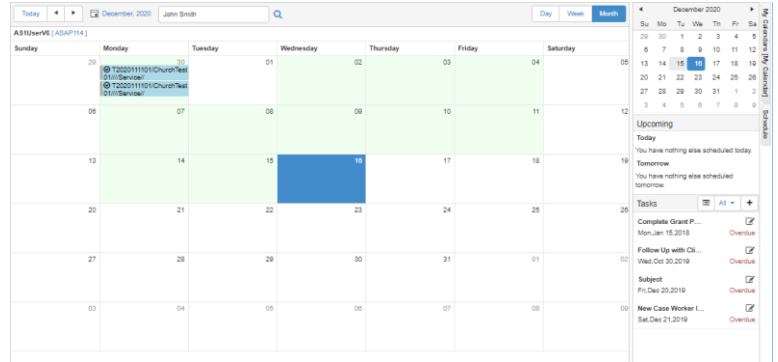
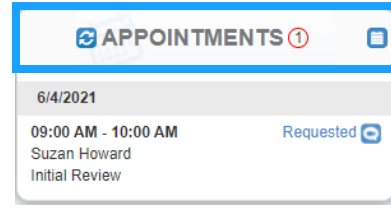
(Optional) Add Notes:

- 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



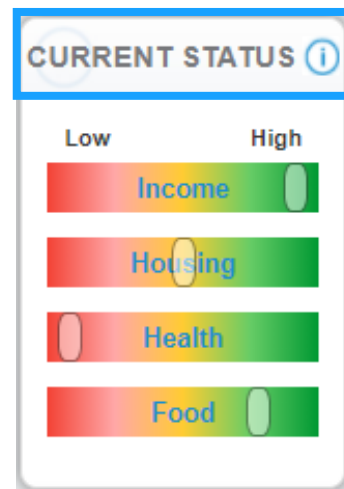
Add Appointments:

- 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

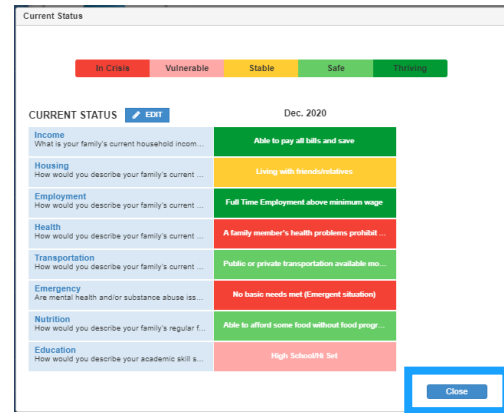


View/Edit Current Status:

- 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



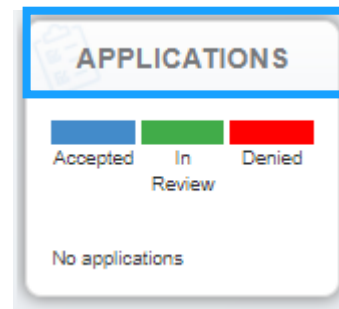
- Results for each Domain reflect the Client Assessment answer and are color coded according to the Scale Legend
- Click **EDIT** to update assessment questions
 - Update answers
 - Click **SAVE**
- Click **CLOSE** when done with the **Current Status** popup window




Domain	Question	Status
Income	What is your family's current household income...	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

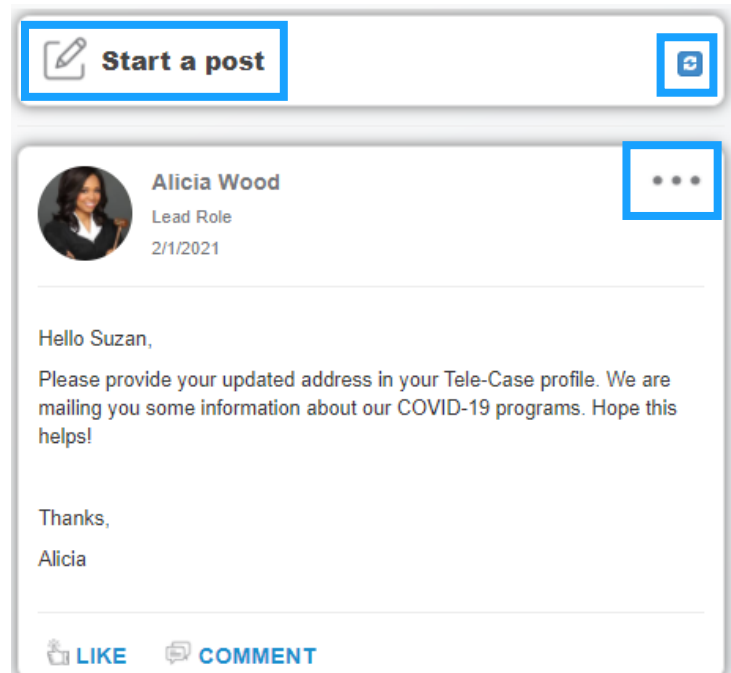
View Applications:

- 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
- Click **CLOSE** when done with the **Service History** popup window



Start a Post:

- On the Account Summary page, select **START A POST**
 - Click the Refresh button  to refresh the page
- 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.