Account Summary
Add New Account

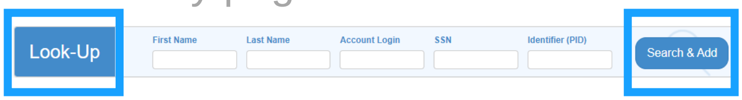
Summary

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.

Create Account → **Add Contact Data** → **Add Appointment & View Applications** → **Create Post**

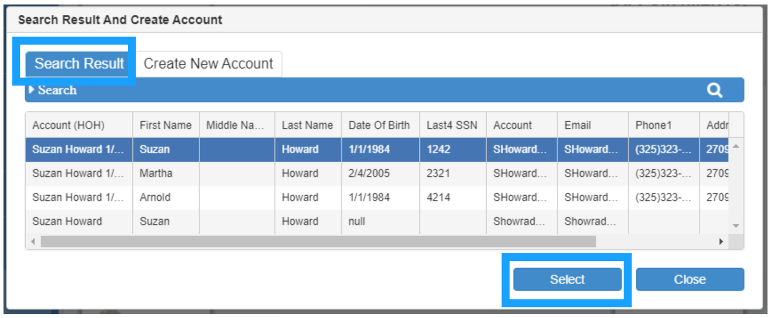
Add New Account: On Account Summary page

- Go to the **Account Summary** page



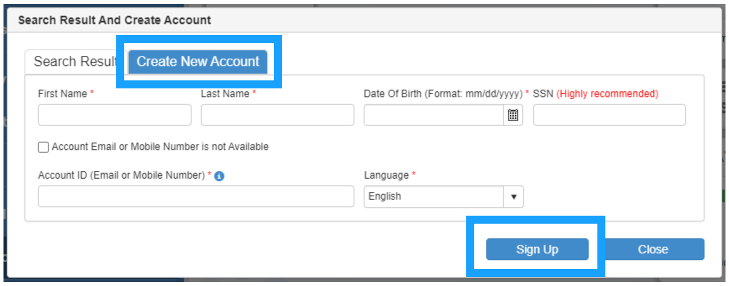
- Select **Look-Up** to search for client
    - Enter Clients name
    - Click **SEARCH & ADD**

- 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**

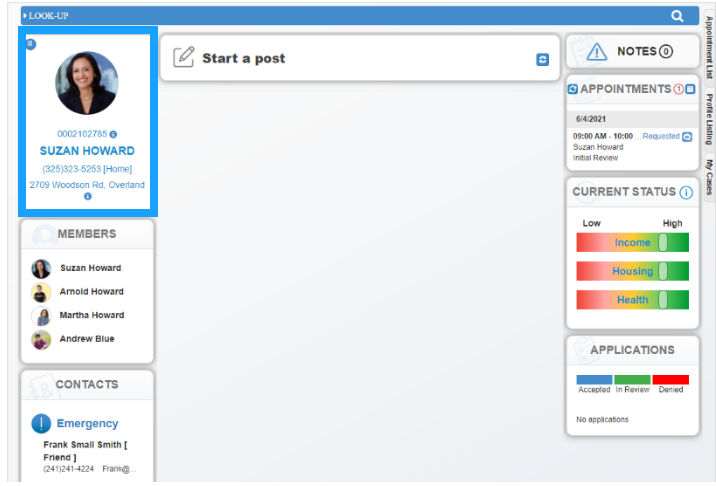


Note: Use the APPOINTMENT LIST, PROFILE LISTING, and MY CASES Pullovers to also search for existing clients.

- 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

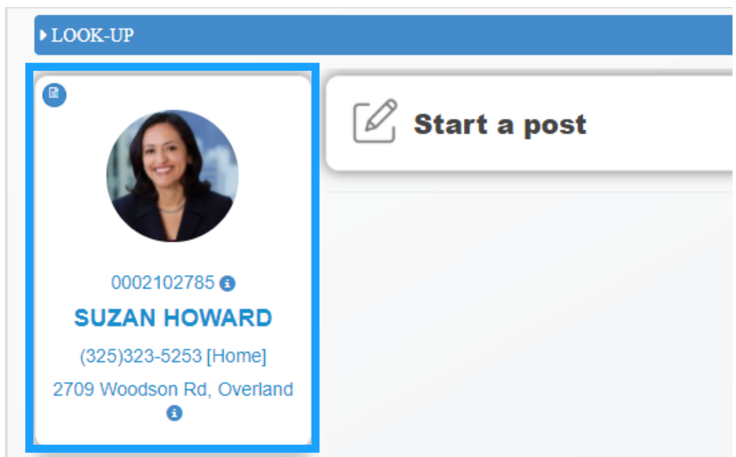


- DOB and SSN may be required when applying for future services
- Enter Phone number or Email
  - Mark Checkbox if phone number or Email is not available
- Click **SIGN UP**
  - The Clients Account will be display on the Account Summary page

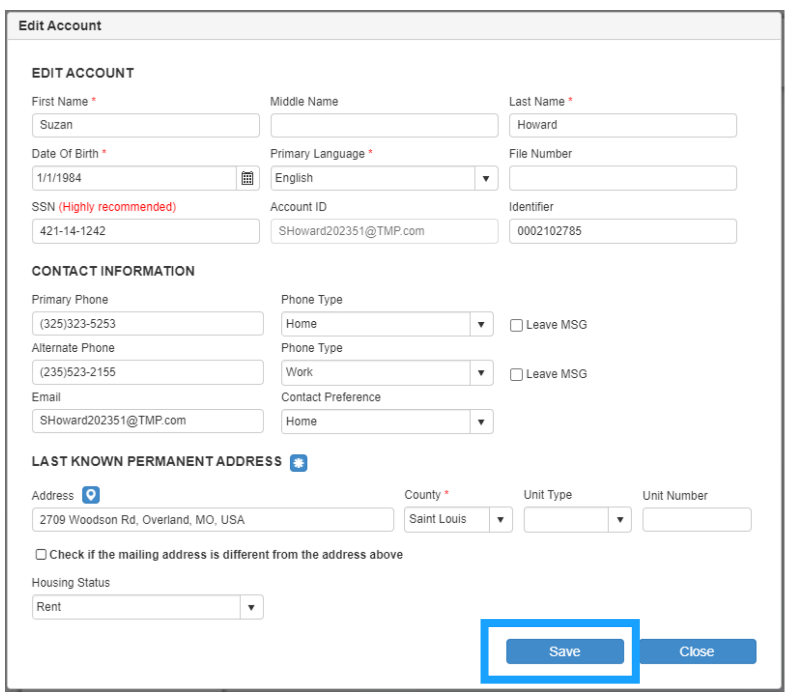


Add Contact Information:

- On the Account Summary page
  - Select Clients Name, Address or Customer ID number on the **Profile** section



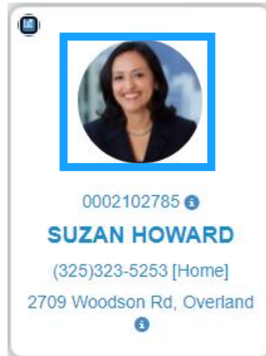
- In the **Edit Account** popup window:
  - Edit Account
  - Add Contact information
  - Enter Last Known Permanent Address
    - Address may auto fill Google Maps address
    - If mailing address is different than residential address, check box and enter address
  - To view Address History
    - Click **HISTORY** button next to Address
  - Click **SAVE**

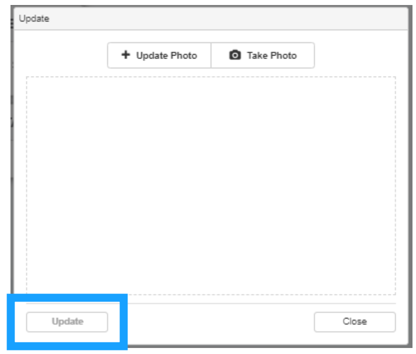


- To **Deactivate** account
  - Click on **DEACTIVATE** button on the **Profile** section

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
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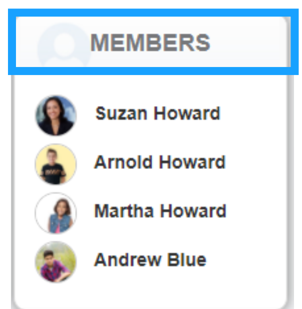
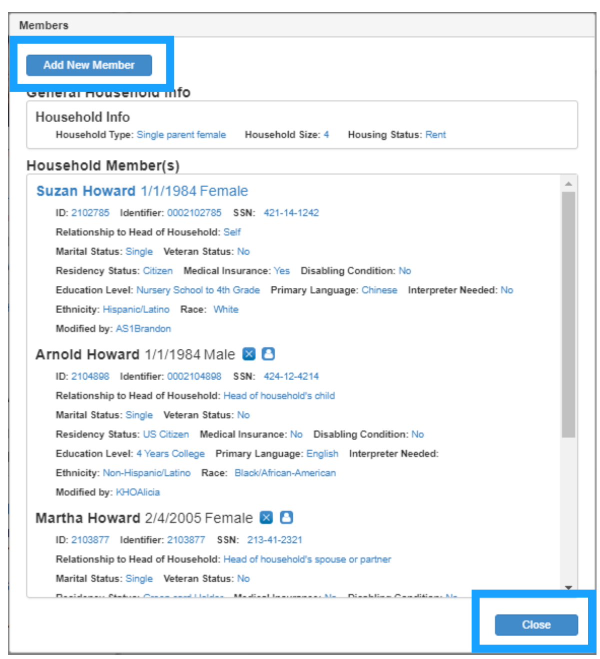
Add Member Information:

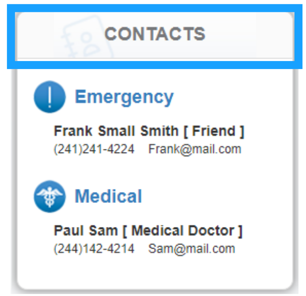




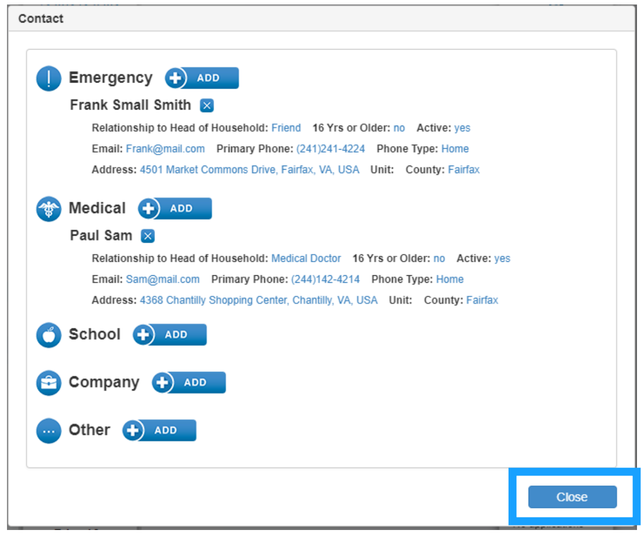
- On the Account Summary page, select **MEMBERS**
  - Click **ADD NEW MEMBER**
  - In the **Add Member** popup window:
    - Enter required fields
      - First Name
      - Last Name
      - Date of Birth
      - Gender
      - Education
      - Martial Status
      - Ethicnity
      - Relationship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

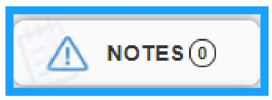
(Optional) Add Emergency Contacts:

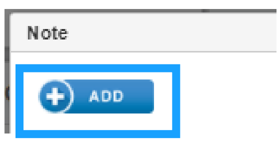


- On the Account Summary page, select **CONTACTS**
- In **Contact** popup window:
  - Click **ADD** next to Category Name needed
  - Enter or select Contact Information
    - Basic Information
    - Address
  - Check box if 16 Years or Older
  - Check box if Active
  - Click **SAVE**
- Contact will be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

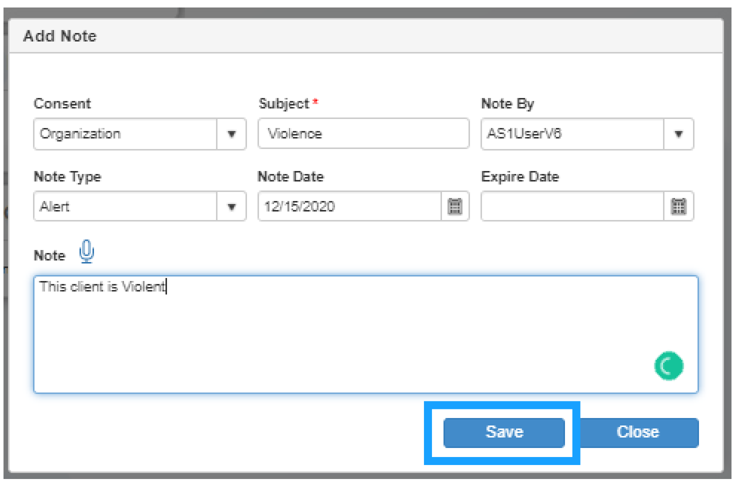


(Optional) Add Notes:



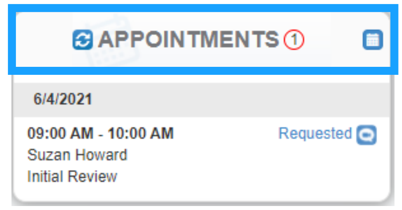


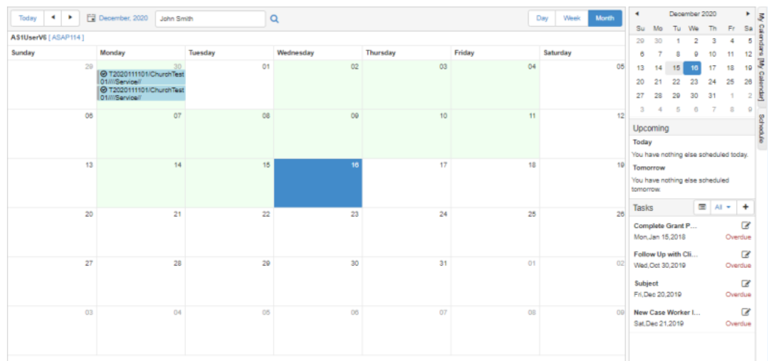
- On the Account Summary page, select **NOTES**
  - Click **ADD** next to Note
- In **Note** popup window:
  - Select Consent
  - Enter Subject
  - Enter Note Type
    - Alert will cause the client image border to flash at the top pof the page
  - Select Note Date
  - Enter Note Text
  - Click **SAVE**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

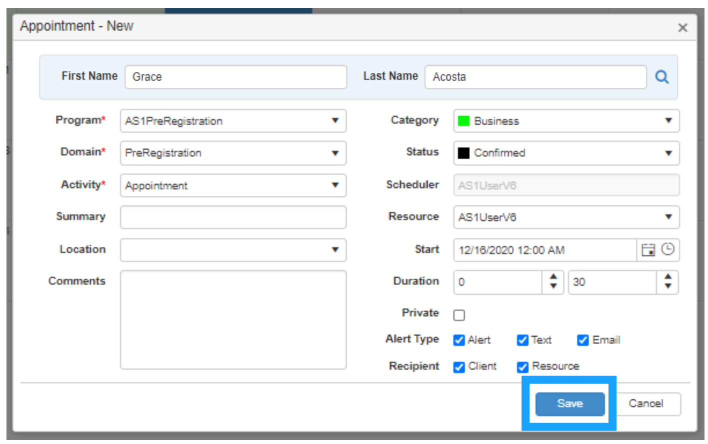


Add Appointments:

- 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 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

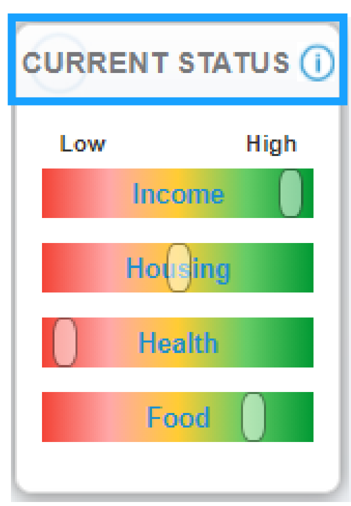




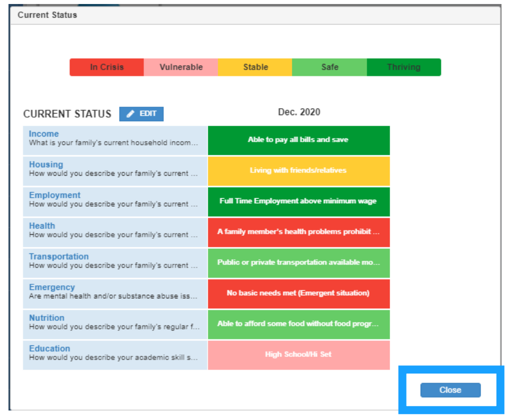


View/Edit Current Status:

- 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

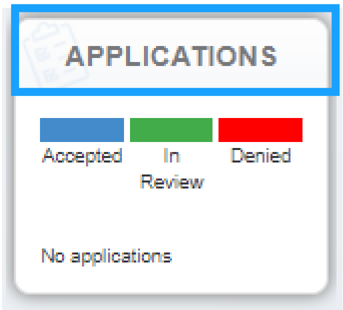


- Results for each Domain reflect the Client Assessment answer and are color coded according to the Scale Legend
- Click **EDIT** to update assessment questions
  - Update answers
  - Click **SAVE**
- Click **CLOSE** when done with the **Current Status** popup window



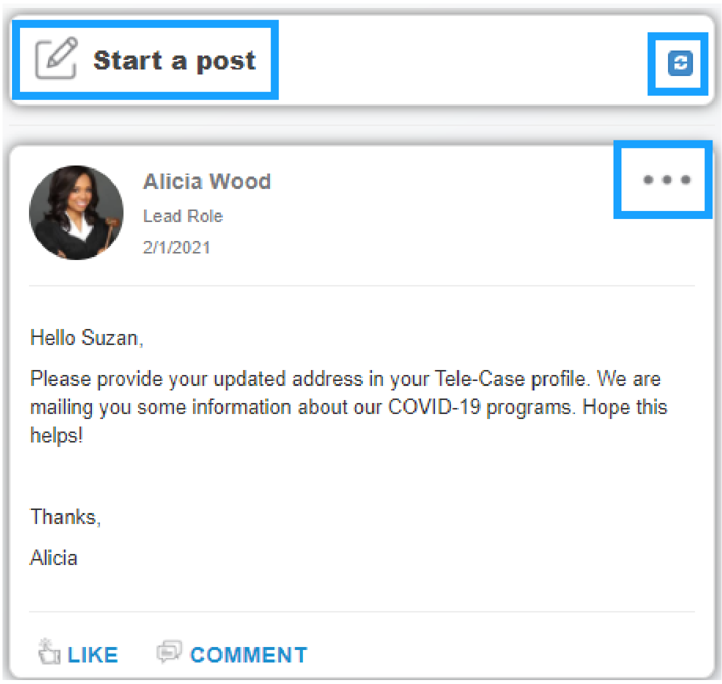
View Applications:

- 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.